



California Independent
Schools Business
Officers Association

Cal-ISBOA Purchasing Partners Program Overview and Vetting Process

Cal-ISBOA is a trusted resource that connects business officers throughout the state. Our goal in developing a purchasing program is to identify and communicate options that deliver value to our member schools. We work with vendors to deliver cost savings, quality service, and improved terms and conditions. By leveraging our collective purchasing power, we can save our members time and money and reduce risk. This increases the value of the Cal-ISBOA membership.

Purchasing Program Benefits include:

- All vendors are thoroughly pre-screened in terms of quality of service as well as price.
- The purchasing task force reviews all vendors and approves all purchasing initiatives and resulting agreements.
- Commitment to group purchasing helps all schools benefit from special rates.
- Each vendor's performance is reviewed annually, and contracts are periodically re-bid.
- If a vendor does not meet the high standards set by task force, they will not be included in the re-bid process.

Members are under no obligation to use the approved vendor. We ask that members include them in their purchasing decision making process. Vendors' attractive pricing, service and knowledge of independent schools will provide members with a strong option.

Vetting Process:

Potential Purchasing Partner Program vendors are screened by the members of the Purchasing Task Force and their performance is reviewed annually to ensure that standards are maintained.

- The Task Force screening process includes: interviewing the main vendor contact, talking with current and past clients/customers with a concentration on Independent Schools, talking with current and past Associations with whom the vendor has worked, reaching out to any other known entities that work with Cal-ISBOA and independent schools with whom the vendor has professional relationships. This may include: audit companies, banks, and insurance brokers.

- The process may include one or more Task Force members or Cal-ISBOA members actually going through the bid process with the vendor.
- Contracts are negotiated and reviewed by the Task Force and include but are not limited to: discount to members, service standards, marketing fee paid to association, communication/outreach to members (process and approval).

The Purchasing Task Force is comprised of Cal-ISBOA Board Members as well as Cal-ISBOA member representatives.