

# Procurement During the Pandemic: Lessons Learned

*Procurement has had a front-row view of the pandemic's impact on school district operations.*

By Peter Weed



**F**rom ordering supplies and interacting with vendors to navigating reporting requirements for pandemic-related federal funding, school district procurement professionals have been at the center of the COVID-19 pandemic's administrative challenges.

In the best of times, procurement professionals have difficulty ensuring that processes from numerous sources meet funding guidelines. These sources sometimes send mixed messages and have conflicting and overlapping procedures. Staying informed of and adapting to changes in funding sources and restrictions while meeting the urgent needs of their organization are top challenges.

The pandemic has only magnified these and other challenges as school districts continue to navigate the Elementary and Secondary School Emergency Relief (ESSER) Fund with distinctions in its three versions and complex guidance and restrictions.

Fortunately, modern technology has created a seismic shift in streamlining procurement processes, which has helped school districts adapt during the pandemic. Procurement professionals in Texas's Irving Independent School District have learned much during the pandemic, and the lessons may prepare them and other school districts for future challenges.

## The Power of Cooperative Purchasing

During the pandemic, procurement departments have met the volume of out-of-the-norm purchases quickly to match the classroom transitions—including remote learning and facility reconfigurations. For the Irving Independent School District, cooperative purchasing and other expedited purchasing methods have played a critical role in helping the district meet its purchasing needs.

Irving belongs to several cooperatives. District purchases through the cooperatives satisfy requirements for seeking competitive bids. This arrangement saves the district time because it does not need to put purchases through its own bidding processes.

For certain purchases—such as Wi-Fi hot spots for distance learning or personal protective equipment, including masks, for in-person interactions—the cooperative process means the district, which has more than 33,000 students and 4,500 employees, did not need to go through a lengthy RFP (request for proposals) process to purchase.

Terry Martella, Irving’s purchasing supervisor, with 17 years in procurement, explains: “Cooperative purchasing allowed us to obtain vendor pricing and make purchases much more quickly. It saved time we would have spent on preparing and issuing RFPs and getting back bids.”

In fact, in an April presentation on procurement and COVID-19-related federal funding, representatives of the National Institute of Governmental Purchasing (NIGP) pointed to cooperative purchasing as a way to “foster greater economy and efficiency.”

## The Value of Digital Workflows

The transition to remote learning and administrative operations highlighted the value of technology to keep districts functioning. Heading into the pandemic, Irving’s transition to remote work was simplified because the district had already implemented paperless processes.

Irving’s e-procurement system simplified purchasing during a difficult period, enabling direct online ordering with several high-volume vendors. E-procurement also streamlined purchase and payment processes by connecting financial applications directly to online vendor resources, resulting in shorter processing times, more accurate records, and reduced data entry.

In addition, the district’s modern content management system played two key roles. First, it enabled paperless



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approvals through electronic signatures, with key documents accessible during the process. Second, it simplified report completion and audits, making the electronic documents easily accessible and associated with the relevant system records.

The NIGP has highlighted the importance of keeping supporting documentation of ESSER fund spending to support purchases during audits.

Based on her experience, Martella advises: “Make sure that your systems can provide what you need, from content management to contract management to bid management.”

## Contract Management During Supply Chain Disruptions

Procurement has had a front-row view of the pandemic’s impact on supply chains. Deliveries and product availability have been interrupted, and some costs have risen dramatically, which has been disruptive for bids and contracts.

“Deliveries are delayed, which can delay services. For example, you can’t get your roof fixed in the summer because a product won’t be available until October or

November,” says Jerome Pilgrim, Irving’s director of purchasing. “And this affects bids. Vendors are pulling out of bids that typically update annually because of cost increases. Bids need to be amended, terminated, or redone.”

The district found that contract management software—which captures bid documentation and streamlines the bidding process—was particularly useful during this period of uncertainty.

“One of the best things we did was to buy a contract management solution [before the pandemic], so all of our documentation is attached behind every purchase,” Martella says. “So if you have questions about a purchase, you have access in so many ways to be able to pull it up and view it online.”

The system also electronically enhanced the communications between both external and internal purchasing customers.

## The Importance of Clear Approval Processes

Electronic workflows make digital approvals and document retention possible; however, school districts still depend on the quality of their approval process. The pandemic has proved the value of a layered, clearly delineated workflow.

Martella points to Irving’s robust approval system: “Our approval process was key. It keeps people in their lane. Our employees knew what the process was. Our process is layered. Anybody, who has any buy-in for a department or a campus, and anybody responsible, knows the process. They have approval and are notified about approvals.”

The process has paid off, especially in the middle of the pandemic. Pilgrim attests: “The district went through two major audits during the pandemic. And it’s because we try hard, including prepandemic, to follow the procedures. We still continued to follow the procedures, which helped during the audit—we passed those federal audits during the pandemic.”

## The Importance of Proper Fund Coding

The ability to track purchases to the correct funding source, such as ESSER I, II, or III funds, depends on proper coding and processes. In the case of ESSER funds, each related purchase needs to be coded to the appropriate fund in the financial system. Effective systems provide reviews that ensure proper coding and route workflows and approvals specific to that coding.

“We make sure the funding code is correct for what they are buying,” Martella says. “That information is

going straight to our federal managers who are in charge of grants, so they are looking at every requisition that’s been entered, which is one of the first parts of that approval process.”

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Martella continues: “Because we have the approval process set up and layered appropriately, we feel certain that every step has been taken to ensure a successful purchase and that all stakeholders have done their part. We are the first conversation employees are having for what they are buying, and we are also the last step in providing a purchase order. We are telling them what procurement method they are going to use to purchase it, and the order goes through the process to make sure they have followed all of those guidelines.”

## Looking Past COVID-19

As the school district looks beyond the pandemic toward future challenges, it plans to make the most of difficult lessons.

Pilgrim’s takeaway is that employee training is a key part of preparing for the unexpected.

“Continue to train people in your processes and procedures,” he says. “That means even if we can’t be all together, we will still know the processes. We need to understand how technology works, VPN, electronic bidding, e-procurement—the tools that made remote work possible. Then, we are prepared if someone comes in the door and says pack up for two weeks. We should be able to grab our laptops and go home and work.”

While the role of technology continues to grow, Martella points to the importance of employees being committed to working together.

In the end, she says, success rests with teamwork. “It’s working cooperatively and having the same goal. In our purchasing department, there may only be seven of us, but we are a team backing each other up to get to our end goal.”

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