
SELECTION, EVALUATION AND RE-EVALUATION OF VENDORS
PROCEDURE
(PUR-P006)

Clarksville-Montgomery County School System

1.0 SCOPE:

- 1.1 This procedure outlines the process for selecting, evaluating and re-evaluating vendors.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Schools Purchasing Agent

3.0 APPROVAL AUTHORITY:

- 3.1 Chief Financial Officer

4.0 DEFINITIONS:

- 4.1 CMCSS: Clarksville-Montgomery County School System
- 4.2 Non-critical vendors: Vendors selected who provide purchases from office stores, chain stores, general supply stores and similar type items.
- 4.3 Critical vendors: Vendors who provide services and products identified by each department that generally exceed \$10,000 that are procured through the bid process (ref. PUR-P004).

5.0 PROCEDURE:

- 5.1 All vendors on the CMCSS vendor list as of May 31, 2003 will be considered active and approved.
- 5.2 All vendors are evaluated on their ability to continually supply goods and services in a timely manner and according to their effect on the ability of CMCSS to achieve customer satisfaction.
- 5.3 Criteria for selection and evaluation of a non-critical vendor is as follows:
- 5.3.1 Based on product/service needs, school/department personnel identify vendors who meet the following criteria: provides desired product, accepts purchase orders, accepts payment terms, offers best value and completes shipping in a timely manner.
- 5.3.2 The vendor list is reviewed to determine if the desired vendor is currently approved and active in order to obtain the correct vendor number required for the ordering process (ref. [PUR-P002](#)).
- 5.3.3 If a vendor is not on the vendor list, a new vendor request is forwarded to the Purchasing Office with the following information: name of vendor, address, telephone and fax number and an e-mail address (if available).
- 5.3.4 Internal Revenue Service form W-9 is sent to vendor requesting their Federal Tax ID number.
- 5.3.5 Upon return of a completed W-9 to the Purchasing Office, a vendor number is assigned and vendor is added to the active vendor list.

SELECTION, EVALUATION AND RE-EVALUATION OF VENDORS
PROCEDURE
(PUR-P006)
Clarksville-Montgomery County School System

- 5.3.6 School or department is notified of the new vendor number.
- 5.3.7 Problems with purchases from non-critical vendors may be reported using the Nonconforming Products and/or Services Form ([PUR-F009](#)).
- 5.4 Potential critical vendors may request to be added to a bidders list by completing the Bidder Application Form ([PUR-F006](#)). This form is available in the Purchasing Office.
 - 5.4.1 Critical vendors are evaluated based on their ability to supply goods and services to CMCSS according to the stated specifications and within the prices quoted in their formal bid in a timely manner. Bidder Evaluation Forms (PUR-F007) for these vendors may be found in the appropriate bid folder pertaining to the purchase from this vendor.
 - 5.4.2 When a bid is awarded to a vendor that is not currently on the vendor list, an Internal Revenue Service form W-9 is sent to the vendor. Upon return of a completed W-9 to the Purchasing Office, a vendor number is assigned and vendor becomes active and is added to the vendor list.
 - 5.4.3 Re-evaluation occurs should a problem arise such as inability to deliver goods, inability to deliver goods at the prices quoted, inability to deliver goods in a timely manner; or a substitution of a product other than stated on bid. These problems may be reported using the Nonconforming Products and/or Services Form ([PUR-F009](#)). This is noted on the Bidder Evaluation Form (PUR-F007) located in bid folder.
- 5.5 Inability to satisfy any of the above criteria to the satisfaction of the Purchasing Department results in the vendor being placed on inactive status in the computer system. Those vendors are no longer evaluated and will not receive future bids or purchased orders.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Formal Bid Procedure ([PUR-P004](#))
- 6.2 Vendor List (computer generated)
- 6.3 Purchase Order Procedure ([PUR-P002](#))
- 6.4 Process Management System Manual ([PRM-M001](#), Sec. 7.4)
- 6.5 Bidder Application ([PUR-F006](#))
- 6.6 Bidder Evaluation (PUR-F007)
- 6.7 Nonconforming Products and/or Services ([PUR-F009](#))

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Bidder	Purchasing	Current plus two	Discard as	Secured Building

SELECTION, EVALUATION AND RE-EVALUATION OF VENDORS
PROCEDURE
(PUR-P006)
Clarksville-Montgomery County School System

Application	Office	years	Desired	
Bidder Evaluation	Purchasing Office	Current plus six years	Discard as Desired	Secured Building

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
2/13/03		Initial Release
5/30/03	A	Rewrite of procedure and flowchart
5/03/04	B	Replace Corrective Action Form (PRM-F005) with Nonconforming Products and/or Services Form (PUR-F009) in 5.3.7, 5.4.3, add to 6.0 and update flowchart

9.0 FLOWCHART:

9.1 A flowchart detailing this process can be found in "Exhibit A" of this procedure.

***** End of procedure *****

Selection, Evaluation and Re-evaluation of Vendors Flowchart

