KANSAS CITY COLLABORATION, PROCUREMENT, & PURCHASING PRACTICES STUDY

REPORT

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SURVEY PARTICIPANT INFORMATION

Invitations to participate in the online survey were emailed to sixty-three LEAs in the greater Kansas City Area. Two LEAs were removed due to impending closure and a third LEA was removed because of ongoing natural disasters in the area, yielding 60 eligible LEAs to complete the survey. The number and percent of Local Education Agencies (LEAs) type are shown in Table 2. Urban LEAs accounted for the most responses (N=10, 47.6%), followed by Suburban LEAs (N=6, 28.6%). Participating LEAs were predominantly Small (N=11, 53%), followed by Large LEAs (N=7, 33%). Chart 1 illustrates LEA participation by geography and size. Approximately one-third of LEAs that were invited to participate completed the survey (n=21).

Table 1. LEA Survey Participants

LEA Type		LEA Survey Respondents (N=21)	
Geography	Size	Number	Percent
Urban (47.6%)	Small	6	28.6%
	Large	4	19.0%
Suburban (28.6%)	Small	1	4.8%
	Medium	2	9.5%
	Large	3	14.3%
Town/Rural (23.8%)	Small	4	19.0%
	Medium	1	4.8%

Chart 1. Survey Participants by Type
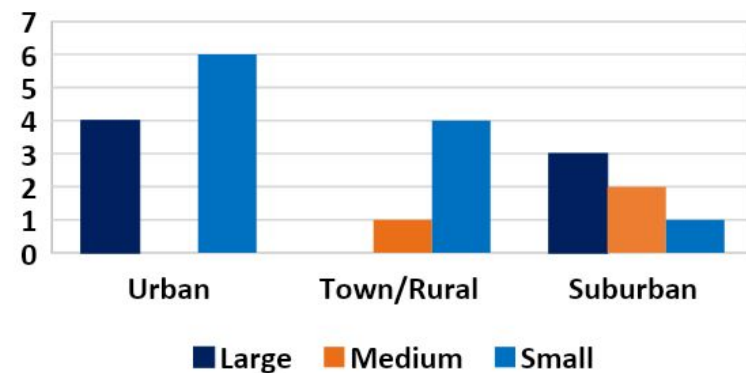
PURCHASING PRACTICES

All survey respondents reported that they utilize micro-purchasing, informal (small purchases), and formal bid processes (large purchases). Table 2 details the spending range by purchasing type (i.e., micro-purchases, small purchases, and large purchases) for LEAs by geography and size. Significant variation is shown among Urban LEAs, particularly Urban Small LEAs. In addition, the spending range reported for Suburban Medium LEAs (small and large purchases) was also noticeably higher.

Table 2. Purchasing Practices: Spending Range By LEA Type				
LEA Type		Purchasing Type (N=21)		
		Micro-Purchases (Maximum Allowable)	Small-Purchases (Maximum Allowable)	Large Purchases (Minimum Allowable)
Geography	Size	Range	Range	Range
Urban	Small (N=5)*	**$2,000-$50,000**	**$10,000-$250,000**	**$25,000-$250,001**
	Large (N=4)	**$3,499-$19,999**	$14,999-$24,999	$15,000-$25,000
Suburban	Small (N=1)	$2,000-$2,000	$14,999-$14,999	$15,000-$15,000
	Medium (N=1)**	$3,500-$3,500	**$45,000-$45,000**	**$45,001-$45,001**
	Large (N=3)	$3,000-$5,000	$7,500-$14,999	$10,000-$20,000
Town/Rural	Small (N=4)	$3,000-$5,000	$15,000-$19,999	$15,000-$20,000
	Medium (N=1)	$3,000-$3,000	$14,999-$14,999	$15,000-$15,000

 * Missing Data – 2 LEAs (1 Suburban Medium & 1 Urban Small)

Table 3 illustrates the mean number of approvals required for each purchasing type (micro-purchases, small purchases, and large purchases) and the range of responses by LEA type (i.e., geography and size). As shown, the mean number of required approvals remained the same for micro- and small purchases in three LEA types (Suburban Small, Suburban & Town/Rural Medium), while three LEA types reported greater oversight (Urban & Suburban Large & Town/Rural Small); two of the LEAs reported as many as 7 and 9 approvals for small purchases (increases are bolded). Similarly, the number of approvals needed for large purchases was greater than for small purchases for five LEA types (Urban Small & Large, Suburban Medium & Large, and Town/Rural Small). Several LEAs required fewer approvals for large purchases (Suburban & Town/Rural Small) in comparison to small purchases.

Table 3. Purchasing Practices: Approvals Required by Purchasing Type							
LEA Type		Number of Approvals Required by Purchasing Type (N=20)*					
		Micro-Purchases		Small Purchases		Large Purchases	
Geography	Size	Mean #	Range	Mean #	Range	Mean #	Range
Urban	Small (N=5)	2.20	1-4	1.80	1-2	**2.60**	**2-4**
	Large (N=4)	1.50	1-2	**3.50**	**1-9**	**4.75**	**3-10**
Suburban	Small (N=1)	4.00	4-4	4.00	4-4	3.00	3-3
	Medium (N=2)	1.50	1-2	1.50	1-2	**2.50**	**2-3**
	Large (N=3)	1.66	1-2	**3.33**	**1-7**	**3.66**	3-4
Town/Rural	Small (N=4)	2.75	1-5	**3.25**	2-5	2.25	3-3
	Medium (N=1)	3.00	3-3	3.00	3-3	**4.00**	**4-4**

* Missing Data – 1 LEA (Urban Small)

Table 4 shows that LEAs are evenly distributed in terms of whether they conduct spend analyses to link purchasing decisions to outcomes, including student outcomes, with ten respondents answering "Yes", and ten answering "No". Urban Large LEAs ae most likely to conduct spend analysis (100%), followed by Urban Small LEAs (75%). Suburban and Town/Rural LEAs are less likely to link purchases to outcomes. Additionally, the majority of respondents indicated that their LEA participates in a purchasing collaborative (N=14).

Table 4. Purchasing Practices: Use of Data Analytics & Cooperative Buying Methods					
LEA Type		**LEA Purchasing Practices (N=20)**			
		Conducts Spend Analysis (N=20)*		**Purchasing Collaborative Used (N=19)***	
Geography	**Size**	**Yes (N=10)**	**No (N=10)**	**Yes (N=15)**	**No (N=4)**
Urban	Small (N=6)	4	2	1	4
	Large (N=4)	4	-	4	-
Suburban	Small (N=1)	1	-	1	-
	Medium (N=2)	-	2	2	-
	Large (N=3)	-	3	3	-
Town/Rural	Small (N=3)	-	3	3	-
	Medium (N=1)	1	-	1	-

* Missing Data – 1 LEA (1 Town/Rural Small)

** Missing Data – 2 LEAs (1 Town/Rural Small & 1 Urban Small)

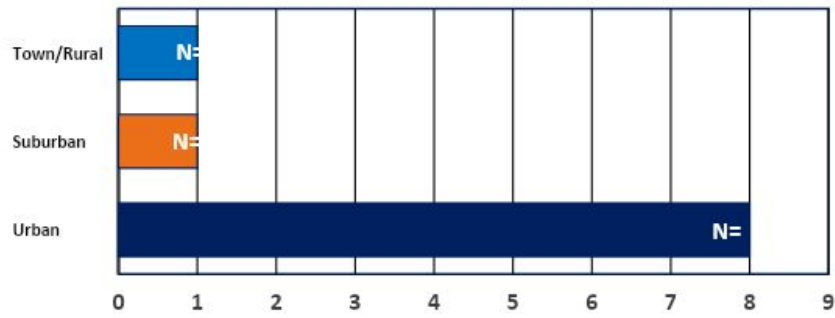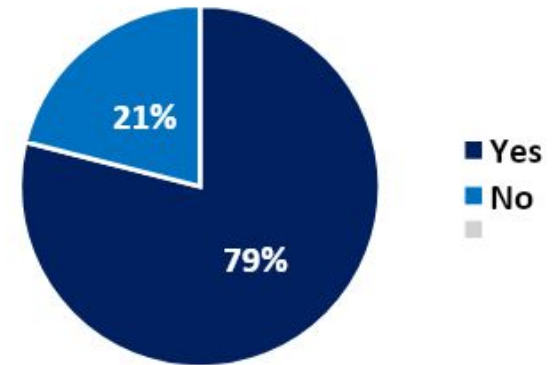**Chart 2. 'Urban' accounts for the majority of 'Performs Spend Analysis - YES'**

Town/Rural	N=
Suburban	N=
Urban	N=

0 1 2 3 4 5 6 7 8 9

Chart 3. LEA Participates in a Purchasing Collaborative

21%

79%

- Yes
- No

ACCOUNTABILITY & FLEXIBILITY

Table 5 details findings related to purchasing accountability and flexibility. Key results show that:

- About 40% of LEAs (N=8), reported that school administrators have the authority to purchase needed products and services without higher level approval. The spending range for school administrator independent purchasing ranged from $3,500 (Town/Rural Small) to $19,000 (Urban Large).
- 33% of LEAs (7 of 21) reported utilizing a purchasing committee to guide the purchasing and procurement process.
- Nearly all participants (19 of 20 respondents) procure products and services online (data not shown in Table 5).
- 33% of LEAs issue purchasing cards (P-cards) to staff. The P-card expenditure limit is typically under $10,000, except for Urban Small and Large LEAs, with P-card spending capped at $40,000 and $50,000, respectively.

Table 5. LEA Purchasing Accountability & Flexibility (N=21)

LEA Type		School Administrators Procure Without Higher Level Approval*			Purchasing Committee Used		Purchasing Cards Issued***		Purchasing Card Spending Range****
Geography	Size	Yes (N=8)	No (N=12)	Spending Range	Yes (N=7)	No (N=14)	Yes (N=10)	No (N=8)	Spending Range
Urban	Small	2	3	$10,000-$10,000	2	4	2	3	$40,000-$40,000
	Large	3	1	$5,000-$19,999	4	2	3	1	$5,000-$50,000
Suburban	Small	-	1	-	-	1	-	-	-
	Medium	-	2	-	-	2	2	-	$2,000-$5,000
	Large	2	1	$3,500-$10,000	-	2	3	-	$7,500-$10,000
Town/Rural	Small	-	3	$3,500-$3,500	1	2	1	4	$3,500-$3,500
	Medium	1	1	-	-	1	-	-	-

* Missing Data – 1 LEA (1 Urban Small)   *** Missing Data – 2 LEAs (1 Urban Small & 1 Town/Rural Medium)

** Missing Data – 1 LEA (1 Town/Rural Medium)   ****Missing Data – 1 LEA (Urban Large)

VENDOR RELATIONS & STANDARDIZATION

Table 6 details information about LEA vendor relations and standardization. Over half of participants (57%) maintain a list of approved vendors, but only about a quarter of those who maintain an approved vendor list have a streamlined process for vendors

(27%). Additionally, close to two-thirds (63%) publish bid policies online and over half of participants use a template to evaluate formal bids (58%). Chart s 4-7 display this information for quick visual reference.

Table 6. Vendor Relations & Standardization									
LEA Type		**Approved Vendor List Maintained**		**Process Streamlined (Approved Vendors)***		**Bid Process Policies Published Online****		**Template Used For Bid Reviews****	
Geography	Size	Yes (N=12)	No (N=9)	Yes (N=8)	No (N=3)	Yes (N=12)	No (N=7)	Yes (N=11)	No (N=8)
Urban	Small	3	3	2	1	2	3	2	3
	Large	4	-	3	1	3	1	4	-
Suburban	Small	-	1	-	-	-	1	-	1
	Medium	-	2	-	-	1	1	-	2
	Large	2	1	2	-	2	1	2	1
Town/Rural	Small	2	2	1	-	3	-	2	1
	Medium	1	-	-	1	1	-	1	-

   * Missing Data – 1 LEA (1 Town/Rural Small).

   ** Missing Data – 2 LEAs (1 Urban Small, 1 Town/Rural Small).

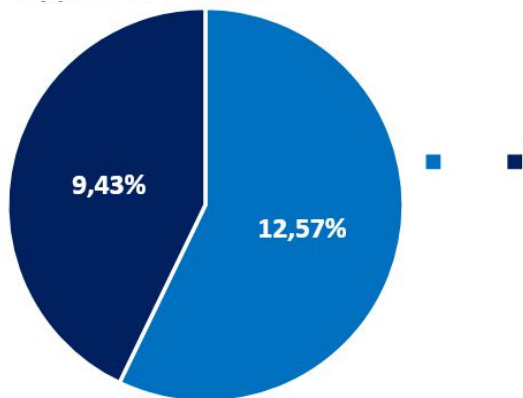## Chart 4. LEA Maintains a List of Approved Vendors

9,43%
12,57%

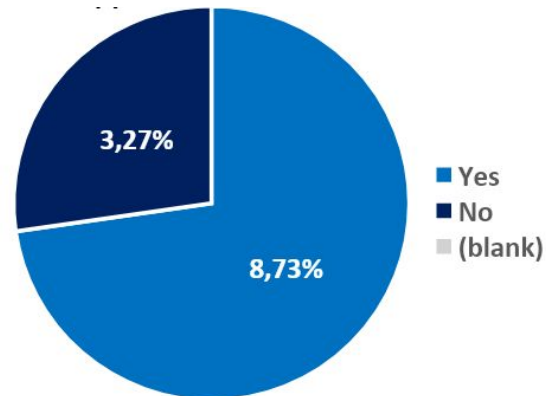## Chart 5. LEA Has a Streamlined Process of Approved Vendors

3,27%
8,73%

- Yes
- No
- (blank)

Chart 6. LEA Publishes Procurement Policies Online

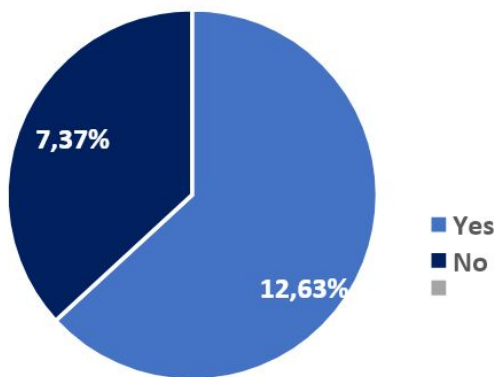
7,37%
12,63%

- Yes
- No

Chart 7. LEA Uses Templates to Review Bids
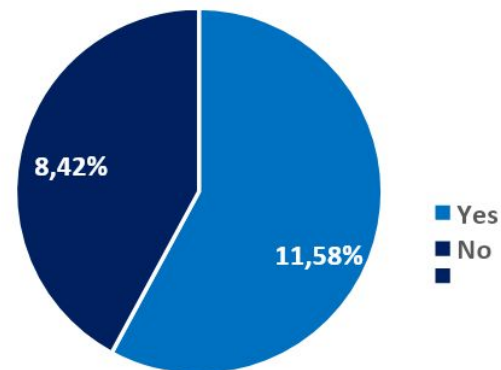

8,42%
11,58%

- Yes
- No

Chart 8 shows whether the LEA maintains a list of approved vendors by geography. Urban LEAs are most likely to maintain a list of approved vendors (70%), followed by Town/Rural (60%) and Suburban LEAs (33%). Sixty percent of Urban LEAs all Town/Rural LEAs reported that the publish bid policies online; suburban LEAs were divided on their response (Chart 9).

Chart 8. LEA Maintains a List of Approved Vendors	Chart 9. LEAN Publishes Bid Policies Online by Geography

Chart 8. LEA Maintains a List of Approved Vendors
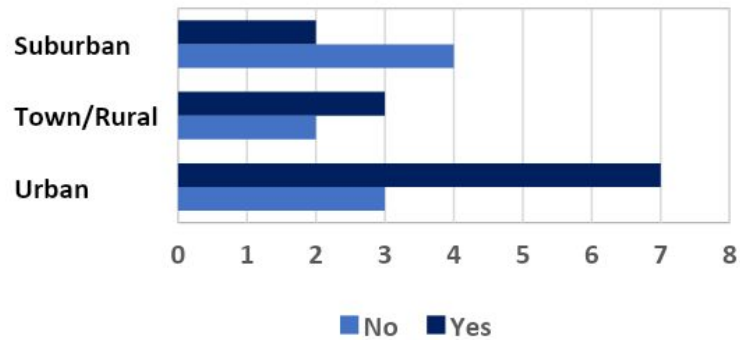
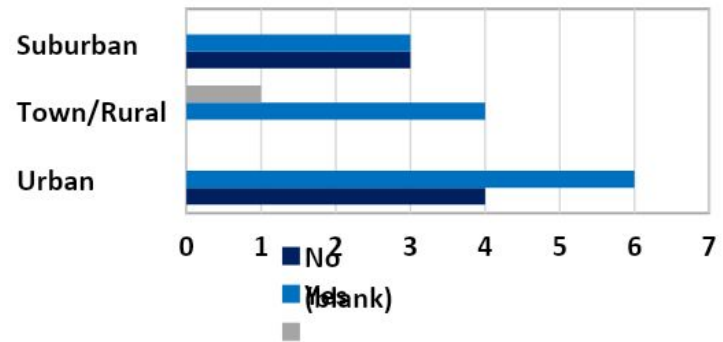Chart 9. LEAN Publishes Bid Policies Online by Geography

Chart 10 displays LEA responses by geography on the use of a template for bid reviews. Results show that 75% of Town/Rural LEAs (3 of 4 respondents) and 66% of Urban LEAs (6 of 9 respondents) reported use of a template for bid reviews. A third of Suburban LEAs reported using a template for formal bids.

Chart 10. LEA Use of a Template to Review Bids by Geography

Legend: No, Yes, (blank)
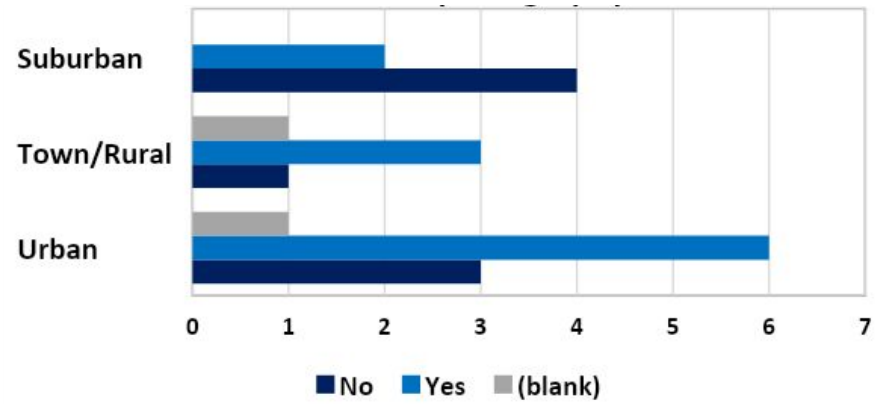
E. Contracts & Awards

Table 7 shows the importance LEAs assigned to price or cost of ownership, value, product quality, bid review results, vendor reliability, LEA needs, and contract compliance. Participants were asked to rank criteria used to inform purchasing decisions based on importance, where "5" is very important and "1" is not important. As Table 7 shows, participants ranked most criteria as very important.

| Table 7. Criteria Used To Evaluate Whether To Make An Award By LEA Type (N=21)*		
Criteria	Number	Mean
Price/Cost of Ownership	21	5.00
Value	21	5.00
Product Quality	21	4.90
LEA Needs	20	5.00
Bid Review Results	21	4.90
Vendor Reliability	21	4.86
Contract Compliance	20	5.00

* Missing Data – 1 Town/Rural Small LEA.

Table 8 details the length of time in weeks that it typically takes to receive approval for a purchase order after submitting the requisition. Responses are evenly distributed across approval times, with a total of 6, 7, and 8 LEAs taking less than a week, 1-2 weeks, or 3-4 weeks to process purchasing requests. Three-quarters of Town/Rural Small LEAs (3 of 4 respondents) reported that they approve purchasing requisitions in less than a week, while 60% of Suburban LEAs (3 of 5 respondents) approve purchase orders in less than a week, and 100% of Suburban (6 of 6 respondents) approve purchasing requisitions in 1-2 weeks or less. Sixty percent of Urban LEAs (4 of 6 Small LEAs and 2 of 4 Large LEAs) reported taking 3-4 weeks to approve purchase orders. Chart 11 and 12 illustrate the distribution of responses overall and by geography.

Table 8. Length of Time For Purchase Order Approval By LEA Type (N=21)

Purchase Order Approval Time:	Urban		Suburban			Town Rural		Total
	Small (N=6)	Large (N=4)	Small (N=1)	Medium (N=2)	Large (N=3)	Small (N=4)	Medium (N=1)	
< 1 week	1		1	1	1	3		7
1-2 weeks	1	2		1	2			6
3-4 weeks	4	2				1	1	8

Chart 11. Length of Review Process

N=8
N=7
N=6

- 3-4 weeks
- Less than a week
- 1-2 weeks
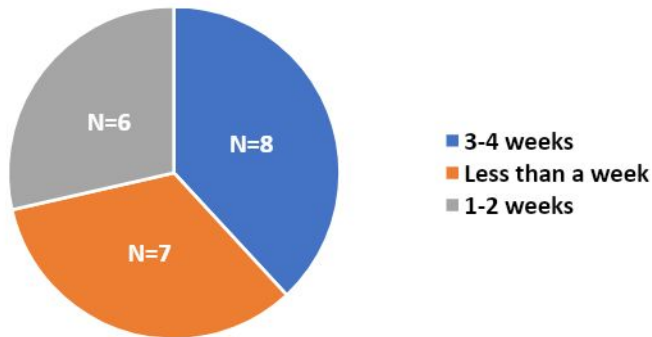
Chart 12. Length of Review Process by Geography
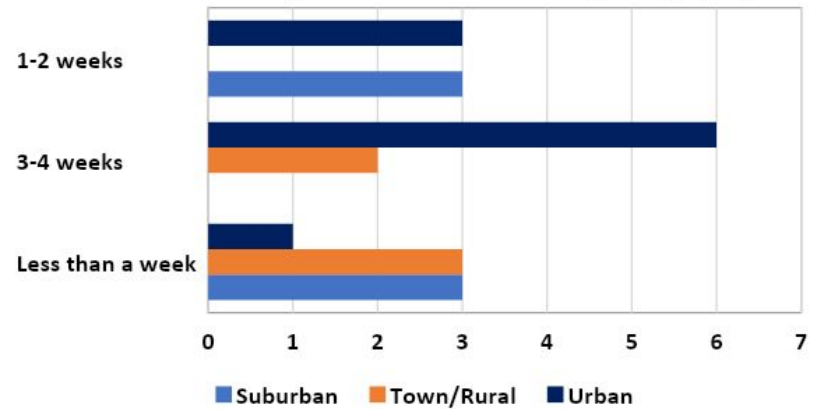

- Suburban
- Town/Rural
- Urban

Table 9 displays the results for how widely LEAs share bid results (See Chart 13 also). Only three LEAs reported notifying the winner only. All bidders" was selected most often, with 15 of 18 respondents selecting "All Bidders" alone or in combination with "Salesperson" and/or "Distributor". In terms of geography, 75% of Urban LEAs (6 of 8 respondents) and 60% of Suburban LEAs (3 of 5 respondents) indicating that "All Bidders" receive the bid results.

Table 9. Entities Who Receive Bid Results By LEA Type (N=18)							
Bid Results Provided To:	Urban*		Suburban			Town Rural**	
	Small*	Large	Small	Medium	Large	Small**	Medium
The Winner Only	1				1	1	
All Bidders	3	3	1	1	1	2	1
All Bidders & Salesperson				1			
All Bidders, Salesperson, & Distributor		1			1		

* Missing Data – 2 Urban Small LEAs   ** Missing Data – 1 Town/Rural Small LEA

Chart 13. Entities That LEAs Notifies of Bid Results

- All bidders
- The winner only
- All bidders, and the sales representative & distributor
- (blank)