CBO COOPERATIVE BIDS

User’s Guide

Overview and Specific Instructions for Administration, Requestors and Secretaries/Staff

CBO COOPERATIVE BIDS

User’s Guide

# What is in this users guide?

This user’s guide contains information on the Broome BOCES Cooperative Bidding Service as well as key topics for Administrators, Requestors and Secretaries/Staff.

Also included is guidance on how to continue to use the Cooperative Bid throughout the school year.

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**OVERVIEW**

**Central Business Office Cooperative Purchasing Service**

This service enables participating districts to take advantage of large-volume purchasing through the cooperative bidding of materials and supplies. At this time here are thirteen participating school districts. Three major bids are done for each fiscal year and information is gathered from each district through the use of bid catalogs. The summary information for all districts is combined and sent out to participating vendors.

Three cooperative bids available:

* Teaching - which includes sections for teaching supplies, classroom supplies, elementary art supplies and office supplies
* Secondary Art Supplies
* Janitorial Supplies

**ANNUAL TIMELINE**

|  |  |
| --- | --- |
| October 31, 2014 | Any new items to existing bids by emailing list to Robyn Pinkerton at [rpinkert@btboces.org](mailto:rpinkert@btboces.org).  New items can be submitted at any time throughout the year and will be added to the subsequent year’s coop catalog. |
| November 17, 2014 | Teaching and Secondary Art Catalogs provided to districts for placing orders for 2015-16 supplies |
| November 24, 2014 | Janitorial Catalog provided to districts for placing orders for 2015-16 supplies |
| January 31, 2015 | Catalogs due back to CBO from teachers/other district personnel.  (We encourage catalogs to be submitted to CBO as soon as possible if ready.) |
| February – May 2015 | Advertising and bid upload and analysis performed |
| May 6, 2015 | Bids awarded: Janitorial |
| June 17, 2015 | Bids awarded: Teaching and Secondary Art |
| July – September 2015 | Orders received and paid  Any items not awarded/received are re-ordered with another vendor |

**INSTRUCTIONS FOR ADMINISTRATORS**

For each cooperative bid, catalogs and a corresponding table of contents will be provided to the district via the use of EXCEL files. This information needs to be distributed to teachers and other requestors. Many districts use the district website or a districtwide network to do this. The teachers and other requestors will need to know when the completed bid catalogs are due as well as any dollar limitations.

Once the bid catalogs are completed they should be sent to the appropriate administrator (superintendent, principal or department head) or designee for review. Once approved the bid catalogs should be sent to Robyn Pinkerton at the BOCES Central Business Office. She will take care of uploading the information to the district’s accounting system and completing the bidding process.

**INSTRUCTIONS FOR REQUESTORS**

1. Open the Bid Catalog file(s) provided to you by your superintendent, principal or department head.
2. Save the file with your name in the title (i.e. *Mary Smith - Teaching).*
3. Fill in the Name field with your first name, middle initial and last name.
4. Fill in the School/District field with your building name/district name.
5. Fill in the Account Code field with the appropriate nVision Code if known.



1. Open the Table of Contents file.
2. Find the commodity item number in the Table of Contents file for the items you wish to order.



**INSTRUCTIONS FOR REQUESTORS (Con’t)**

1. Go to this commodity number in the Bid Catalog file.



1. Enter the requested quantity for each item chosen.
2. When completed click on the drop down box.
3. Uncheck the “Blanks” box. This will “roll the file up” so that only those items that were requested will appear.
4. Save the file.
5. E-mail to the building secretary or other identified staff person.

**TIP!** *If desired, the item part number can be entered in the vendor’s website in order to view the item. In the example above, 38366 can be enter in the Kurtz (k) website search field. Items that can be viewed in the School Specialty catalog are prefaced by an (s). Simply click on the link to be taken directly to the web page.*

**IMPORTANT:** Do not delete lines or cut and paste lines in this file. It will cause the operation of the file to fail and not upload properly to the district’s accounting system.

**INSTRUCTIONS FOR SECRETARIES/STAFF**

1. Check that each file heading sent by teachers or other requestors is complete. Are the Site, Site Desc and nVision fields filled in?
2. Fill in the Ship to field.
3. Check that any maximum dollar allocation is not exceeded.
4. Forward to building principal or department head for approval if instructed to do so.
5. E-mail reviewed/approved EXCEL files to Robyn Pinkerton at the BOCES Central Business Office. [rpinkert@btboces.org](mailto:rpinkert@btboces.org).

**NOTE:** This completes the ordering process for the regular cycle of the BOCES Cooperative Bid. Resulting purchase orders will be generated directly from the accounting system. Items ordered through this process will be delivered during the summer and possibly first few days of September.

For items that were not bid by any vendor and what to do next see the next section

**“NO BID ITEMS”**.

For orders for additional items needed throughout the year see the section **“AFTER COOP” ORDERING INSTRUCTIONS.**

**“NO BID” ITEMS**

Each year there are a few requested items that are not bid on by any vendor. The main reason for this is that after the catalogs are distributed to the school districts in mid-November the manufacturer discontinues an item.

Robyn Pinkerton will send an e-mail to building secretaries/staff with an attachment for each individual that requested an item(s) which did not receive a bid. The secretaries/staff then sends an e-mail to those requestors informing them that there were items that will not be received. The requestors may order another similar item(s) from another source if desired.

**“AFTER COOP” ORDERING INSTRUCTIONS**

Prices on the items in the cooperative bid catalog will be honored during the school year.

School Specialty through April 30th

Commercial Art through April 1st

Dick Blick through December 31st

If a requestor would like to order more cooperative bid items during the school year from the sources above they should send a list of items directly to their secretary or staff person. The secretary or staff person will e-mail the list to Robyn Pinkerton. She will create an order list and return it to the secretary or staff person who will create a requisition in the nVision system. The requisition needs to reference the bid award number. The body of the requisition can say “per attached list”. The list should be sent to the purchasing department.