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## Supplier Performance Evaluation Procedure (PUR-P201)

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

### 1.0 SCOPE:

- 1.1 This procedure describes how Purchasing evaluates suppliers, supplier products and/or services and how Purchasing is evaluated by our customers.

### 2.0 RESPONSIBILITY:

- 2.1 Chief Financial Officer

### 3.0 APPROVAL AUTHORITY:

- 3.1 Chief Financial Officer
- 3.2 Purchasing Supervisor

*(Approval signature on file)*

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

### 4.0 DEFINITIONS:

- 4.1 CFO – Chief Financial Officer
- 4.2 RFB – Request for Bid
- 4.3 RFP – Request for Proposal
- 4.4 CPM – Capital Projects and Facilities Management

### 5.0 PROCEDURE:

- 5.1 Ninety (90) days prior to expiration of recurring RFB/RFP issued for services/products, the Buyer or designee will complete the Supplier Performance Evaluation form (PUR-F210) items #1-10 and electronically mail it to supervisor of using department, who will fill in items #11-16. Buyer will specify a date by which the form is to be returned.

- 5.1.1 When the Buyer or designee receives form back with a positive response:

- 5.1.1.1 Buyer or designee will send out renewal letter (PUR-F213) to supplier.
- 5.1.1.2 Buyer will file/delegate filing of evaluation in respective bid file.
- 5.1.1.3 Buyer will give copy of signed renewal letter to Secretary or designee, who will update bid calendar to reflect contract extension.

- 5.1.2 When Buyer receives form back with a negative response:

- 5.1.2.1 Buyer will evaluate why the performance is unsatisfactory by researching customer issues with the supplier, get the supplier's response and make written notes.
- 5.1.2.2 Buyer will forward to Purchasing Supervisor for final determination his/her recommendation with supporting documentation attached to the Supplier Performance Evaluation Form to either continue or suspend doing business with the respective supplier.



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- 5.1.2.3 If Buyer's recommendation is to suspend doing business with a respective supplier and the Purchasing Supervisor agrees, a letter will be sent to the supplier documenting the issues leading to that decision.
- 5.1.3 If Buyer does not receive form back from using department:
- 5.1.3.1 Buyer will have discretion as to whether the contract will be renewed based on information Buyer has with relation to the supplier's performance of the contract.
  - 5.1.3.2 If Buyer decides to renew contract, 5.1.1 will be followed.
  - 5.1.3.3 If Buyer decides not to renew contract, 5.1.2 will be followed.
- 5.2 An annual customer survey of the District's major service/product suppliers will be conducted with the Supplier Survey (PUR-F252).
- 5.3 Within a six-month time-frame after a new school has had an opportunity to evaluate and use the furniture, fixtures and equipment supplied by CPFM and Purchasing, a survey agreed upon by CPFM and Purchasing will be sent to the school requesting an evaluation of products.
- 5.4 Supervisor's approval is always requested prior to disposition of any documentation.

### 6.0 ASSOCIATED DOCUMENTS

- 6.1 Supplier Performance Evaluation Form (PUR-F210)
- 6.2 Contract Renewal Letter (PUR-F213)
- 6.3 Supplier Survey (PUR-F252)

### 7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Supplier Performance Evaluation	Relating to RFQ/ RFB/RFP - Filed Purchasing Bid File, Purchasing Office	7 Yrs.	Discard as desired	Standard File Cabinet in Secured Office
Supplier Survey	Relating to RFQ/ RFB/RFP - Filed Purchasing Bid File, Purchasing Office	7 Yrs.	Discard as desired	Standard File Cabinet in Secured Office
Customer Service Survey	Relating to RFQ/ RFB/RFP - Filed Purchasing Bid File, Purchasing Office	7 Yrs.	Discard as desired	Standard File Cabinet in Secured Office



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### 8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
2/1/06	A	Initial Release
11/30/06	B	Procedure was redesigned in response to Corrective Action Request (2006-077) to include clarification of routing signed purchase orders.
5/1/07	C	Added 5.4; updated Record Retention Table
9/10/08	D	Deleted sentence in 5.1 to add in Buyer and designee; added last sentence to 5.1; add "or designee" to 5.1.1.1 and 5.1.1.3; deleted last part of sentence in 5.1.1.2; added new sentences 5.1.3, 5.1.3.1, 5.1.3.2, and 5.1.3.3; changed CPP to CPFM in 5.3.
2/10/09	E	4.4 Changed CPP to CPFM, 5.2 added "with the Supplier Survey (PUR-F525), 6.2 changed Bid to Contract, added 6.3

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