

TITLE: Comprehensive Guide to District Procurement

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PURPOSE: The purpose of this reference guide is to assist District schools and offices with clear instructions for all procurement processes.

MAJOR CHANGES: This reference guide serves as the District’s central procurement policy and replaces the Procurement Manual, 10th Edition (September, 2023).

INSTRUCTIONS: The Procurement Services Department (PSD) is committed to assisting District schools and offices in procuring high-quality goods and general or professional services at competitive prices to support student achievement. This is accomplished through:

- Managing the purchase of supplies, equipment, and general and professional services through best practices.
- Overseeing the District’s Credit Card Programs, Vendor Services Unit, and the Unified Print Program.
- Providing customer service assistance with purchase orders and general procurement related questions and activities.

PSD Mission Statement

To provide schools and administrative offices with goods and general or professional services they need – when they need them. In doing this, we must ensure procurement laws are followed and the District achieves the most cost effective prices for goods and services.

ROUTING
All Employees
All Locations

The Procurement Reference Guide

This Procurement Reference Guide (Reference Guide) is designed to support District schools and offices in navigating the various procurement processes. It provides clear instructions and best practices to ensure that purchases are efficient, compliant, and fiscally responsible. From routine supply orders to complex services contracts, this Procurement Reference Guide outlines the necessary steps to complete a procurement process in alignment with District policies, state laws, and federal regulations.

Our goal is to always be "Easy to Do Business With," and PSD is committed to that motto. We hope this simplified reference guide continues our path of finding streamlined and simple processes for Procurement support.

I. Guiding Principles

The District's procurement processes are built on five key principles:

- **Accountability:** Maintaining transparency in contracting and spending decisions.
- **Competition and Fairness:** Creating a competitive and fair landscape for the purchase of high-quality goods and general or professional services.
- **Compliance:** Following all legal, financial, and procedural requirements.
- **Efficiency:** Ensuring processes are consistent and accessible to vendors and staff so that purchases are timely, cost-effective, and meet operational needs.
- **Outcome Focused:** Ensuring PSD drives better outcomes, reduces costs, and increases quality and innovation.

II. Who Should Use This Reference Guide?

The Reference Guide is a tool for schools and offices, to ensure compliant, efficient purchasing. It will help you:

- Understand approved purchasing methods and funding thresholds.
- Navigate the District's primary electronic purchasing platform, Ariba, and/or other procurement systems.

- Ensure compliance with state and federal regulations.
- Avoid common pitfalls and maintain budget accountability.

III. How to Use This Reference Guide

Each section in this Reference Guide covers a specific area of procurement, including:

- **Procurement Methods:** Step-by-step guidance for purchases, contracts, and approvals.
- **Payment Processes:** Using Purchase Orders (POs) and Purchasing Cards (P-Cards).
- **Receiving Goods and General or Professional Services:** Managing orders, handling damaged items, and reconciling invoices.

For additional support, PSD is available to assist with questions and training (see the “Assistance” section below for specific PSD unit contact information).

IV. Purchasing Goods and General or Professional Services

There are several options for purchasing goods and general or professional services. A step-by-step guide for each option is indicated below.

A. District Supply Center Distribution

The District Supply Center Distribution offers essential items to schools and offices. Follow these steps to order items from the District Supply Center:

1. Browse the Catalog available through the Ariba platform.
2. Place Orders in Ariba:
 - a. Regular Delivery (3-4 Days): Use Delivery Priority 1 in Ariba.
 - b. Same-Day Delivery: Use Delivery Priority 4 in Ariba by 9:00 a.m. (\$13 fee per 80 lbs.).
 - c. Overnight Delivery: Use Delivery Priority 3 in Ariba by 12:00 p.m. (\$9 fee per 80 lbs.).
 - d. Walk-Through (Will-Call): Visit the District Supply Center at 8525 Rex Road, Pico Rivera 90660. Specify the pick-up date and time in the “Notes and Attachments” field in Ariba.

- e. Damaged Goods (Commodities) or Shortages: Submit an [Order Adjustment Form](#) within 10 days of delivery.

B. Master and Bench Contracts

Master Contracts are competitively bid, pre-approved agreements (valid up to 5 years) with approved suppliers. When multiple contracts are awarded for a particular good and general or professional service, it is called a “**Bench**” of contracts. These contracts between the District and certain suppliers allow schools and offices to quickly buy goods and general or professional services without needing to negotiate prices or terms every time they wish to buy something.

Bench Contracts function like an approved list. Instead of having just one supplier, the District has conducted competitive solicitation and pre-approved multiple suppliers of particular goods and general or professional services. Schools and offices can choose from the "bench" of approved suppliers without needing to conduct a separate sealed bid or Request for Proposal (RFP) process or negotiate and execute new contracts.

District schools and offices can find and use Master and Bench Contracts for a variety of goods and general or professional services on the [Master Agreement](#) page of the PSD website.

Follow these steps to purchase goods and general or professional services from an existing Master/Bench Contract:

1. Create an Ariba Purchase Requisition.
2. Attach supplier’s itemized quote and required Task/Work Orders for professional services.
3. PSD will issue a purchase order to the vendor.
4. Only after the receipt of the purchase order can a vendor begin work or provide goods under the master or bench contract.

C. Low-Dollar Purchases (\$1 to \$10,000)

Use P-Card or issue Purchase Order:

1. P-Cards for purchases of up to \$10,000.

2. If P-Cards are not accepted, create an Ariba Purchase Requisition with approved funding.

For P-Card policy details, refer to [BUL-100823.0 District Policy and Procedures for District P-Card](#).

D. Procurements Over \$10,000

1. Goods or General Services:
 - a. Over \$10,000 to below current [State Competitive Bid Limit](#): Create an Ariba Purchase Requisition and attach itemized supplier quote.
 - b. State Competitive Bid Limit and above: Submit a completed [Request for Procurement Action](#) (RFP) form to psd-rfp@lausd.net with Scope/Statement of Work (SOW) and/or specifications (see *Attachment A – Statement of Work (SOW) Outline*). PSD will conduct a solicitation.
2. Professional Services:
 - a. Up to \$25,000: Create an Ariba Purchase Requisition and attach as many quotes as possible (at a minimum one quote, but preferably multiple).
 - b. Over \$25,000 to \$250,000: Submit a RFP form to psd-rfp@lausd.net with Statement of Work (SOW) and selection criteria. PSD will conduct a solicitation.
 - c. Over \$250,000: Submit an RFP with SOW and selection criteria. PSD will conduct a solicitation.
 - d. PSD will manage the supplier selection process and ensure compliance with the State Bid Limit and Procurement processes.

For a procurement process overview, refer to *Attachment B – Procurement Process Flowchart*.

E. Rental of a Non-District Facility

Provide the name of the event and unsigned vendor's contract, invoice/quote as part of the requisition entry. For more information, visit the [Rental of a Non-District Facility or Catering](#) page of the PSD website.

F. Sole and Single Source Procurements

1. A **Sole Source** procurement exists when goods and general or professional services, because of unique characteristics or other reasons (e.g., specialized parts or technology, technology licensing), are available only from one source with no alternatives. Requires justification and prior approval.
2. A **Single Source** procurement exists when there is more than one source, but a *preferred* source provides better value and conducting a competitive procurement would provide no benefit to the District (e.g., delivery time, compatibility, or capacity). Requires justification and prior approval.
3. Sole Source/Single Source Alternatives – Sole Source and Single Source procurements should be a last resort—not the first option.
 - a. **Check for Master/Bench Contracts:** The District already has established contracts for a variety of goods and general or professional services, saving you time and ensuring compliance.
 - b. **Obtain Multiple Quotes:** Even for smaller purchases, getting multiple price quotes ensures better deals and fair competition.
 - c. **Consult Procurement Services:** If you are unsure, reach out before assuming a Sole or Single Source procurement is necessary.

If you have determined that a Sole or Single Source procurement is necessary, consult Procurement Services for guidance and advice. For policy details, see [MEM-161313.1 – After-the-Fact Purchases and Single Source and Sole Source Purchases/Contracts](#).

V. Processing for Payment: Receiving Items or Services

Guide for handling received goods and general or professional services.

A. Enter Goods Receipt (GR) in Ariba

1. Payments CANNOT be processed until a GR is entered into Ariba.

- a. Enter GR promptly in Ariba to ensure timely payments and avoid supplier credit holds or penalties.
 - b. GRs must be entered prior to the end of the fiscal year, as all POs will be closed out at the end of the fiscal year and a new PO must be issued for the following year, when necessary.
2. How to Process:
 - a. Obtain the Purchase Order (PO) and supplier invoice.
 - b. Verify the delivery of goods and general or professional services against the PO.
 - c. Enter a partial GR, or full GR, based on what has actually been received or delivered.
- B. Handling of Damaged Goods (Commodities)
1. Upon Delivery:
 - a. Inspect shipments immediately.
 - b. Note any damage and notify the supplier.
 2. Post-Delivery: Report concealed damage to the supplier or District Supply Center.
 3. For additional support, contact the appropriate PSD unit (see the “Assistance” section for specific PSD unit contact information).
- C. Manage Shortages
1. Compare the delivered items with the PO in Ariba.
 2. Note discrepancies and inform the supplier or District Supply Center immediately.
- D. Return Materials
1. Coordinate with the supplier or District Supply Center for returns.
 2. Follow their instructions for return authorization and shipping.
- E. Professional Services
1. Ensure services match the contract’s terms and pricing in Ariba.
 2. Address discrepancies with the supplier directly, using contract terms for resolution.
 3. If the supplier repeatedly fails to comply with the terms of the contract, contact PSD for assistance in enforcing the

supplier's contractual obligations and determining the next appropriate steps.

F. Accounts Payable (AP) Requirements for Payment

1. Payments are processed only when these elements match in Ariba:
 - a. Purchase Order (PO): Ensure the PO is accurate and executed in Ariba.
 - b. Goods Receipt (GR): Verify receipt of materials/services in Ariba.
 - c. Invoices must include:
 - PO number
 - Supplier name and address matching Ariba records
 - Invoice number and amount
 - Service details and date range

Important: After-the-fact invoices or unapproved services are not eligible for payment. For policy details, see [MEM-161313.1 – After-the-Fact Purchases and Single Source and Sole Source Purchases/Contracts](#).

G. Contract Close-Out

1. Contract Close-Out:
 - a. Confirm all deliverables have been received.
 - b. Process final invoices in Ariba and unencumber unused funds.
 - c. Ensure the return of District property from suppliers.

H. Preventing Unauthorized Commitments

1. Ensure a valid PO or contract exists in Ariba before goods and general or professional services are provided.
2. Unauthorized commitments may result in personal liability.

I. Support Resources

- Ariba Training Materials:
<https://procurement.lausd.org/apps/pages/SAP-ARIBA-Phasell>
- For frequent Procurement related questions, refer to *Attachment C – Frequently Asked Questions (FAQs)*

- For additional support, contact the appropriate PSD unit (see the “Assistance” section for specific PSD unit contact information).

RELATED RESOURCES:

- [BUL-100823.0 District Policy and Procedures for District P-Card](#)
- [MEM-161313.1 – After-the-Fact Purchases and Single Source and Sole Source Purchases/Contracts](#)
- [BUL-101950.0 District Policy for Memorandums of Understanding without Payment Obligations \(No-cost MOU\)](#)
- [LAUSD Contractor Code of Conduct](#)

ATTACHMENTS:

Attachment A – Statement of Work (SOW) Outline
Attachment B – Procurement Process Flowchart
Attachment C – Frequently Asked Questions (FAQs)

ASSISTANCE:

For assistance or further information please contact the specific Department/ Office/Unit:

Accounts Payable Branch

Phone: (213) 241-4800 or Email: Accounts.Payable@lausd.net

Procurement Services Department (Beaudry)

Phone: (213) 241-3087

Procurement Customer Support Center (Pico)

Phone: (562) 654-9009 or Email: cs.stores@lausd.net

Credit Card Unit

Phone: (562) 654-9401 or Email: pcard@lausd.net

Travel Desk

Phone: (562) 654-9058 or Email: procurement.traveldesks@lausd.net

Mail Services Unit

Phone: (562) 654-9002 (Pico) or (213) 241-2058 (Beaudry)

Email: mail.unit@lausd.net

Truck Operations Dispatch Office

Phone: (562) 654-9000 or Email: truckop@lausd.net

Reprographics

Phone: (562) 654-9052 or Email: repro@lausd.net

Surplus Property and Recycling Annex

Phone: (213) 745-5910

For additional Procurement information, visit
<https://procurement.lausd.org> or use the following QR Code:



STATEMENT OF WORK (SOW)**OUTLINE****1. Program Overview**

- A. Background – Include any pertinent program history, stats, etc.
- B. Program Goals – What do we want to accomplish
- C. References – Any underlying law, standard, District bulletin, or District Strategic Plan affecting the contract

2. Requirements – The who, what, why, when, where, and how

- A. Program Description – Overview of what activities will occur
 - Schools or offices participating
 - Schedule of activities (days/times for services – must meet additional requirements for services during instructional time)
 - Location, including any space or equipment needs (for example, if virtual, what technology is needed)
 - Number of students who will be served, grade levels of students, and who will provide supervision (if applicable)
 - For professional development services, include release time and coverage requirements
- B. District Duties – What the District will do/provide
- C. Contractor Duties – What the Contractor will do/provide

3. Deliverables

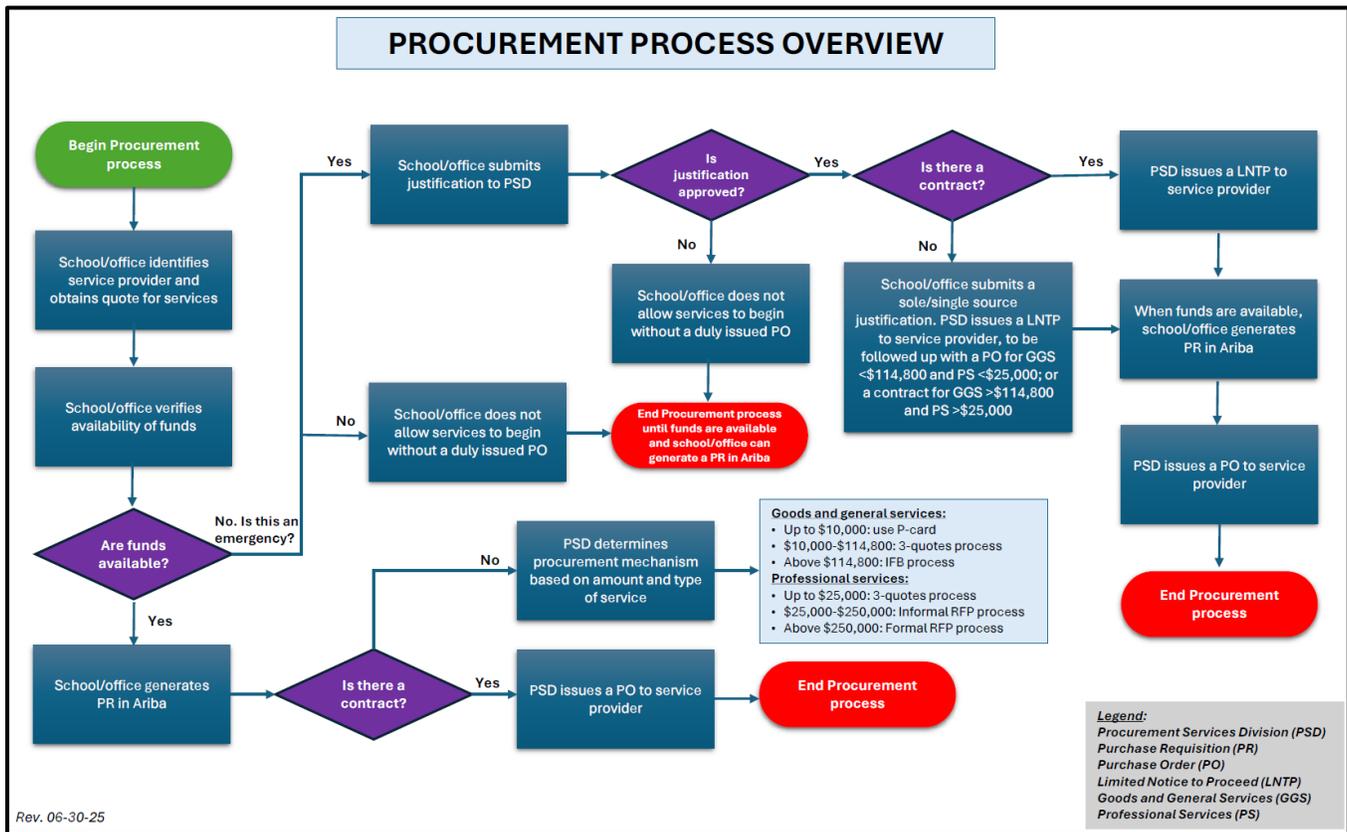
- A. Completion dates/milestones or items of attendance, progress, incidents, events, projects, program evaluation, etc.

4. Reporting

- A. Data/Reports required from Contractor

5. Other considerations

- A. Surveys/Evaluations/Research Studies – Must be reviewed and approved by the District's Committee for External Research Review (CERR) prior to commencing
- B. Student/District Data – Data Use Agreement (DUA) required
- C. For curriculum-based services and services provided during the school instructional day, consult DOI
- D. Parent consent forms needed for student participation, sharing student information, or publicity (video/photo)



Frequently Asked Questions (FAQs)

1. What do I need to do to get a Purchase Order (PO) issued?

- For the purchase of professional services for up to \$25,000, submit a Purchase Requisition (PR) via SAP Ariba and attach at least one quote (if available) along with the vendor's certificate of insurance (if available).
- For the purchase of goods and general services up to the state bid limit ([found here](#)), submit a PR via SAP Ariba and attach at least one quote (if available) along with the vendor's certificate of insurance (if available).
- For the purchase of professional services over \$25,000; or for goods and general services over the state bid limit, submit a completed/signed [Request for Procurement Action \(RFPA\)](#) and the Statement of Work to initiate an informal or formal competitive process.

2. How do I create a Purchase Requisition (PR)?

Refer to the following link for Ariba Ordering resources and Job Aids: <https://procurement.lausd.org/apps/pages/SAP-ARIBA-PhaseII>

3. Do we need to submit a Purchase Requisition for all purchases?

No. A PR is not required for purchases where a P-Card can be used. You may purchase supplies and unrestricted items with your P-Card for up to \$10,000 per purchase. For the P-Card policy and access to the Restricted Items List, refer to [BUL-100823.0 District Policy and Procedures for District P-Card](#).

4. What does my Purchase Requisition Status mean?

- **Composing:** Draft status. The PR has not been submitted for approvals. Ariba autosaves progress, so you will not lose your work.
- **Submitted:** The PR has been submitted for approval but has yet to be fully approved.
- **Ordering:** Appears on PR from the Stores Warehouse. If a PR shows "Ordering" instead of "Ordered," it may indicate an issue and prevent from creating Purchase Order (PO).
- **Ordered:** Fully approved. A PO has been created, and Receiving can begin.
- **Receiving:** The order has been partially received.
- **Received:** All items on the PO have been received, and no further action is required from the requestor.

5. How long does it take for transactions to occur/POs to be issued?

Processing time varies by procurement type:

- P-Card transactions: real-time.
- Professional services up to \$25,000: up to 15 days.
- Goods/general services up to state bid threshold: up to 15 days.
- Goods, general, and professional services up to \$250,000: up to 60 days.
- Over \$250,000: timeline varies; consult PSD.

6. If I am requesting a service such as after-school enrichment or supplemental arts instruction, do I have to get three quotes and insurance before submitting a Purchase Requisition?

No. If you have a specific service/vendor in mind, submit:

- A Statement of Work (who, what, when, where, why)
- Contact information
- A price quote
- A certificate of insurance (COI), if available

Attach these to the PR. PSD will determine if bidding is required and will contact you if additional quotes or information are needed. Providing two or more quotes may help speed up the process but is not required.

7. Our school has used a particular Vendor for seven years. Why do they have to submit a bid or proposal?

To ensure fairness, compliance, and best value, the District requires competition. PSD will determine the contracting method, ensuring all current District and legal requirements (insurance, fingerprinting if applicable, security, etc.) are met.

8. How can a vendor get on a bench?

Vendors must go through a competitive process (e.g., Request for Proposals) to be awarded a master contract and placed on a bench. Benches are created by requestors (departments/schools) who sponsor them. Multiple vendors on a bench provide schools/offices with options for the same or similar services. To access the available list of bench contracts available for use, click [here](#).

9. Vendor Z says they are an “approved District vendor.” How can they be made known to all schools and offices?

There is no such designation. Having a District supplier/vendor number only allows a vendor to receive an approved PO—it does not mean they can automatically provide services. To check if a vendor has a master contract, contact PSD. Salespeople should not directly approach schools. Vendors may register [here](#) to be notified of bid or proposal opportunities.

10. What are the insurance requirements for vendors?

Refer to the [Risk Management Insurance Requirements and Limits Matrix](#).

11. Do we have to submit a Facilities Use Approval with our Purchase Requisitions?

No. These are two different processes:

1. Facilities Use Approval: Required when an outside group wants to use school space during non-instructional hours, funded entirely by outside parties.

2. Request for Onsite District Sponsored Event/Offsite Special Event: Required when a school/District funds and plans an event involving a third party during instructional hours. Submit to Risk Management along with the PR.

12. What is the process if the contract or service is funded by PTA/PTO or another external organization?

It varies, depending on whether the PTA/PTO or other external organization is paying the vendor directly or donating the funds to the school/District.

- If the organization is donating the funds to the school/District, then the procurement processes outlined in question #2 should be followed. In addition, reference [BUL-5895.2 Donations](#) to ensure all donation guidelines are being followed.
- If the group pays the vendor directly: District procurement does not apply. However, if the school is asked to sign a contract, email the contract and vendor COI (if available) to your Region Buyer for review. PLEASE NOTE: Only PSD can execute contracts on behalf of the District.

13. What is the process for Associated Student Body (ASB), Student Council, Student Activities Group, or other student groups?

A PR is not required for student group contracts. If a vendor asks the school to sign a contract:

- Email the contract and vendor COI (if available) to your Region Buyer for review.
- PSD will execute the contract, with costs borne by the student group.
- Competitive bidding is not required but may help reduce costs.

PLEASE NOTE: Only Procurement has delegated authority to execute a contract on behalf of the District, and therefore a school should not sign contracts/agreements.

For common services with master contracts (e.g., Jostens, yearbooks, photos, graduation caps/gowns), schools should contact the vendor, request a quote, and confirm it matches the contract terms. Refer to:

- [BUL-1295.4 High School Pre-Commencement, Diploma and Senior Activity Guidelines](#),
- [REF-6484.11 2025 Graduation Caps, Tassels and Gowns](#)
- [REF-6643.2 Contract for Yearbook Vendors](#)

14. Who should I contact if I want to follow up on my Purchase Requisition or have any Procurement related questions?

You should contact PSD for support. For specific points of contact visit: <https://procurement.lausd.org/apps/pages/Goods-and-General-Services>.