



Friscisco ISD Purchasing Department Handbook

The Purchasing Department develops relationships with vendors to purchase goods and services needed by FISD using methods allowed by state and federal laws and local policy and procedures. Purchasing manages the procurement process district-wide, including contracts associated with the acquisition of goods and services to support the education, research, and business initiatives of Frisco Independent School District.

The FISD *Purchasing Desk Manual* includes standard procedures for Purchasing staff, who support FISD schools and departments in buying goods and services using the “purchase to pay process” in the *Business Services Training Guide*. It is used with TEA’s Financial Accountability System Resource Guide (FASRG) as it provides information about federal and state laws and FISD policy and procedures and promotes consistency in purchasing practices.

The Department updates its manual every two years to ensure changes in practice are documented and to address legislative or policy changes to purchasing regulations.

Contents

The *Purchasing Desk Manual* addresses the following items:

- Standards of conduct, including ethics and conflicts of interest
- Purchasing goals and objectives
- Relevant statutes, regulations, board policies, guidelines, and requirements
- Purchasing authorities within the school district
- The purchase to pay process (guidance purchase requisitions and purchase orders)
- Guidance on handling both minor (e.g., low dollar, quotes, spot purchases) and major (e.g., high dollar and/or complex solicitations) procurements
- Guidance on contracts
- Receiving requirements
- Purchase requisitions
- Purchase orders
- Bid or proposal forms

Annual Purchasing Ethics Statement

Purchasing staff review and acknowledge common procurement professionals’ standards of ethics annually. These standards are incorporated into all FISD purchasing functions. Procurement professionals are responsible for developing solid vendor relationships, encouraging open competition, and avoiding any favoritism in purchasing functions.

Ethical standards about conflicts of interest, financial interests in firms conducting business with FISD, accepting gifts or gratuities, or improper use of a position or confidential information are communicated to district staff by Purchasing, when needed. As purchasing professionals, we are aware of the penalties for violations of purchasing laws, which may include criminal prosecution and loss of employment opportunities. Because we exercise discretion in the recommending, selecting, and contracting with vendors, we are held to the highest standards. Staff must be familiar

with FISD Board of Trustee policies related to conflicts of interest and ethics.

Common Standards of Ethics

There are certain common standards of ethics that should govern the conduct of employees involved in the purchasing function, as follows:

- It is a breach of ethics to attempt to realize personal gain through public employment with a school district by any conduct inconsistent with the proper discharge of the employee's duties.
- It is a breach of ethics to attempt to influence any public employee of a school district to breach the standards of ethical conduct set forth in this code.
- It is a breach of ethics for any employee of a school district to participate directly or indirectly in a procurement when the employee knows that:
 - the employee or any member of the employee's immediate family has a financial interest pertaining to the procurement.
 - a business or organization in which the employee, or any member of the employee's immediate family, has a financial interest pertaining to the procurement; or
 - any other person, business, or organization with whom the employee or any member of the employee's immediate family is negotiating or has an arrangement concerning prospective employment is involved in the procurement.
- It is a breach of ethics to offer, give, or agree to give any employee or former employee of a school district, or for any employee or former employee of a school district to solicit, demand, accept, or agree to accept from another person, a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation of any part of a program requirement or purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim, or controversy, or other particular matter pertaining to any program requirement or a contract or subcontract, or to any solicitation or proposal pending before this government.

Acceptance of gratuities may be construed as a criminal offense.

- It is a breach of ethics for any payment, gratuity, or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor for any contract of a school district, or any person associated therewith, as an inducement for the award of a subcontract or order.
- The prohibition against gratuities and kickbacks prescribed above should be conspicuously set forth in every contract and solicitation, therefore.
- It is a breach of ethics for any employee or former employee of a school district knowingly to use confidential information for actual or anticipated personal gain, or for the actual or

anticipated gain of any person.

Laws and Violations

State law relating to violation of purchasing requirements imposes upon violators certain criminal penalties, which are found in the [Texas Education Code \(TEC\), §44.032](#), and the [Texas Local Government Code, §271.029](#).

[Texas Penal Code, Chapter 36](#), provides information about violations of corrupt influence. A public servant who exercises discretion in connection with contracts, purchases, payments, claims, or other pecuniary transactions of government commits an offense if he solicits, accepts, or agrees to accept any benefit from a person the public servant knows is interested in or likely to become interested in any contract, purchase, payment, claim, or transaction involving the exercise of his discretion. A person commits a Class A misdemeanor offense if he offers, confers, or agrees to confer any benefit on a public servant that he knows the public servant is prohibited by law from accepting.

References: [Texas Education Code \(TEC\), §44.032](#); [Texas Local Government Code, Chapter 171, Chapter 176, and §271.029](#); [Texas Government Code, §2155.062\(d\)](#); [Texas Penal Code, Chapter 36](#)

Purchasing Professionals Annual Ethic Statement

I, _____, certify I understand and agree to be bound by the commitments contained herein. I participate in FISD procurement processes as a Purchasing Department staff member.

I agree to not disclose any information I am aware of because of my involvement in any FISD decision-making or Board recommendation on a procurement that could constitute a conflict of interest or create the appearance of impropriety. I understand my relationship with an employee of a business entity that is or may be a respondent or subcontractor may constitute a conflict of interest when that employee is my spouse, child, spouse's child, parent, spouse's parent, child's spouse, brother, sister, grandparent, spouse's grandparent, grandchild, spouse's grandchild, spouse's sibling, sibling's spouse, nephew, niece, uncle, aunt, great-grandparent, or great-grandchild. A step-relationship or adoptive relationship is considered the same degree as a natural relationship. If, during any procurement process, I become aware of an actual, potential, or perceived conflict, I will immediately notify FISD.

I will not participate in any procurement if I have, or if I am aware that any member of my immediate family has, an actual, potential, or perceived financial interest in a procurement, including, but not limited to, employment or prospective employment, in a business or organization that may be a respondent or a subcontractor to a respondent. The term "immediate family," means: One's parents, spouse, children, brothers, and sisters, whether residing together or not.

I will not solicit or accept anything of value from an actual or potential vendor. If I receive a gift, solicited or unsolicited, from a vendor or potential vendor, I will follow FISD gift policies. When participating in procurements, I will act on my own accord and not act under duress. I will not participate in a procurement process if I am currently employed by, or receiving compensation from, or will be the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in return for favorable consideration of a vendor during a procurement process.

I will not let a preconceived position regarding the merits of a vendor affect fair, impartial performance of my duties, nor will I perform my duties based on personal preference regarding the worth or standing of any business. I will ensure solicitations provide all potential respondents equal and fair opportunity to submit a bid for evaluation, taking care to ensure specifications and evaluations are not intended to favor any respondent.

I will not disclose or otherwise divulge information pertaining to a procurement including, but not limited to, development of the solicitation, contents of response(s) received, ranking of response(s), or the procurement status, to anyone other than authorized FISD staff unless such communication is lawful and consistent with FISD's policy. I will follow FISD procedures for responding to information requests. I have reviewed this statement and FISD purchasing ethics prior to signing this document.

Signature: _____

Date: _____

Federal, State, and Local Purchasing Laws, Rules, Regulations, Policies, and Procedures

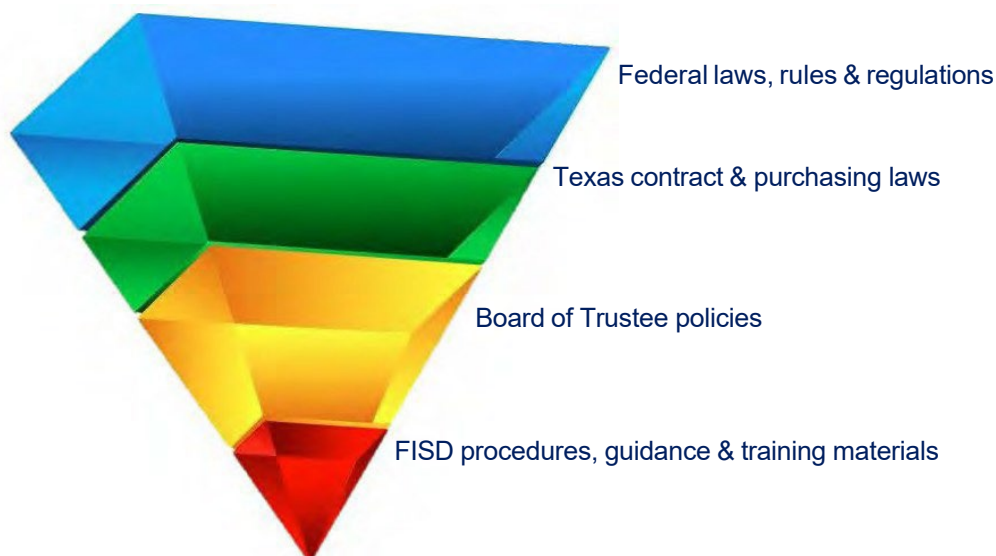


FIGURE 1: Federal and State Laws and Local Purchasing Policies and Procedures

Procedures, Manuals, Guidance & Training Materials

The following training guides and manuals govern Purchasing Department activities:

- *The Purchasing Department Desk Manual*
- *The Business Services Training Guide (Purchase to Pay Process)*

[Frisco ISD's Child Nutrition Purchasing Procedures](#) are incorporated into the Purchasing Handbook by reference. If information in local procedure manuals or training materials conflicts with FISD Board policy, Board policy governs the purchasing activity. If FISD training materials and procedure documents are silent on a purchasing or contracting procedure, Board policy and state and federal law govern the purchase.

Board of Trustee Policy

Trustee policies listed below are those specific to the responsibilities and functions of the Purchasing Department. The complete [FISD Board of Trustee policy book](#) is available on the FISD website.

LEGAL policies compile federal and state law and court decisions, supplying the statutory context in which all other policies should be read. LOCAL policies reflect decisions made by the Board of Trustees. If any information in FISD Board of Trustee policy conflicts with state and federal law, state and federal law takes precedent. IF FISD Board policy is silent on a purchasing or contracting procedure, state and federal law should guide purchasing.

[CH\(LEGAL\) Purchasing and Acquisition CH\(LOCAL\) Purchasing and Acquisition](#)
[CHE\(LEGAL\) Purchasing and Acquisition: Vendor Relations](#)
[CJ\(LEGAL\) Contracted Services](#)
[CJ\(LOCAL\) Contracted Services](#)

[CJA\(LEGAL\) Contracted Services: Criminal History](#)
[CJA\(LOCAL\) Contracted Services: Criminal History](#)
[COA\(LEGAL\) Food and Nutrition Management: Procurement](#)
[COA\(LOCAL\) Food and Nutrition Management: Procurement](#)
[CVA\(LEGAL\) Facilities Construction: Competitive Bidding](#)
[CVA\(LEGAL\) Facilities Construction: Competitive Bidding](#)
[CVB\(LEGAL\) Facilities Construction: Competitive Sealed Proposals](#)
[CVB\(LEGAL\) Facilities Construction: Competitive Sealed Proposals](#)
[CVC\(LEGAL\) Facilities Construction: Construction Manager-Agency](#)
[CVD\(LEGAL\) Facilities Construction: Construction Manager-At-Risk](#)
[CVE\(LEGAL\) Facilities Construction: Design-Build](#)
[CVF\(LEGAL\) Facilities Construction: Job Order Contracts](#)

State Laws

The following Texas laws govern local government and school district purchasing and contracting activities. If state law conflicts with federal laws, federal law takes precedent. If state law is silent on any purchasing and/or contracting activity, federal law will preside over the action.

[Texas Administrative Code \(TAC\) 109.41](#) The [Financial Accountability System Resource Guide \(FASRG\)](#) is adopted by TAC 109.41. The rules govern Texas public schools and charter schools. FISD is required to follow all rules stated in FASRG (mandatory).

[Texas Education Code \(TEC\) Title 2 Chapter 44 Subchapter A: School Finance and Fiscal Management: School District Fiscal Management](#)

[Texas Government Code \(TGC\) Title 7 Chapter 791 Subchapter A: Intergovernmental Relations: Interlocal Agreements, General Provisions](#)

[TGC Title 10 Subtitle F Chapter 2254 Subchapter A State and Local Contracts and Fund Management: Professional and Consulting Services, Professional Services](#)

[TGC Title 10 Subtitle D Chapter 2155 Subchapter A: Purchasing General Rules and Procedures: General Provisions](#)

[TGC Title 10 Chapter 2157 Subchapter A: State Purchasing and General Services: Purchase of Automated Information Systems, General Provisions](#)

[TGC Title 10 Subtitle F Chapter 2269: State and Local Contracts and Fund Management: Contracting and Delivery Procedures for Construction Projects, General Provisions](#)

[Texas Local Government Code \(TLC\) Title 5 Subtitle C Chapters 171, 176, 271](#) addressing conflicts of interest of officers, disclosure of certain relationships with local government officers, providing public access to certain information, state purchasing program, and purchasing and contracting authorities of certain local government entities.

[Texas Penal Code Chapter 36: Bribery and Corrupt Influence](#)

Federal Laws, Rules & Regulations

[2 CFR 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards](#)

Annual Aggregating of Expenditures

Aggregate

The term “aggregate,” used in TEC §44.031(a), means the total expenditures for similar goods and services that in normal purchasing practices would be made as one purchase over a 12-month period (July 1 to June 30).

Commodity Codes. Frisco ISD uses United Nations Standard Products and Services Codes (UNSPSC) for tracking like or similar categories of purchases.

General Ledger. Purchasing also reviews general ledger data to make logical data-driven decisions about purchase methods.

Annual review for planning purposes. The Department reviews one complete fiscal year’s expenditures (commodity codes and general ledger expenditure data) to identify purchase categories for which the total purchased was below the simplified acquisition threshold (SAT). We use this information to identify small purchases and formal solicitations in the upcoming year (TEC §44.031).

Periodic review. Purchasing reviews all District purchases of “like-items” (commodities) quarterly to ensure purchases in any category do not exceed \$50,000 and that our estimated spend is accurate.

When a requisition is submitted for an “under \$50K” purchase the vendor team reviews a combination of expenditure data and commodity codes to determine total spend. If the aggregate expenditures for a commodity category is under \$50,000, the requisition is processed. If expenditures are more than \$50,000, the vendor team must try to find a legal, proper purchasing method. The review of aggregate expenditures is attached to the vendor record in eFin. As needed, the vendor team sends information to the bidding team, who must prepare for issuing a formal competitive bid for the goods and/or services.

The District continues to grow at a rapid pace, so vendors are advised their status as an "under \$50K" vendor is temporary and the entity should respond to an FISC solicitation in the near future or risk not being able to sell goods and services to the District.

Competitive (Formal) Bidding: Purchase of \$50,000 or More

TEC §44.031 (a) requires all District contracts for the purchase of goods and services valued at \$50,000 or more in the aggregate for a 12-month period be made by the methods providing best value to the District. The rule does not apply to contracts for the purchase of produce or vehicle fuel. (Please note, a contract and a purchase order function like contracts binding FISC to pay for goods and services purchased.)

This means a purchase of like or similar goods and services that we estimate will be more than \$50,000 in a fiscal year (FY) must be bid or purchased through a purchasing cooperative that follows the same state and federal laws as those FISC must follow.

Purchasing is responsible for monitoring the compliance of purchases to the bid laws and the District’s purchasing procedures. In addition, we are responsible for developing procedures to promote full competition among vendors because, generally, competition is required by law. [TABLE 1](#) below lists the seven, competitive and noncompetitive, allowable purchasing methods for purchases of \$50,000 or more (TEC §44.031). We consider these methods for purchases of \$50,000 or more “formal” procurement methods. Additional information about purchasing methods is included in the Purchasing Methods Definitions section of our manual.

TABLE 1: TEC §44.031 PURCHASING METHODS

Method	What is it used for?	Competitive/ non-competitive
Competitive bidding	Services other than construction services	Competitive
Competitive sealed proposals	Services other than construction services	Competitive
Request for proposal	Services other than construction services	Competitive
Interlocal	Goods and services other than construction from a state agency, a unit of local government, or school district	Non-competitive
Methods from TGC 2269	Construction services	Competitive
Political subdivision corporation	Electricity	Non-competitive
Reverse Auction	Services other than construction	Competitive

Quotes (Informal) Bidding (Under \$50K Spend)

Frisco ISD opted to self-certify purchases under \$50,000 to TEA. As stated in TEA guidance, we have developed our own internal requirements to ensure we fulfill all requirements for purchases under the simplified acquisition threshold. Questions about the self-certification process should be directed to the Compliance Department. [TABLE 2](#) summarizes Frisco ISD quote requirements.

TABLE 2: QUOTES

Purchase Amount	Document(s) Needed	Rule
\$0 to \$4,999	No quote	FISD policies & procedures
\$5,000 to \$49,999	1 quote	FISD policies & procedures
\$50,000 or more	2 quotes & Best Value Form	TEC §44.031

Federal agencies, such as the Department of Education, require a district receiving federal funds to use one set of policies and procedures for purchasing, regardless of whether the funds are federal, state, or locally contributed. Purchases from other funding sources should be made using the same quote rules as those applicable to federal funds.

[Review of Required Quotes.](#) Quotes must be attached to a purchase requisition in e-Finance when submitted. Purchasing reviews the documentation to ensure that the appropriate number of quotes

are attached to a requisition and a Best Value form is added, if required. (See Purchasing Department internal procedure for requisition review and approval).

Additional Considerations

- A purchase made from a vendor awarded through a competitive FISD bid fulfills the competitive bidding requirement. Competitive bid means only one vendor was awarded. No additional quotes are needed. You must review the list of competitive, line item or Job Order Contract (JOC) bids to determine competitive qualifications. If not on one of these FISD bid types, get quotes.
- A purchase made from a vendor that is a member of an EDGAR-compliant purchasing cooperative fulfills the competitive bidding requirements, but end users must get quotes to meet Frisco ISD requirements.
- A purchase of \$50,000 or less from a vendor not on a FISD bid or not a member of a purchasing cooperative must meet the quoting requirements. **The Vendor Team is responsible for vetting the District's aggregate spend for like or similar goods or services when an "under \$50K" spend is initiated.** FISD's Board of Trustees must approve contracts of \$100,000 or more and are notified of purchases of \$100,000 or more. Purchasing may ask for additional quotes or other information from FISD staff to document we have completed our due diligence process on large purchases that go to the Board of Trustees. Purchasing staff may facilitate requests for written quotes for large purchases as part of our due diligence (the investigation or exercise of care that a reasonable business or person is normally expected to take before entering into an agreement or contract with another party. It can be a legal obligation, but more commonly is a voluntary investigation).

Non-Competitive Purchases

Purchasing reviews and approves certain purchases as non-competitive based on information included in FASRG, Module V, Section 5.10. A non-competitive purchase under FASRG 5.10 is not the same as a sole source purchase. Follow Purchasing's procedures for approving sole source vendors when reviewing purchase requests for goods and/or services available from only one vendor. More information on non-competitive purchases is in the [Purchasing Methods Definitions](#) section below.

Generally, Non-competitive purchases allowed under FASRG 5.10 are less than \$50,000 in the aggregate for a 12-month period. Additional review and consideration are needed if FISD will spend \$50,000 or more with one vendor or if the aggregate expenditures for a 12-month period will be \$50,000 or more. FISD considers the following purchases as non-competitive (*FASRG 5.10*, pgs. 27-29):

- Purchase of Services from A Unit of State and/or Local Government
- Memberships for Professional Organizations
- Assemblies, Seminars, Workshops
- Conferences
- Subscriptions
- Field trips
- Venues for Students and/or Extracurricular Events

Purchasing Methods: Definitions

[Sole Source Purchases](#)

Sole source purchases are non-competitive procurements that allow a single supplier to provide a product or service to FISD. They are exempt from competitive procurement requirements in TEC 44.031. (See the Sole Source Purchase Approvals section below for more information). [Texas Education Agency \(TEA\)](#), [defines a sole source](#) as an individual or company with the following:

- An item for which competition is precluded because of a patent, copyright, secret process or monopoly
- A film or manuscript
- A utility services
- A captive replacement part or component for equipment

TEA states that when considering a sole source, whether an item or service is covered by a patent or copyright is only one factor in determining if the purchase falls under a sole source exemption. Ultimately, there must be no other product or service available for purchase that serves the same purpose or function.

In past years, several of our vendors have claimed sole source status, especially software, subscription, databases, and professional development vendors. In many cases, the vendors consider themselves a sole source because they tailor their products and/or services to Frisco ISD. However, under the legal definition, this does not make them a sole source.

As both state and federal regulations have become stricter, we are updating our purchasing procedures to ensure we are legally able to justify procurement methods. The Purchasing Department routinely reviews and vets the status of active sole source vendors. If it is determined that they do not qualify as a sole source, staff encourage them to register through the District's e-bidding website, <https://fisd.ionwave.net/>. Registration permits vendors to receive notifications about current and upcoming bids. The vendor will then have the option to respond to requests for proposals, enabling FISD to secure a legally compliant procurement method.

Interlocal Agreements (via EPCNT, CTPA, CCGPF, other government units)

An Interlocal contract is created when one local government contracts or agrees with another local government to provide a governmental function or service. FISD currently has an interlocal contract/agreement with 2 major entities encompassing north Texas and central Texas ISD's (the Educational Purchasing Cooperative of North Texas, the Central Texas Purchasing Authority, the Collin County Governmental Purchasers Forum). The FISD Board of Trustees has elected to allow interlocal sharing with other districts through these groups. Contracts awarded by other ISD's are made available to FISD (and vice versa) by way of including language in bid awards that enable pricing awarded from the bidding process to be shared amongst other local governments. For a complete list of ISD's which FISD can utilize awarded contracts with, please contact robersonj@friscoisd.org.

Purchasing Cooperatives

If a school district participates in an EDGAR-compliant cooperative purchasing program, the district satisfies any law requiring it to seek competitive bids. Cooperative purchasing power can provide many benefits but most importantly, it offers purchasing opportunities that may not be made available to FISD on a singular basis. Cooperatives release bids on behalf of their member district to secure exclusive pricing through bid awards. Vendors compete in pricing, and Co-Op bid or RFP fosters competition among a large pool of vendors to ensure FISD receives best value. FISD participates in the following cooperative purchasing programs.

- 1 GPA (1 Governmental Procurement Alliance)
- BuyBoard
- Central Texas Purchasing Alliance (CTPA)
- CP (Choice Partners) / HCDE (Harris County Department of Education)
- DIR (Department of Information Resources)
- E & I (Educational and Institutional)
- Education Service Center - Region 3
- Education Service Center - Region 8 (TIPS)
- Education Service Center - Region 10 (MRPC)
- Education Service Center - Region 11
- Education Service Center - Region 12
- Education Service Center - Region 19 (Allied State)
- Education Service Center - Region 20 (PACE)
- Education Purchasing Cooperative of North Texas (EPCNT)
- General Services Commission (GSA)
- HGAC Buy (Houston Galveston Area Council Buy)
- NCPA
- NJPA / Sourcewell
- NPPGov
- Omnia / NIPA / TCPN / US Communities
- Purchasing Cooperative of America (PCA)
- Tarrant County Purchasing Cooperative
- TASB Energy Cooperative
- Texas Facilities Commission (TFC)
- TX SmartBuy

Purchasing Cooperatives and Competition. A purchase made through an EDGAR-compliant purchasing cooperative generally satisfies any law requiring it to seek competitive bids. FISD can adopt additional procedures governing purchases made by this method.

Although purchases through Co-Ops generally do not require securing additional quotes because FASRG states these purchases fulfill competition requirements, FISD staff may request additional quotes, as needed, to ensure purchases are of best value.

- Purchases of products and/or services of \$100,000 or more
- Purchases of new products and services never used by FISD before
- Purchase for critical, high-priority projects
- To fulfill requirements of guarantors

Professional Services

Professional services are those services identified in TEC and TGC that are not necessarily evaluated based on “best price”, but instead evaluated for the quality and level of service that each professional provides. Though no formal definition of “professional services” exists in the statutes, TEC §44.031, and TGC Chapter 2254 and Chapter 2269, identify specific services that are considered professional services.

The following are the individual professions identified within the specific statute.

TEC §44.031(f)

- Certified public accounting
- Fiscal agent
- Financial consultant
- Attorney
- Technology consultant

TGC §2254.002(2)(B)

- Licensed real estate appraising
- Nursing
- Medicine
- Optometry
- Landscape architecture
- Architect
- Engineer
- Land surveyor

TGC §2269.057 and §2269.058

- Architect
- Engineer
- Construction material engineering, testing and inspection services

FISD Bids

These vendors are those that have responded to and awarded under a current FISD bid released by Purchasing. Vendors register in Ion ware (FISD's E-bidding System) and respond to bids by submitting pricing for items and agreeing to certain terms, conditions, and legal clauses. These vendors have satisfied the legal requirement of competitive bidding by way of being awarded by the Board of Trustees after responding to a Request for Proposal or other bidding opportunity allowable by law. For more information regarding the process and how to refer vendors, see <http://www.friscoisd.org/departments/procurement/becoming-a-vendor>

Non-Competitive Purchases

This category includes purchases of less than \$50,000 listed in FASRG 5.10. If the aggregate expenditures for these items or like items these is \$50,000 or more annually, further documentation may be needed, up to and including the release of RFP to legally purchase the goods and/or services. FASRG 5.10 provides the following details:

- Governmental Entity: An expertise/service only available through a governmental entity and an interlocal agreement does not exist, whether local, state, or federal, where FISD must comply with certain legal requirements. If the total amount of the interlocal agreement will be \$50,000 or greater annually, FISD should sign a formal interlocal agreement. Review [3.17 Interlocal Agreements](#) for more information.
- Professional Organization: An FISD employee pays for membership to a professional organization, registration fees related to school business, or fees associated with UIL or other

school related competitions. If the total amount paid to a single organization will be \$50,000 or more annually, FISD may consider having the administration provide a letter of justification as to why FISD selected this organization over other organizations, if applicable.

- **Assembly, Seminar, or Workshop:** A school or department hosts a uniquely designed or copyrighted assembly, seminar, or workshop conducted by an individual who is not an employee of FISD (see above) and is trained in a specific discipline or area of expertise. The school or department must pay a fee to host the event. If the total amount of expenditures for like or similar assemblies, seminars, or workshops is \$50,000 or more annually, the district will be required to follow the [TEC, §44.031](#).

FISD will allow staff to purchase materials required to host a conference or participate in an assembly, workshop or seminar, if these participant costs are not incorporated into the total cost of the assembly, workshop, or seminar charged by a vendor providing the event on a limited basis.

FISD will allow limited purchases of direct instruction or student services materials by attending staff to implement strategies learned at the assembly, seminar, or workshop into instruction or service delivery.

- **Conference Attendance:** FISD staff attend a conference, assembly, seminar, workshop, or training session related to school business or job skills in a specific or unique discipline and must pay a fee to host or attend. If the total amount of the conference attendance by staff or if multiple conferences are provided by a single organization is \$50,000 or more annually, FISD may consider having administration provide a letter of justification as to why FISD selected this conference or provider over other conferences and providers, if applicable.

Staff can purchase materials required to participate in a conference, if the materials are not included in the conference registration price on a limited basis (under \$3,500) to implement strategies learned at the conference.

- **Subscriptions:** Subscription fees to professional publications needed in the performance of duties or educational requirements.
- **Field Trips:** Field or student trips to specific locales or one-time, limited events. (Please review the field trip processing procedure in the purchasing desk manual, as well.)
- **Venue(s):**
 - **Student:** A facility's location makes it prohibitive to go to another less conducive location further away from the school or facility. (Examples include swim facilities and golf courses.) If the total amount of the venue by students at a specific facility or location will be \$50,000 or more annually, the district will be required to follow the [TEC, §44.031](#).
 - **Extracurricular:** Based on availability or schedule, a rental property, facility, or location is chosen when other locations are unavailable or are not conducive to the needs of FISD. (An example would be a facility for graduation ceremonies and venue maximum capacity). If the total amount of the facility or location will be %50,000 or more annually, FISD may consider having administration provide a letter of justification as to why FISD selected this facility/location over other facilities/locations, if applicable.

Sole Source Procedure and Approvals

FISD accepts all funds sourced from local, state, and federal origins. Per EDGAR guidelines, school districts shall follow the most restrictive policy when purchasing goods and services. Therefore, FISD will

follow federal guidelines as it pertains to ALL sole source justifications across local, state, and federal expenditures.

Sole Source Guidelines

FISD will allow purchases to be made via sole source designation with local funds only provided appropriate research and documentation is performed (see below for steps required in approval of sole source exceptions). For these purchases, a notarized district sole source affidavit will be required. Texas Education Code Subchapter B, Sec. 44.031, provides the following requirements to accept sole source affidavits as justification for local funds:

1. A patent, copyright, secret process, or monopoly
2. A film, manuscript
3. A utility service including electricity, gas, or water
4. A captive replacement part or component for equipment

The exceptions do not apply to mainframe data-processing equipment and peripheral attachments with a single-item purchase in excess of \$15,000.00. FISD's preference is to limit sole source exceptions. Furthermore, attempts will be made to seek alternative methods of procurement for all vendors claiming sole source designation, or those vendors previously allowed under such exception, regardless of fund expenditure.

For purchases using federal funds, sole source letters or sworn affidavits WILL NOT be accepted.

TEA defines non-competitive (sole source) purchases as a procurement through solicitation of a proposal from only one source and may be used only when one or more of the following circumstances apply:

- The item is available only from a single source
- The public emergency for the requirement will not permit a delay (an unforeseen catastrophe or emergency that threatens the health, safety, or welfare of students, or damages school equipment or facilities {*FASRG Module 5, 5.32.1*})
- The federal awarding agency entity (TEA) expressly authorizes non-competitive proposals in response to a written request from a non-federal entity
- After solicitation of several sources, competition is deemed inadequate

For all fund expenditures, unless a vendor or purchase has met one of these qualifications released by TEA, the vendor or purchase should be further investigated.

Approval of Sole Source Vendors (FIGURE 2 below)

1. A buyer receives a notice via Eduphoria that a campus would like to purchase supplies or services from a vendor claiming sole source.
2. The buyer will check to see if this vendor is already set up in E-Fin and available for use. If already set up, the buyer will deny the request with instructions to move forward with the purchase using the already established vendor number.
3. If the buyer is unable to locate a vendor number or valid method of procurement (existing RFP award with FISD, existing RFP award with another ISD, existing RFP award with purchasing cooperative) the buyer will need to adhere to the requirements listed by 44.031 for a vendor or purchase to be classified as a sole source. If they do not meet those initial requirements, a denial email needs to be sent back for the request. The buyer should

notify the Procurement team to work on a long-term solution.

4. If not already working with the vendor, loop the Contract and Vendor Administration team (Vendor Team) to assist in vetting all sole source designations.
5. A member of the Vendor Team will reach out to the vendor, requestor, and others to determine how to classify the pending vendor. Vendor Team members should follow the bullets below to perform adequate research needed to qualify a vendor for sole source exception:
 - Email the vendor to check for possible alternative purchasing methods (RFP awards with other ISDs or Coops).
 - Via Google search, is this product obtainable from another source?
 - Via Google search, is there any other similar product available?
 - Is the requestor using local funds for the purchase?
 - If using local funds, request a notarized copy of FISSD's affidavit be submitted from the vendor.
 - If using federal funds, an affidavit will not be accepted as TEA must recognize this vendor as a sole source vendor. The Vendor Team member will need to work with requesters to determine possible alternatives or qualify this purchase via other methods.
 - Were there multiple quotes submitted by the requestor that can validate sole source applicability?
6. If none of these fit, it is possible that the Vendor Team can perform an informal bidding request via Buyboard or IonWave. A Vendor Team member will send out quote requests to a specified list of awarded vendors within one of the systems. The Vendor Team member will set a specific duration depending on the specific situation in which responses will be accepted. From there, the requests need to be checked for lack of competition and/or perceived quality. If acceptable, the Vendor Team member can move forward with a similar exception and on to the next step.
7. After a qualification can be made, the Vendor Team member will create a purchase justification document containing subject matter of major findings from most financial audits (Criteria, Condition, Cause, Effect, and Corrective Action) and attach to any subsequent requisitions that are processed for the vendor. This is a required document for each purchase regardless of fund. Template examples can be found in the Google drive.
8. All vendors deemed to have sole source justification must be tracked and ideally moved to bids that give future authority without need for additional documentation. The Vendor Team member will access the spreadsheet found in the Google drive to update purchasing's records of current sole source vendors.
9. Template response emails on official FISSD letterhead should be sent to the vendor, by the Vendor Team member, to notify the vendor of their current status and FISSD's preference to limit sole source exceptions. Instructions will be provided to the vendor to register on IonWave (FISSD's e-bidding system). Additionally, suggestions can be made to the vendor for possible alternative purchasing methods, along with information on accessing bids with FISSD and others to prevent the possibility of losing business with FISSD.

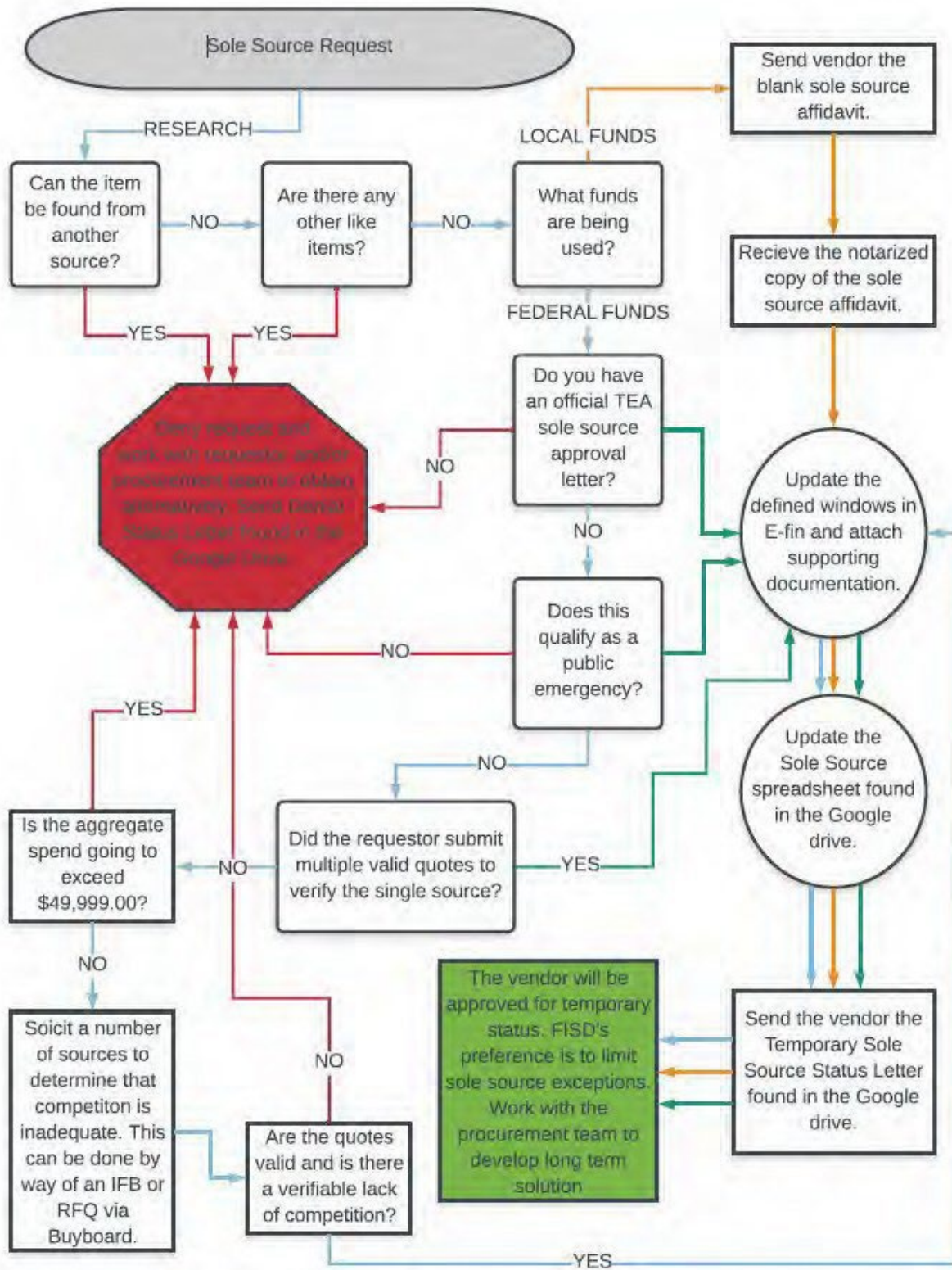
Approval of Requisitions from Sole Source Vendors

1. A buyer reviews a purchase requisition and upon accessing the vendor's information in E-fin sees that the method of procurement listed is only available via sole source.
2. The buyer will contact the Vendor Team to reach out to the vendor to see if there is any other applicable method of procurement available to FISC (existing RFP award with FISC, existing RFP award with another ISD, existing RFP award with purchasing cooperative). The Vendor Team member will need to adhere to the requirements listed by 44.031 for a vendor or purchase to be classified as a sole source. If they do not meet those initial requirements, a denial email needs to be sent back for the request. Template examples can be found in the Google drive. The Vendor Team member should ask Bidding to work on a long-term solution.
3. If an alternative method is available, a member of the Vendor Team will update the defined windows and remove sole source from the available options.
4. The Vendor Management team member will notify the buyer that the vendor has been updated. If the purchase is valid using the contract/award previously located by the Vendor Team member, the purchase requisition will be scanned for correct coding and formatting by the buyer. If all is acceptable, the buyer will approve and convert the requisition to a purchase order.
5. If no alternative method is located, the Vendor Team member will validate the existing sole source using the below steps:
 - Email the vendor to check for possible alternative purchasing methods (RFP awards with other ISDs or Coops).
 - Via Google search, is this product obtainable from another source?
 - Via Google search, is there any other similar product available?
 - Is the requestor using local funds for the purchase?
 - If using local funds, request a notarized copy of FISC's affidavit be submitted from the vendor.
 - If using federal funds, an affidavit will not be accepted as TEA must recognize this vendor as a sole source vendor. The Vendor Team member will need to work with requesters to determine possible alternatives or qualify this purchase via other methods.
 - Were there multiple quotes submitted by the requestor that can validate sole source applicability?
6. If none of these fit, the Vendor Team can perform an informal bidding request via Buyboard or IonWave. A Vendor Team member will send out quote requests to a specified list of awarded vendors within one of the systems. The Vendor Team member will set a specific duration depending on the specific situation in which responses will be accepted. From there, the requests need to be checked for lack of competition and/or perceived quality. If acceptable, the Vendor Team member can move forward with a similar exception.
7. After a qualification can be made, the Vendor Team member will create a purchase justification document containing subject matter of major findings from most financial audits (Criteria, Condition, Cause, Effect, and Corrective Action) and attach to any subsequent requisitions that are processed for the vendor. This is a required document

for each purchase regardless of fund. Template examples can be found in the Google drive.

8. All vendors deemed to have sole source justification must be tracked and ideally moved to bids that give future authority without need for additional documentation. The Vendor Team member will access the spreadsheet found in the Google drive to update purchasing's records of current sole source vendors.
9. Template response emails on official FISD letterhead should be sent to the vendor, by the Vendor Team member, to notify them of their current status and FISD's preference to limit sole source exceptions. Instructions will be provided to the vendor to access and register within IonWave (FISD's e-bidding system). Additionally, suggestions can be made to the vendor for possible alternative purchasing methods, along with information on accessing bids with FISD and others, to prevent the possibility of losing business with FISD.

Figure 2: Sole Source Approval Workflow



FISD Bidding

Purchasing is responsible for coordinating competitive bidding and recommendation to award vendor bids for campuses and the administrative offices. We oversee the complete process for District bids and proposals except for FF&E and construction projects, which is coordinated by the Operations and the Construction Department. We refer to this process as an FISD bid. It involves:

- Intake of requests to purchase goods and services from staff.
- Evaluating whether an informal or formal procurement process is needed based on State and Federal law.
- Developing requests for quotes, bids, and proposals in collaboration with FISD subject matter experts.
- Scheduling the timeline for the solicitation.
- Assisting in preparation of the bid/proposal documents and specifications.
- Distributing requests for bids/proposals to interested vendors.
- Receiving quotes, bids, and proposals.
- Determining whether vendor submissions are responsive.
- Assisting in the analysis of the vendor bid/proposal documents received; and
- Preparing the qualification recommendation to be submitted for School Board approval.

Once the bid/proposal has been awarded, notification is sent to the qualified vendor(s) and District purchase orders are processed to place orders with the Board qualified vendor.

The preferred method to submit a proposal or bid is online through Ion Wave, a database bidding management system used to maintain vendor information and to execute the bidding process. Proposals may also be submitted via the postal service or dropped off in person prior to the bid close date. Buyers must monitor mail received to ensure we include any hard copy bids in the RFP process.

The FISD Bid Work Plan for the bidding process is included as [ATTACHMENT 1](#).

Intake and Evaluation of Purchase Methods

Bidding Team members (Buyers) vet requests from FISD staff to purchase goods and services to support the education, research, and business initiatives of the District.

1. The Buyer is contacted by FISD staff for technical assistance and support related to procurement.
2. The PB identifies:
 - A. The anticipated dollar value of the purchase
 - B. If FISD has a current vendor that can provide like or similar goods and services
 - C. If the purchase can be made through an EDGAR-compliant purchasing cooperative
 - D. If the product of service staff needs to purchase available only from one source. (If the item is a sole source purchase, follow the Department's sole source purchase procedure.)

The preferred method of securing a new vendor for a product or service that FISD does not have an available vendor for is through an EDGAR-compliant purchasing cooperative. This is in part because of the time required to issue, evaluate, and award a new bid.

3. The Buyer evaluates intake information to determine the procurement method required. See Purchasing Methods: Definitions in the Purchasing Department procedures.

Developing Solicitation Documents and Schedules

4. The Buyer is responsible for developing a schedule of the bidding process for schools and administrative departments. The bidding schedule concludes in providing the FISD Board of Trustees a recommendation to award agenda items. The Buyer determines the date that the bid will be presented to the Board for approval. Based on the Board approval date, the Buyer establishes the dates that steps in the bidding process should be completed.
5. The Buyer uses the FISD Bid Work Plan to collect information needed for a new FISD Bid.
 - A. The Buyer uses information from the Bid Work Plan to draft a scope of work or bid specifications, to include:
 - Services and products needed
 - Technology Department support needed
 - Limitations of the scope of work
 - Student or other confidential data that a vendor may have access to
 - Delivery requirements
 - Order requirements
 - Invoicing requirements
 - Certification/licensing requirements
 - Specific attributes
 - Standard attributes
 - B. The Buyer will work with campus or department staff to develop evaluation criteria for the new FISD Bid.
 - C. The Buyer collaborates with staff to identify the need for other additional documentation the vendor must provide to be considered responsive to an FISD bid to include additional information needed to evaluate bids.
 - D. The Buyer collaborates with campus or department staff to identify a minimum of three evaluators and alternates who will evaluate vendor proposals/bids.
 - (1) The Buyer sends the FISD Non-Disclosure Agreement to all FISD staff participating in the development, release, evaluation, or award of a vendor bid. The NDAs must be signed and returned before any vendor bids are released for evaluation. Signed NDAs are attached to the FISD Bid Calendar in Smart Sheets as a holding place until the bid closes in IonWave. The Buyer will then move the documents to the closed bid in Ion Wave as an attachment.
 - (2) The Buyer sends FISD Evaluator Guidelines to each identified evaluator. The Guidelines must be signed and returned before vendor bids are released to evaluators. They are attached to the SmartSheets FISD Bid Calendar as a holding place until the bid closes. After the bid closes, they should be attached to the bid in Ion Wave.

- (3) Upon receipt of the NDA and Evaluator Guidelines the Buyer should add new evaluators to the “Evaluator Familiar with Process” form.
https://docs.google.com/spreadsheets/d/1hnsy2Q1cU_cKq2B3MMz2ol6Q3h52uOPoL5R-kU9NdBl/edit?usp=sharing
6. The Buyer requests potential bidder information from campus and department staff during the planning period. The Buyer must have email addresses of potential vendor point of contacts to send potential bidders’ information about registering in Ion Wave’s supplier portal and responding to bids.
 7. The Buyer prepares the timeline and sends it to campus and/or department staff via email. The email contains the following date deadlines:
 - Time bids will be posted online
 - Date bids will be accepted
 - Time bids will be submitted to the requestor for review and approval
 - Date evaluations/recommendations should be returned to Purchasing.
 8. The Buyer drafts the bid opportunity in Ion Wave. Bid invitations on Ion Wave include template standards, which include State required items like a conflict of interest questionnaire.
 - The Buyer determines whether the opportunity will be an extended opening in which we accept and evaluate bids on a rolling basis.
 - The Buyer determines whether the options to extend will “auto-renew”.
 - The Buyer determines whether the bid will be a Multiple Service Award (MSA) or Catalog bid for which several service providers will be awarded to meet the needs of FISD campuses and departments. If the bid will be an MSA or Catalog bid, the Buyer includes that information in the bid and notifies the Director of the MSA or Catalog bid opportunity. The Director must draft a memo justifying the MSA or Catalog bid. The memo is attached to the bid record on the FISD Bid Calendar.
 - If the bid is an extended opening, MSA or Catalog Bid, the Buyer may use the vendor tracking template in Smart Sheets to monitor the bid.
 9. A draft of the FISD bid is sent to participating campus or department staff. Campus or department staff must review the draft and “approve to release” a bid in writing before it is issued. OR you may meet with the campus/department staff to review the bid. If you meet with staff, you must follow up with an email to receive the written “approval to release”.
 10. The Buyer reminds staff that all communication between FISD and potential bidders must be through Purchasing. Staff should not discuss an open solicitation with potential vendors during an open solicitation.

Distributing Requests for Bids/Quotes to Vendors and Legal Notice Requirements

11. Notices of open RFPs, CSPs, RFQs, etc. are distributed to vendors registered in the FISD online supplier portal (Ion Wave) when the solicitation is released. Potential vendors register in the Ion Wave supplier portal and select the types of goods and/or services their organization can provide to the District.

12. A legal notice is required for bids subject to Education Code 44.031. The Buyer emails the legal notice to the newspaper "Star Community Newspapers". Place legal notice by emailing Star Local Media (jcraghead@starlocalmedia.com) and copying Director of Purchasing & Executive Secretary to CFO. Attach Legal Notice confirmation from Star Community Newspaper to the bid on the Smartsheet. Use this as a holding place until the bid closes and then the document is to be attached to the bid in Ion Wave.
13. The legal notice contains the bid specifications, requirements, closing date, and instructions to the prospective bidder on how to submit an electronic bid on the District's website. The legal notice will appear in the Newspaper for two consecutive weeks.
14. The Buyer submits a help desk ticket to add the FISD bid opportunity to the FISD Procurement web pages.
15. Prior to the closing date and after submission to the District, the vendor may modify the RFP/CSP by logging into Ion Wave. Ion Wave allows the District's Buyer to make updates to the RFP/CSP prior to the closing date. After an RFP or CSP is closed, Ion Wave restricts any changes to the RFP or CSP until after the award is issued. If a CSP is chosen as the bidding method, Ion Wave also prevents any viewing functionality until after the closing date.

Bidding Process

16. To submit an electronic bid/proposal, a supplier must register in the District's e-bidding website, Ion Wave.
17. Once a bid is issued, all communication between potential bidders and FISD about the open solicitation must be with the purchasing department. Campus and department staff should not communicate directly with a vendor about an open solicitation. All questions regarding any open bid will be answered to all invited vendors and only through IonWave.
18. The Buyer is responsible for providing technical assistance to potential bidders on a limited basis.
19. If necessary, the Buyer holds a pre-bid conference.
 - The date and time of the pre-bid conference is agreed upon by the Buyer and participating FISD staff.
 - The Buyer collaborates with participating FISD staff to set an agenda for the pre-bid conference.
 - The Buyer must attend the pre-bid conference. He or she is responsible for ensuring no unfair competitive advantage is afforded to any one vendor at the pre-bid conference.
20. While the bid is open, the Buyer completes the following activities:
 - Collect questions from potential bidders and distribute them to campus or department staff, as necessary. The Buyer is responsible for collecting responses to vendor questions and releasing answers to vendors via Ion Wave.
 - Review each bid as response is received to vet its responsiveness are the terms

and conditions attached, are all required attachments signed, including pricing, attached?

- Communicate with bidders about missing attachments/nonresponsive bids, as needed, to correct bid responses.
 - Construct/Start the evaluation template.
 - Add preliminary information to the Board agenda folder on the I drive
 - Start downloading and organizing documents that must be pulled from Ion Wave and will be sent to evaluators.
 - Investigate each submission (especially contracted service vendor submissions) for possible employee responses. Current employees are not able to respond to or be qualified on Frisco ISD bids. Buyer will relay possible employee/respondents to Senior Buyer who will check for disposition in the HR module of E-Fin. If the respondent is an employee, they will be disqualified. If the respondent is a former employee, Senior Buyer will turn over all the information to the Director of Purchasing to decide if the respondent will go to evaluation.
 - Start organizing the email sent to the vendor team the day after the Board award.
 - Make sure evaluators have been selected and notified that they will be evaluating. Send Non-Disclosure Agreements and Evaluator Guidelines, as needed.
21. The Buyer is responsible for coordinating the bid/proposal submitted on the website and in hard copy.
22. Ion Wave is configured to prevent suppliers from submitting any bids after the closing date. We do not accept late bids after the closing date stated in Ion Wave. When the bid closes, the Buyer submits a help desk ticket to remove the solicitation opportunity from the Procurement web page.

Bid Evaluation

23. If the bid is not an extended opening, when the bid closes, the Buyer completes final reviews of all vendor bids for responsiveness:
- Is the product or service the vendor provides aligned to the scope of work for the FISD Bid released?
 - Is the vendor's response complete?
 - Did the vendor submit a catalog, rate, price sheet, etc. for the bid?

If the bid is an extended opening bid and only a subset of responses are being sent to evaluation, the Buyer uses the "vendor tracking" sheet in Smart Sheets to track the bids that are being sent out for evaluation.

Responsive bids are packaged/prepared to send to evaluators.

24. The Buyer completes the final download of documents that need to be sent to evaluators from Ion Wave and organizes the documents to send to evaluators.
25. The Buyer finalizes the evaluation template. Evaluation scoring criteria and points should be inserted on the Scoring Help tab of the evaluation template. The Buyer inserts any

remaining names of responsive vendors on the Composite tab of the template.

26. The Buyer schedules a 30-minute zoom call with evaluators. The purpose of the call is to ensure each evaluator has signed the NDA and Evaluator Guidelines, to review the scoring help and add additional questions to assist in scoring, and to answer any questions evaluators have about scoring.

With Director approval only, the Buyer can consider this meeting and the participants optional under the following conditions:

- A. End users who have recently participated in and are familiar with the current evaluation process and template do not have to be required attendants. (List of end users who meet this requirement can be found at: https://docs.google.com/spreadsheets/d/1hnsy2Q1cU_cKq2B3MMz2ol6Q3h52uOPoL5R-kU9NdBI/edit?usp=sharing)
- B. End users who meet the above requirement (Bid Evaluation 26.A) and do not need to be updated regarding specific information in relation to bid evaluation, do not need to be required attendants.
27. The Buyer emails vendor bids (to include all documents needed to review bids), the scoring template, and the “How to Score Responses” tip sheet to evaluators using the Department’s standard email template. The Buyer tells the evaluators that they may review the vendor’s web site if it was provided as part of their response.

The Buyer must include the following in the email to evaluators:

- Date by which evaluators must return evaluations
 - Link to access vendor responses downloaded from Ion Wave.
 - Planned Board meeting date at which vendors will qualified, if possible.
 - That the evaluators must contact the Buyer immediately (before the evaluation return deadline) if they cannot complete the review.
 - Evaluators must respond to this email confirming its receipt.
28. The Buyer sends an email to evaluation alternates to tell them they were named as an alternate should an evaluator not be able to complete the review.
29. Purchasing will attempt to initiate the evaluation with identified evaluators at least twice. If the identified staff is non-responsive, the vendor evaluation is set aside. The evaluation will not be evaluated and will not go to Board to be qualified.
30. Solicitation evaluations often include multiple evaluator teams. Teams completing the evaluation will go to Board, leaving only the reviews incomplete by the non-responsive evaluator that will not be qualified.
31. The Director of Purchasing will email the assigned evaluator and the individual who

identified them regarding failure to engage in the evaluation process. The CFO will be copied.

32. The Buyer monitors the status of evaluator progress, answers questions, and is available as needed during the evaluation period. The Buyer compiles all evaluator score sheets in the evaluation template once received.
33. The Buyer is responsible for sending requests for clarification to the vendor during the evaluation period.
34. When scores are totaled, the Buyer sends scores to the evaluation committee and other participating staff as a notification. The Purchasing Department is responsible for analyzing scores and recommendation score cut points or award criteria to evaluation staff. The Buyer collaborates with campus and department staff to develop a plan for completing reference checks for high-scoring vendors, if necessary.
35. The Buyer asks whether the evaluators, project manager or other participating staff want to schedule finalist interviews, presentations, etc. If staff want to move forward with finalist interviews or presentations, the Buyer is responsible for scheduling the interviews or presentations with vendors.
 - A. Collaborate with evaluators and other staff to determine the number of finalists to invite to interviews/presentation sessions.
 - B. Determine the format and length of the interviews or presentations
 - C. Identify possible dates and times
 - D. Identify a location for the presentations and reserve rooms
 - E. Determine what FISD staff should attend the interviews or presentations
 - F. Develop a scoring rubric for staff scoring finalist reviews or presentations in collaboration with the project manager and proposal evaluators
 - G. Determine how the finalist presentation scores will be added to the proposal evaluation scores.
 - H. Send NDAs and evaluator guidelines for additional staff scoring in-person finalist presentations or interviews. The Buyer must have a signed NDA for all new evaluators before the staff person can evaluate the finalist presentation.
 - I. Attach new NDAs to the Bid record in Smart Sheets for a holding place until the bid closes. Add any other supporting documentation.
 - J. Collect all scoring rubrics from evaluators and attach them to the bid in IonWave. Compile the finalist interviews/presentations and proposal scores. Send the scores following the finalist presentations to participating staff as notification of which vendors will be included in the Board recommendation for award action.

- K. Following the bid close, Buyer is responsible to move all documentation from Smart Sheets and attach to the bid in IonWave. Buyer will also attach proof of Legal Notice advertisement from Star Local Media.
33. The Buyer must communicate with bidders to request a best and final offer or to clarify remaining staff questions after the finalists' interviews, as necessary.

Award Recommendation

34. Frisco administration may opt to preliminarily award a vendor pending successful negotiation of the terms of a contract. The vendor selected for the negotiation process is sent an email notification on the intent to negotiate.
35. If the contract resulting from an awarded RFP will be over \$1M, staff will request the vendor complete and return a Form 1295—Disclosure of Interested Parties to FISC. (See separate email template for preliminary award pending negotiations for contracts over \$1M and under \$1M).
36. Purchasing will facilitate negotiation with the highest scoring vendor. If at any time it is determined that we will not reach a successful negotiation, purchasing will notify the highest awarded vendor that negotiations will terminate and FISC will start negotiating an award with the second highest vendor. Work down the scoring list until administration decides to cancel the bid / non award.
37. The Buyer updates the Board agenda outline on the Procurement I drive and creates a bid folder in the Board Agenda folder on the I drive. The Buyer adds the evaluation and the Board Agenda Action Sheet to the folder.
38. The Board action sheet includes:
- List of recommended vendors (or attachment)
 - Spending estimates (when applicable)
 - Staff member represented in IST
 - Board meeting date
 - Background information
 - Term of the qualification (dates)
39. The Assistant to the Superintendent places the agenda item on the School Board's agenda. Support for the bid/proposal is sent to the School Board prior to the meeting for review.
40. The District's School Board reviews and approves all bids/proposals as evidenced in the minutes.
41. The Buyer determines which vendors were awarded by the Board and notifies the vendor via an award notification in the Ion Wave system that the Board has awarded them the bid/proposal.

Protest of a Solicitation or Award

Protest of a Solicitation

42. Information about protesting a solicitation or a qualification is provided to applicants as part of the standard bid template. The RFP or RFQ notifies applicants that all protests must be

submitted in writing to the Buyer responsible for the solicitation.

43. The Buyer forwards the protest to the Purchasing Director. (If the protest is regarding a Child Nutrition bid, the protest will be forwarded to the Director of Child Nutrition (CN) at the same and the Director of Child Nutrition will notify TDA that a protest has been received.)
44. If the protest is valid or the vendor does not agree to the resolution proposed by the Purchasing Director, the protest will be forwarded to the Chief Financial Officer for resolution and communication with the vendor.

Protest of an Award or Qualification

45. When a vendor protests an award or qualification the Purchasing Director will schedule a meeting with the vendor to review the details of the award and ensure the vendor understands the entity's status.
46. If the protest is not resolved in the initial meeting, the entity may submit a formal protest in writing within five business days of the public notice of award or qualification (Board meeting).
47. The written protest notice will be sent to the Buyer responsible for the solicitation. Once received, the protest should be emailed to FISD staff based on the levels below. If the protest is regarding CN, the CN Director will notify TDA of the protest received.
 - (A). Level 1: Award value up to \$499,999 – Purchasing Director
 - (B). Level 2: Award value above \$499,999 – CFO and Purchasing Director
48. The email should include:
 - (A). A specific identification of the statutory or regulatory provision(s) that the action complained of is alleged to have violated;
 - (B). A specific description of each act alleged to have violated the statutory or regulatory provision(s);
 - (C). A statement of relevant facts;
 - (D). An identification of the issue or issues to be resolved; and
 - (E). Argument and authorities in support of the protest.
49. In the event of a timely protest, FISD will temporarily delay the procurement in question unless the CFO determines that the award is necessary to protect the interest of the District and/or the protest would not affect the outcome of the award.
50. FISD will submit a written response to the protest within 10 business days of receipt.
51. The protesting vendor may appeal FISD's decision. A written appeal should be sent to the FISD CFO and General Counsel with 5 business days of written receipt of FISD's decision.
 - (A). If it is determined that no violation of rules or statutes has occurred, FISD will inform the vendor by a letter which sets forth the reasons for the determination.

- (B). If it is determined that a violation has occurred in a case where a contract has not been awarded, FISD will inform the vendor by letter which sets forth the appropriate remedial action.
- (C). If it is determined that a violation has occurred in a case where a contract has been awarded, FISD will inform the vendor and may declare the contract void.

52. The protesting vendor may appeal this decision. A written appeal should be sent to the FISD CFO who will present it to the Deputy Superintendent of Business/Operations within 5 business days of written receipt of FISD's decision.

53. This decision cannot be appealed.

Post-Award Process

The day after the Board of Trustees awards a list of recommended vendors, the Buyer:

- 54. Logs in to Ion Wave and awards the solicitation. Vendors are notified of award / non-award when a bid is awarded in Ion Wave.
- 55. Request a 1295 form from a vendor, if needed.
- 56. Email Information to the Vendor Team Senior Buyer (copy vendors@friscoisd.org and Senior Buyer Bidding Team). The email should include the name of the vendor, and the vendor # (if already in e-fin). If there is not a vendor number assigned to vendor, "NEEDS VENDOR #" should be annotated in the email. Bidding Buyer will also include the name and number of awarded bids and the term dates.

If there are priority vendors that end users are waiting to access, you must have the Bidding Senior Buyer review and approve priority processing of those vendors. Once vetted by the Senior Buyer, you will include the list of priority vendors at the top of your email to the Vendor team and vendors@friscoisd.org.

Qualification Extensions

- 57. Vendor qualifications are usually one-year with optional extensions built in. Each extension is typically for one year, for a total number of years specified, which limits FISD's ability to have a contractual agreement with any vendor. If a vendor or contract is not meeting the needs of the district, the district may go through the bidding process at any time.
- 58. The Buyer uses the FISD Bid Calendar in Smart Sheets to track bid extensions and expiring bids.
- 59. The Vendor team also runs a Cognos report each month to display contracts by end date, to determine if any extensions are required.

The Vendor Team may periodically provide end users a list of approved, awarded vendors, as a purchasing resource.

- 60. If a contract is up for extension, the Buyer will send correspondence to the respective department or initial requestor to see if they would like to extend, update, or cancel the contract.
 - A. Purchasing will contact the contract manager through email notification and alert them that the bid is due for extension renewal. Ask if the bid is meeting their needs and if renewal is desired by end users.

- B. The contract manager/end user department should verify specifications and/or report any issues that should be addressed in the extension to the awarded vendor(s)
- C. Purchasing will issue the extension ONLY to the previously awarded vendor(s), so long as their performance was satisfactory. The response documentation will be sent to the requesting department once completed only if requested.
- D. Extension/Renewal information will be added to the Board Agenda under “Informational Items”.
- E. If the District decides the qualification will not be extended, Buyer will send the vendor an email notification utilizing the “non-renewal template” located in the bidding and solicitation folder of the Purchasing Google Drive.

After Board Meeting

61. Email vendor team and request update of E-Finance, as required:

- Update address, phone, contact, PO Email, A/R email and contract expiration date.

“Award” the Extension in Ion Wave.

Multiple Award Requests for Proposals

FISD uses multiple award RFPs to purchase supplies, materials, and services to meet the needs of FISD students and staff. Multiple Award solicitations are conducted using the ION Wave application for items and services such as instructional supplies, guest speakers, Fine Arts service providers, and professional development providers.

Multiple award solicitations allow multiple vendors to be awarded qualifications for a specific bid in which the products and/or services are alike or essentially similar in nature and specifications. For example, FISD issues one RFP for catering and retail food from which it awards multiple vendors.

FISD must use the Request for Proposals (RFP) method when issuing a bid from which multiple “contracts” will be awarded. Proposals must include pricing. (TEC 44.031(a)(3)) Proposals are evaluated and awarded using the best value criteria stated in TEC 44.031(b).

Multiple award RFPs are used when staff cannot accurately aggregate expenditures for the purpose of determining the procurement method and can be used when the annual aggregate expenditures for like products or services exceeds the simplified acquisition threshold of \$50,000.00.

Bidding Requirements for MSA Vendors

If a school or department plans to purchase from vendors awarded through a multiple award RFP, the requestor is required to get the appropriate number of quotes needed to satisfy informal bidding (quote) standards. In addition, FISD confirms that an MSA bid meets minimum competitive requirements.

Justification for Multiple Award Contracts

The Director of Purchasing must create a memo identifying the need or rationale for a multiple award procurement. The memo should indicate that historically, purchases made through such contracts cannot be predicted and/or identified until the need occurs, but because the estimated expenditures may meet or exceed the simplified acquisition threshold, a formal RFP must be

issued. The memo must confirm the appropriateness of using a multiple award RFP and that a single contract cannot meet district, department, school, teacher, or student needs.

Annual Review of Multiple Award Contracts

The Director of Purchasing must conduct a semi-annual review of contracts awarded through multiple award RFPs, a review before an option to extend is exercised, and a review when contract(s) are soon to expire. Evidence of the review is maintained by Purchasing.

The review must include:

- Calculation of total expenditures for the period for awarded vendors.
- Evaluation of the justification for a multiple award RFP to confirm that conditions justifying the procurement method still exist.
- Evaluation of circumstances that may make a single award the best value for FISD.
- Examples of Multiple Award Procurements

A multiple award RFP is not appropriate for all procurement activities. Unique circumstances such as need for expedited receipt or delivery, the inability of one vendor to meet the demand for items or services, or variances in goods and services provided may justify a multiple award RFP.

Examples of goods and services suitable for multiple award RFPs include:

- Administrative contracted services
- Instructional contracted services
- Professional Development providers
- After school / summer school programs or classes
- Catering services / retail food
- Charter bus services
- Fundraiser services
- Special event services (disc jockey [DJ] services, carnival type services, and prom or graduation event services)
- School photography
- Software and applications (small purchases with limited distribution)
- Specialty printing services

Catalog or Discount-From-List Procurements

Catalog or discount-from-list RFPs can be used when multiple vendors providing goods and services that are alike or similar in nature are available, but unique circumstances exist that may make one vendor's products or services not suitable for all schools and all students. Examples of situations in which a catalog or discount-from-list RFP may be needed is the purchase of instructional materials to meet the special needs of students or curriculum purchases for different schools. The vendor may or may not provide a discount from standard pricing.

Examples of goods and services suitable for catalog or discount-from-list RFPs include:

- Classroom instructional materials
- Fine arts equipment and supplies
- Health and first aid equipment and supplies
- Vocational equipment and supplies
- Retail general merchandise
- Maintenance and operations parts not available through an existing FISD contract

Travel

The Travel Desk is owned by the Purchasing Department. The Travel Specialist arranges travel for staff members traveling on school business. Staff is encouraged to utilize the travel desk to confirm flight, hotel, and/or car rental reservations, and/or to pay conference registrations. Travel requests are submitted to the travel desk via an online [travel request form located in Laserfiche](#). Staff can access the form directly via the staff portal by finding and selecting the Travel Help tile. Additional information about staff travel by selecting the Travel Desk tile.

Once the Travel Desk receives the online request, the Specialist will make all the travel arrangements. After the requests are completed, the specialist will finalize the process by sending the requestor a copy of the purchase orders and all corresponding booking confirmations.

Internal Controls

FISD uses requisitions (REQs) and purchase orders (POs) to ensure all purchases are in line with the district's needs, budget, and compliance requirements.

Requisitions

A purchase requisition notifies Purchasing that goods and/or services have been requested through eFin, the district's financial system.

Purchase Order Types	Item or Service Requested
Alt Pay	Travel, Reimbursements, Other
Standard	Commodities
Not-to-Exceed (NTEs)	Goods and/or Services
Blanket	

The following procedure is used to process a REQ.

1. A requestor at the campus or department enters a purchase requisition. Guidelines and training on requisitioning is provided to campus and department secretaries by the Compliance Department.
2. Requisitions are routed to the principal or department head in eFin for review and approval.
3. Each requisition goes through a specified workflow for needed approvals. For example, the approval workflow may be for a technology purchase, a furniture purchase, or a purchase from a federal grant in, in which case the requisition would be routed through Compliance for grant approval.
4. Requisitions are reviewed and approved by the Finance Director's office before they are routed to the Purchasing Department. The Finance Director's staff reviews budget and

account codes and whether the approval group on the requisition is correct. The Director of Finance's staff returns requisitions as needs correction if these items are incorrect.

5. When the requisition is routed to Purchasing, the Buyer approving requisitions logs in to eFin and goes to the Approve / Deny Requisitions page, selecting "L—Approved at Lower Level" as the approval criteria, and checks the "required" check box to display the requisitions queue.
6. The Buyer clicks on a requisition number to open the requisition screen. He or she notes the intended purchase order type and the good(s) or service(s) requested. This information determines how the Buyer will process the request.

Alt Pay. Alternative payment methods, or Alt Pays, are processed by the Purchasing Department. Alt pays consist of reimbursements to employees or parents, memberships, campus officers, referee and official payments, and any other payment as directed by the Director of Purchasing. Approval of an alt pay is the same process as approving a PO req with a defining 2* approval group. All alt pays should have documentation attached that justifies the payment being requested. If the requestor is requesting an Alt Pay on a REQ received by Purchasing, the Buyer confirms the purchase should be made using the Alt Pay method and returns the requisition as "needs correction". The Buyer notifies the requestor that the requisition was sent to an incorrect approval group.

Alt Pays are used for the purchases below (not an inclusive list):

- Field Trips – Initial deposit
- Refunds
- Memberships
- Employee Reimbursements
- Athletic UIL Officials
- Security
- Fed Ex
- Special Financial Payments (Bonds)

Approving Alt Pays

1. Log into eFinance using your log-in credentials Under Applications select:
 - ↳Purchasing
 - ↳Requisition Processing
 - ↳Approve/Deny Requisitions
- A. Under Approval Criteria click on the drop-down box and select 'L-Approve at Lower Level. Click the "OK" button at the top task bar.
- B. Go to the Approval Group box, type "2*" and Click the "OK".
- C. This will pull up the list of all the requisitions waiting to be approved.
- D. Click on a Requisition so that the field is highlighted.

- ↳ Click on “Details” at the top task bar to review the following for correctness:
 - Budget Code
 - Account Code
- E. Click on “Attachments” to confirm documentation attached is correct and matches the Alt Pay information. Refer to the *Alternate Pay Checklist* for the specific documents required.
 - Vendor/Employee/Official name: On Alt Pays to athletic officials, confirm that the address is the same on the Alt Pay AND in the vendor file in eFinance. If not, it will need to be sent back to the originator to be corrected.
- F. Typically, an updated W-9 will need to be obtained and the vendor file updated before the Alt-Pay can be resubmitted for approval.
 - Description
 - Quantity
 - Dollar amount
 - Notes – Review as it pertains to Purchasing such as split payments to ensure total is correct. Special instructions for Accounts Payable would be if documentation needs to be sent with the payment (i.e. registrations, membership’s invoices without invoice #'s, UIL entrance with student rosters).
 - Attachments must be in .pdf format. If not in a .pdf format, they will not transfer correctly to Laserfiche and the Alt Pay will need to be sent back to the originator to be corrected.
- G. After the documentation has been reviewed and verified that it matches the Alt Pay, click the “Approve” button at the top task bar.
- H. Once all the Alt Pays in the approval screen have been reviewed and either approved or “Needs Correction”, click the “OK” button at the top task bar.
- I. A Pop-Up box asking for Requisition Approval, click “Yes” and the system will approve the Alt Pays and prep them for conversion to a Purchase Order.
- J. For the Alt Pays to flow into Laserfiche for Accounts Payable to process, the Alt Pays need to be converted to Purchase Orders. Under Applications select:
 - ↳ Purchasing
 - ↳ Purchase Order Processing
 - ↳ Mass Convert Reds to POs
- K. Go to the Approval Group box, type “2*” and Click the “OK”. Then click “OK” again and a Pop-Up Box will appear to indicate the requisitions are being converted to PO’s.
- L. After the requisitions have been converted to Purchase Orders, they will be ready print. Under Applications select:
 - ↳ Purchasing
 - ↳ Purchase Order Processing
 - ↳ Purchase Orders

- M. Go to the Approval Group box, type “2*” and Click the “OK”.
- N. Go to the Status box, click on the drop-down box and select “Complete”, then
- O. Click “Find”. This will pull up the Alt Pays that are completed and to be printed.
- P. Click the “Print Purchase Orders” button in the top task bar. The print screen will come up and click “OK”.
- Q. A series of PO Up boxes will appear, click on “Yes” and “OK” until the last screen indicates the PO’s have been printed.
- R. Once the Alt Pays (PO’s) are printed they follow the workflow into Laserfiche for Accounts Payable to process for payment.

Alternate Pay (Alt Pay) – Needs Correction

1. If there are any corrections to the Alt Pay, while reviewing, click on the “Needs Correction” button at the top task bar and this will pull up a “Notes” box.
 - A. Input what needs to be corrected. The space is limited, and the note will need to be very brief. For example:
 - 1) Missing Attach
 - 2) Change code to 6299.XXX

↳Click the “OK” button at the top task bar and that will bring back the “Details” screen.

↳Click “OK” again.
2. The Alt Pay will go back to the originator to be corrected. They need to change the date to the current date and then resubmit the Alt Pay for approval once they make the correction.

Emergency Alt Pay Request

If a campus/department requests to have a check processed outside of the normal processing schedule. You will be notified for approval of the Alt Pay. You will also need to notify the Accounts Payable department as they will have to make a special check run.

Cancellation of Alt Pays

To cancel an Alt Pay that has **already been approved** ~ the originator will need to email Accounts Payable with the Alt Pay number and reason for cancellation. To cancel an Alt Pay that has **not been approved** ~ deny the approval and it will be cancelled.

Budget & Account Codes on Alt Pays

1. Fine Arts - confirm the approval group is 2903 – Fine Arts when the account code used is XXXX.06X. These all should go through the Fine Arts department using their approval group and not through the campus’ approval group. If an Alt Pay has a campus’ approval group and XXXX.06X account code, it will need to be sent back to the originator for correction.
2. 1410 budgets – this is next year’s budget code and has no project codes associated with it. If one does appear on the Alt Pay, it will need to go back to the originator for correction. An approved Eduphoria form will need to be attached to the Alt Pay when using next year’s budgets.

B. Standard Purchase Orders

A purchase order is a binding contract and promise to pay for items requested from an approved vendor. A PO encumbers or holds funds to pay for purchases. FISD staff use POs to pay for goods and services after they are received. To review a request for a standard PO, the Buyer analyzes what the request is for.

1. Review the “Defined Windows” pages, accessible from the vendor information screen found by accessing the “Vendor List” within the “Purchasing” portion of eFin.
 - (A) If no valid contract information is listed, the Buyer asks the Vendor Team to review the vendor record in eFin. If no active contract is available, staff must analyze the request to determine whether a legal purchase method is available. Email Vendor Team Leader (Jonathan Roberson) with Requisition number and Vendor number for further research/vetting/validation of vendor usability.
 - (B) If no valid purchase method is available, the Buyer denies the requisition.
 - (C) If we do have a purchase method, but the items the requestor wants to purchase are not included on the vendor’s contract, deny the requisition. If you can offer the names of other vendors who provide the products or services, send those names with the denial.
 - (D) If an active contract is available and the goods or services are available from the selected vendor, the Buyer reviews the contract detail, information on the requisition, and current pricing list to determine:
 - (1) **If we are buying services and have the services already started.** If yes, is the Non-Compliant Purchase form attached? If the form is attached, the Buyer continues to process the request.

If the Non-Compliant Purchase form is not attached, the requisition is returned as “needs correction”, and the requestor is instructed to attach the Non-Compliant Purchase form. The approved form must be attached to the requisition before the Buyer can process the request.
 - (2) **Are quotes required? If quote(s) are required and attached, does the quote match information on the requisition and the current contract pricing.** If the quote, current contract pricing, and information on the request do not match, the Buyer returns the requisition as “needs correction” to the requestor for the correction to be made. For an under \$50K spend, the number of quotes must follow the requirements in the [Quotes \(Informal\) Bidding \(Under \\$50K Spend\)](#) section above.
 - (3) **If the request is for a contracted service, is a fully executed contract attached to the requisition.** If the fully executed contract is not attached, the Buyer returns the request as it needs correction and notifies the requestor to attach the fully executed contract and resubmit. Provide the requestor information about accessing the [“contract approval tile”](#) in the staff portal to submit a contract for signature, if an attachment requires a signature, the attachment must be signed.

After analyzing the request to ensure it fulfills the above requirements, the Buyer approves the requisition, and it is converted to a PO. A comprehensive list of items to check when reviewing a requisition for a standard PO is included as **Attachment 2**.

C. Not-to-Exceed Purchase Orders (NTE)

A request for a “Not to Exceed” PO is a one-time PO to purchase goods or services not to exceed a specified dollar amount noted on the purchase order. The requisition must include” NTE” in the comments section.

Not-To-Exceed POs are typically for \$500.00 or less to purchase items that can be picked up at a local store for an event (for example, catering, Hobby Lobby, Kroger). The Buyer should review the GUIDANCE folder on the Purchasing Google Drive for updates on processing Not-to-Exceed POs.

D. Blanket PO

Blanket purchase orders are open purchase orders for ongoing purchases that encumber a fixed amount of dollars with the same vendor. Blanket POs at the campus level are typically for contracted service vendors for which we have a set hourly rate. **A change order cannot be requested for a Blanket PO.** Updates and changed guidance for processing blanket POs will be in the GUIDANCE folder on the Purchasing Google Drive. The Buyer should review the file to see if guidance has changed.

1. If the request is for a blanket PO, the Buyer reviews the request to see if an approval from the Purchasing Director is needed.
2. If the blanket PO requisition is from a department, the Buyer reviews the requisition to determine whether the goods and services requested are appropriate for a blanket PO. If not, the buyer denies the request.
3. If the blanket PO request is from a campus:
 - a. If the request is for a contracted service for which we have a set hourly rate, the Buyer approves the requisition.
 - b. If the request is for supplies, the Buyer reviews the requisition to determine whether the goods requested are appropriate for a blanket PO. If this cannot be determined, the Buyer notifies the requestor that a Purchasing Director approval email needs to be attached to the requisition. This is usually the case when a campus submits a blanket PO requisition for a retail store.
 - c. If the Director approves the request, an approval email is attached. If the director does not approve the request, the requestor will be told to submit a requisition for a standard PO.

Basic Requisition Guidance

A. Needs Correction

A Buyer can return a REQ identified as “needs correction” to the requestor. This is done when there is incorrect information or information needed to process the request is missing. Needs correction is used in several situations. Buyers reviewing requests use email template to provide information to requestors about why the request was returned needing corrections. Examples of “needs correction” events include:

- The buyer field is empty or ambiguous
- The prices on the quote do not match the REQ
- The Description field needs to be changed
- Missing required attachments or quotes

Do not hold REQs for longer than one day unless the REQ is on the agenda. If the REQ is not corrected by the end of the business day, send it back to the requestor as “needs correction”.

B. Denials

Denying a request is a rare decision. Examples of when a request would be denied include:

- When the Buyer is asked by a director, principal, or the requestor to deny the requisition.
- When a punch-out order has the wrong coding: budget account, accounting code, etc.

Tracking Requisitions

Purchasing tracks specific information about REQs processed for the purposes of monitoring pending requests and to identify instances and patterns of noncompliance.

A. Requisition Needs Correction/Denial Reason Codes

The Director logs and tracks requisitions returned as needs correction or denied in Smartsheet’s for the purposes of reporting information about why requisitions are returned or denied to end users or other staff.

Purchase Orders

When a purchase request has been reviewed and approved by the Buyer processing requisitions, it moves from the purchase requisition queue in eFin to the PO approval queue.

The following procedure is used to process a PO.

1. The Buyer assigned to approving POs logs into eFin and goes to the Purchasing module. The Buyer accesses the PO approval queue by clicking on “Approve/Deny Purchase Order” link under the Purchase Order Processing heading.
2. When on the Purchase Order Approval page, the Buyer selects approval criteria, and checks the “Required” box. The Buyer then clicks on the OK icon at the top of the page. The PO approval queue will be listed on the page.
3. The Buyer opens a PO to review by clicking on a specific line and selecting OK. He or she conducts a second review of the request according to the procedures for requisition review and approval. This second review is an important internal control for the Purchasing Department.
4. If an error is found on the PO, it must be denied. A PO cannot be returned as “needs correction”.
5. If the review of the PO confirms it is complete and accurate, the Buyer approves the PO (“batching out”).
6. The Buyer accesses the PO listing page in eFin and prints the approved purchase orders.

7. eFin prints a report of generated purchase orders. The Buyer opens the eFin report on generated purchase orders to identify PO error messages.
 - a. If an “exceeds budget” error message is in the PO report, the Buyer goes to post-exception PO portal. Once on the exception page, the Buyer clicks the green OK button three times to generate a PO exception report. The exception report is a holding queue for purchase orders that must be reviewed.
 - 1) If the PO is listed as approved, go back to the PO listing and reprint the purchase order.
 - 2) If the PO is not approved, email the requestor to notify him or her that the PO exceeded the budget, and that the PO was not approved.
 - b. If a “system error” is listed on the PO report, the Buyer goes to the post-exception PO portal and clicks on the green OK icon three times. The Buyer processing POs then goes back to the PO listing and reprints the purchase order.

Change Orders

Change orders are processed in eFinance to make corrections to a purchase order that has already been approved and printed. Change orders are only used for the following:

- Changes to quantity
- Changes to budget and/or account code
- Changes to dollar amount

A change order cannot be processed for a blanket purchase order, except for certain departments listed below:

- Child Nutrition
- Construction (because Construction has multi-year POs paid with bond funds that roll forward annually)
- Facilities
- Fine Arts (generally for deep cleaning required for COVID mitigation or instrument repairs, sheet music throughout the year)
- Maintenance
- Risk Management
- The Sam Carter Service Center (for the 901—Utilities approval group, for COVID PPE, etc.)

Approving Change Orders

1. Log into eFinance using your log-in credential

2. Under Menu select:

Purchasing < Entry & Processing < Approve/Deny Change Orders

3. Under Approval Criteria click on the drop-down box and select ‘L-Approve at Lower Level. Check “Required”. Click the “OK” button at the top task bar. This will pull up the list of the change orders waiting to be approved.

4. Click on a change order so that the field is highlighted.

5. Double click the change order to open it.
6. Using a different screen, open the PO to see what changes have been made.

Please note, budget code changes can include a new budget/account code or having a project code removed and/or adjusted.

7. Review the original purchase order to determine whether the change requested is for a blanket purchase order. If so, verify that it has not been requested by one of the departments listed as exceptions at the beginning of this document. If the change request for a blanket purchase order has been entered by a campus or non-exception department, deny the change and email the end user. You may be able to advise the end user that he or she can submit a new blanket PO to cover recurring expenses during the school year.
8. Verify that the end user has attached a brief explanation of why the change order is needed.
9. If the end user has not attached a brief explanation, send the individual an email using the standard email template:

I have a change order for PO ##### in my queue for approval. Can you reply to this email with a very short explanation about why we need the change order? I will "FERPA" the email and attach it to the original PO as the explanation/ justification for the change order. It will serve as the change order justification the green book requires.

Please note, we generally do not hold requisitions that need corrections, but we can email for the change order explanation. This is because we have a limited number of change orders in the approval queue at any time.

10. After the change order has been reviewed, click the "Approve" button at the top task bar.
11. Once all the change orders in the approval screen have been reviewed and approved, click the "OK" button at the top task bar.
 - A. A Pop-Up box will appear asking if the change order is approvable; click "OK" and then a series of Pop-Up boxes will appear. Click "OK" and then the system will approve the change orders.
 - B. The "Mass Post" report will be highlighted at the bottom of the screen, click "Open" and the change orders that were approved will appear on the report.
12. For the change orders to reflect on the purchase order, the change order will need to be printed. The "Mass Post" report will note the purchase order number to use for printing the change order.

13. Under Menu select:

Purchasing < Entry & Processing < Change Orders

- A. Key in the purchase order number in the purchase order box and click "Find". This will pull up the change order.
- B. Click the "Print Change Orders" button in the top task bar.

- C. The print screen will come up and uncheck the “Email document to vendor” box then click “OK”.
 - D. A series of Pop-Up boxes will appear; click “Yes” and “OK” until the last pop-up box asks, “Did the change order print correctly?” Click, “Yes”.
14. Once the change order is printed, the purchase order will need to be reprinted so that it will reflect the change order and to flow into Laserfiche for Accounts Payable to process. Go back to the menu by clicking the back button twice.

15. Under Menu select:

Purchasing < Entry & Processing < Purchase Order Processing< Purchase Orders

- A. Key in the purchase order number in the purchase order box and click “Find”. This will pull up the purchase order.
- B. Click the “Print Purchase Orders” button in the top task bar. The print screen will come up.
- C. Check the “Reprint purchase orders” box and uncheck the “Email document to vendor” box then click “OK”.
- D. A series of pop-up boxes will appear; click “Yes” and “OK” to move through the questions in the pop-up menu.

Credit Card Requests

FISD does not have a district wide p-card program. On occasion, campuses or district departments will request, or Purchasing will recommend, the use of the Business Services credit card. The FISD Business Services department credit card should be considered a payment mechanism, not a purchasing method. According to FASRG 5.50.1, the main role that the purchasing department performs in a credit card purchase is ensuring purchases made by a cardholder meet the established guidelines of a school district’s credit card purchase policy.

A request can be submitted to use the FISD Business Services credit card, if an allowable purchasing method is available (TEC 44.031) and the vendor only accepts credit cards as the payment method or a significant business need mandates the purchase be made faster than the PO process will allow. For example, payment of a conference registration fee in order to take advantage of an early bird registration savings.

Exceptions must be approved by the Director of Purchasing and/or the Chief Financial Officer (CFO).

The following procedure provides guidelines for FISD Business Services Office credit card purchases.

1. The requesting department or campus submits a District Credit Card Purchase Request through Eduphoria.
2. Eduphoria routes the District Credit Card Purchase Request through the following approval workflow: requesting department – Purchasing Buyer (Buyer) - Director of Purchasing. Throughout the approval process, Accounting, Purchasing and the CFO receive notifications and updates.

3. Upon receipt, the Buyer researches a legal procurement method. This includes:
 - Checking for current vendor status in eFinance. If the vendor is not listed in eFinance or if the purchase method is incorrect/not documented in eFinance, the Buyer will:
 - A. Assess whether the purchase is a non-competitive purchase allowable under FASRG 5.10; If not, the Buyer will complete the following to identify a purchasing method:
 - B. Search for vendor registration and bid award status in the FISD bidding system, IonWave, <https://fisd.ionwave.net/Login.aspx>;
 - C. Research cooperatives for awarded RFPs; and
 - D. Contact local ISDs to check vendor status and awarded RFPs or bids.
 - E. Or, confirm that FISD does not spend \$50,000 or more for like or similar products and services during a 12-month period.

The Buyer researches aggregate expenditures for the requesting department and the requested product or service. Expenditures should be analyzed by expenditure-object and locally defined sub-object codes. Fiscal YTD aggregate expenditures are obtained by running an Expenditure Audit Trail report in eFinance. Aggregate expenditures for the object and sub-object must be less than \$50K and expected to remain under \$40K during the fiscal year, for a request to be considered an “under \$50K” procurement method.

4. The Buyer will direct requesting staff to submit a new vendor packet and update contract defined windows screens in eFinance, as needed, to add the vendor to eFinance. It is the intention of the purchasing office to ensure all credit card purchase requests are made with established vendors in E-finance. If no number exists, the purchasing buyer will request a vendor packet be put through the vendor approval queue prior to approving the credit card purchase request. Any exception to this must be approved by the Director of Procurement and/or The Director of Accounting.
5. Once the above steps are complete, the Buyer details the findings in Eduphoria and approves or denies the request.
6. If approved by the Purchasing Buyer, the Director approves or denies the request.
7. If approved by the Director of Purchasing, the CFO's Secretary will work with the requesting department or campus to make the purchase. This ensures the credit card is only available for use within Business Services and that Business Services credit card purchases follow the written guidelines and procedures.
8. FISD Business Services credit card purchases are included in the general ledger and are journaled at the time of credit card reconciliation. Expenditure Audit Trail reports, listing fiscal YTD aggregate expenditures and other documentation regarding the credit card purchase, must be maintained by Purchasing for auditing purposes. They are maintained in the Credit Card Use file located in Google Drive. They are filed by vendor #_campus or department, month, year. (i.e. 00001_Purefoy0520)

Noncompliant FISD Business Services Department credit card purchases

If the Business Services credit card is used without following the above stated procedure, a District Credit Card Purchase Request form must be submitted through Eduphoria and a Non-Complaint

form must be attached to the request. The Director of Purchasing and/or Buyer will work with the requesting department or campus to ensure future compliance.

Store Cards

Purchasing collaborates with other Business Services Office departments to maintain a system of internal controls for store cards distributed to campuses and departments.

Annual Store Card Inventory and Store Card Training

1. Purchasing will manage the collection and inventorying store of cards annually.
2. The Compliance Department is responsible for communicating to secretaries that they must submit all store cards assigned to them by the last contract day of their annual employment contract.
3. Cards will be turned in to the Executive Assistant to the CFO, who will log the card numbers, the name of the individual submitting the cards, and the campus he or she works at.
4. The Compliance Department is responsible for developing and presenting an annual store card training for secretaries and principals.
 - A. End users must complete the Compliance training before receiving a set of cards for the next school year. Training will include information on logging card transactions and recommended best practices.
 - B. If end users do not complete the training and do not have a new card assigned to them, the old cards will expire and purchases at stores will be denied.
 - C. Principals must complete the store card training annually, as well.
5. The Compliance Department shares information on the status of secretaries' completion of the training via google sheets.
 - After secretaries complete the annual training, they will pick up a set of store cards from the Executive Assistant of the CFO before the start of school. A specific number of cards are issued to each school or department as follows:
 - High Schools will receive two Kroger cards, one Market Street card, and one Hobby Lobby card
 - Middle and Elementary Schools will receive one Kroger card, one Market Street card, and one Hobby Lobby card.
 - Departments will receive one Kroger card, one Market Street card, and one Hobby Lobby card.
 - The Purchasing department will order a new set/refresh one set of store cards each year. All cards will be refreshed on a four-year cycle

New Vendor Set Up & Store Cards

When a new vendor is secured, and store cards are needed to access that vendor, the Purchasing Department will order the initial set of store cards.

1. The Purchasing Department provides the set of store cards and a log of the store card numbers for the new vendor to the Executive Assistant of the CFO, who is responsible for logging the store cards and distributing them to end users at campuses and in departments.
2. The new store cards are integrated into the annual store card inventory process.

Lost or Stolen Store Cards

1. The end user is responsible for contacting the Business Services Office to notify Business Services that he or she has lost a store card or that he or she believes the store card was stolen. The end user's point of contact for lost or stolen cards is the CFO's Executive Assistant.
2. The CFO's Executive Assistant contacts the Purchasing Office to report a lost or stolen card.
3. The Purchasing Department will contact the store card vendor to deactivate and/or replace the lost or stolen card as appropriate.
4. Any new store cards ordered to replace a lost or stolen store card will be provided to the Executive Assistant of the CFO.
5. The CFO's Executive Assistant coordinates the pickup of new, replacement cards by end users.

Employee Resignations or Terminations

The Principal or other campus administration is responsible for collecting all store cards as part of employee resignations or terminations.

Credit Cards and/or Checkout of Additional Store Cards

Hobby Lobby, Kroger, United Supermarket Store Cards

1. The Executive Assistant to the CFO is responsible for the checkout of additional cards to staff.
2. Staff must print the issued purchase order and bring it to the Business Services Office when requesting to use a store card.
3. The Executive Assistant to the CFO will log the PO number and name of the staff person checking out the store card.
4. Staff must return the store card within 24 hours.

Walmart Credit Cards

Staff have access to the Wal-Mart credit card, but only if no other vendor can provide the supplies needed. Secretaries following the following steps for making Walmart purchases:

- A. The end-user submits a Walmart Card purchase request form found in Form Space in Eduphoria.
- B. Once approved to make a Walmart purchase, the end-user submits a requisition and is issued a purchase order (PO).
- C. The end-user prints a copy of the PO and brings it to the CFO Executive Secretary.
- D. The end-user will check out a Walmart card from the CFO Executive Secretary on an as needed basis.
- E. The end-user will return the card within 24 hours and bring a copy of his or her receipt.
- F. All items must be received in eFin and processed according to Frisco ISD's standard Accounts Payable procedures.

Vendor Management in eFin

eFinance is the financial software used by FISD to receive, track and approve requisitions. Vendor

contract information is manually entered in eFinance to expedite the requisition approval process and ensure legal procurement. When a new contract has been awarded or a current contract has been renewed, several screens in eFinance require updating, by a Purchasing Buyer (Buyer).

Screen 5000

The following procedure is used to enter or update Contract Information / Screen 5000.

1. The Buyer entering or updating contract information, starts on the eFinance home page and clicks Vendor Information, taking them to the Search Criteria screen.
2. The Buyer locates a specific vendor by entering the Vendor Code or searches for the vendor by entering a name or key word in the Vendor Name or Search Name fields. The Buyer must use asterisks (*) around search term(s), *i.e. *Costumes by Dusty**
3. If multiple vendors are listed, the Buyer locates and highlights the desired vendor and clicks Defined Windows at the top of the screen.
4. The Buyer then highlights 5000 Contract Information and clicks the green OK button at the top of the screen.

Screen 5000 follows this format:

CONTRACT INFORMATION			
CONTRACT #	FINE ARTS	END DATE	
CONTRACT #	RFP 628-2018-11-22	END DATE	11/12/2022
CONTRACT #	FINE ARTS CLINICIANS	END DATE	
CONTRACT #	RFP 662-2019-10-23	END DATE	10/7/2023
CONTRACT #		END DATE	
CONTRACT #		END DATE	
CONTRACT #		END DATE	
CONTRACT #		END DATE	
CONTRACT #		END DATE	
CONTRACT #		END DATE	
CONTRACT #		END DATE	
NOTES &	THEATRE SUPPLIES AND EQUIPMENT		
COMMENTS			

5. Multiple contracts may be listed. The Buyer enters or updates Contract Name, Contract # and End Date for each contract. Contracts are listed by Contract Name in the first field, Contract # in the field immediately below Contract Name and End Date in the same row as the entered Contact #. There can be up to five contracts listed per vendor. *See below: Locating Contract Information.*
6. The NOTES & COMMENTS section is used to provide extra information about the contract.

- The Buyer clicks the green OK button at the top of the screen to save information.

Screens 5002 to 5006

The following procedure is used to enter or update Contract Information / Screens 5002- 5006.

- The Buyer clicks the red BACK button to return to the Search Criteria screen. The Buyer then clicks Defined Windows to return to the Defined Windows screen. Pages 5002 – 5006 list the contract details. The first contract listed on Screen 5000 is detailed on page 5002, the second on page 5003, the third on page 5004, etc.
- The Buyer highlights the contract page, (5002, 5003, 5004, 5005 or 5006), that needs to be entered or updated and clicks the green OK button.
- The Buyer enters or updates Contract Name, Contract #, Expiration Date, Discount (if applicable), Shipping (if applicable), Rep Name, YES or NO for Interlocal, Rep Phone, YES or NO for D&D Lookup, Expiration Date for D&D Lookup, 1295 (if applicable) and Expiration date for 1295 (if applicable), YES or NO for EDGAR, Expiration date for EDGAR, and Rep Email.
- The Buyer clicks the green OK button at the top of the screen to save information.
- This procedure is repeated for each contract being entered or updated.

Se

e below: Locating Contract Information.

Screens 5002 to 5006 follow this format:

CONTRACT 1			
CONTRACT NAME	FINE ARTS	COMMODITY	
CONTRACT #	RFP 628-2018-11-22	EXP DATE	11/12/2022
DISCOUNT	10%	SHIPPING	QUOTE
REP NAME	KYMBERLY NIELSEN		
INTERLOCAL	YES		
REP PHONE	817-548-5767		
D&D LOOKUP	YES	EXP DATE	8/11/2022
1295		EXP DATE	
EDGAR	YES	EXP DATE	11/22/2022
BUYER	BARNES		
REP EMAIL	COSTUMES@COSTUMESBYDUSTY.COM		
COMMENTS			

The following procedure is used to enter or update the PO Email.

1. From the Search Criteria screen, the Buyer clicks the EFT/ACH tab at the bottom of the screen.
2. The Buyer clicks the green Ok button and enters information to update the PO Email. *See below: Locating Contract Information.*
3. The Buyer clicks the green OK button to save information.

The following procedure is used to remove a vendor from BIDDING hold.

If a vendor has been placed on BIDDING hold because the original contract has expired and/or a new contract has yet to be entered, the BIDDING hold must be removed once the contract information has been entered or updated.

1. From the Search Criteria screen, the Buyers clicks the General tab at the bottom of the screen.
2. The Buyer clicks the green OK button and deletes "BIDDING" from Status 1 at the bottom, right side of the screen.
3. The Buyer clicks the green OK button to save information.

Locating Contract Information

The following procedure is used to locate contract information for FISD RFPs, CSPs, and RFQs.

1. Information regarding FISD RFPs, CSPs and RFQs is in FISD's bidding system, Ion Wave. <https://fisd.ionwave.net/HomePage.aspx>
2. Once in Ion Wave, the Buyer clicks Bids at the top of the screen.
3. The Buyer types the first three numbers of the bid number in the box titled, Bid Number (left side, mid screen) and hits enter.
4. Once the bid appears, the Buyer clicks the RFPs, CSPs or RFQ number.
5. The Award Details tab allows the Buyer to view vendors who have been awarded the bid or RFQ.
6. Once it has been verified that the vendor has been awarded, the Buyer clicks the Documents tab to view specific information regarding the bid or RFQ and vendor.
7. Under Documents, the first attachment listed is Bid Invitation. The Buyer downloads and opens this document to view the name of the RFP, CSP or RFQ, award date, extension schedule, expiration date and if the bid or RFQ will be awarded annually or is on automatic renewal.
8. The Buyer closes the Bid Information document and scrolls to find Supplier Response listed alphabetically, by vendor name. *i.e. Supplier Response (Costumes by Dusty, Inc.)*
9. Supplier Response provides vendor contact information and discount information (if applicable) for eFinance Screens 5002-5006. Supplier Response also provides the PO email address.
10. The Buyer closes Supplier Response and scrolls down to the bottom of the screen to locate the Supplier Response Attachment section. Vendor names are listed alphabetically, and files are attached under each vendor name.
11. From Supplier Response Attachments, the Buyer opens the EDGAR and 1295 to

verify each are signed and dated, if applicable. 1295s are not required for publicly traded companies.

The following procedure is used to locate contract information for FISD WQs.

1. The WQ form provides contract and contact information. The Buyer uses this information to complete screens, 5000, 5002, and the PO Email.
2. The Buyer attaches the original WQ document, the awarded Supplier Response document(s) and justification for vendor selection to the vendor file in eFinance. To upload the documents into eFinance, the Buyer:
 - Saves the files on the computer's hard drive.
 - Clicks on the paperclip icon on the Search Criteria screen.
 - Browses to find and attach the document.
 - Names the document and hits enter to save the file.
 - Repeats for each document needed.

The following procedure is used to locate contract information for Sole Source.

1. The Buyer ensures the Sole Source vendor has a current signed and notarized Sole Source Affidavit and attaches the affidavit to the vendor file in eFinance. To upload the documents into eFinance, the Buyer:
 - Saves the Sole Source file on the computer's hard drive.
 - Clicks on the paperclip icon on the Search Criteria screen.
 - Browses to find and attach the document.
 - Names the document and hits enter to save the file.
2. The Buyer enters the expiration date in screens 5000 and 5002. Sole Source agreements expire one year from update.

The following procedure is used to locate contract information for RFPs from other districts.

1. The Buyer contacts the ISD to obtain the following documents:
 - RFP / Contract - The contract will list the name of the RFP, CSP or RFQ, award date, extension schedule, expiration date and if the bid or RFQ will be awarded annually or if it has an automatic renewal.
 - Supplier Response - The Supplier Response provides vendor contact information, discount information (if applicable) and PO email address for eFinance Screens 5002-5006. (EDGARs, 1295 forms, W9s and other information may be attached to the Supplier Response.)
 - Vendor Price Sheet
 - Edgar
 - 1295 (if applicable)
 - Interlocal Agreement
2. The Buyer attaches the documents to the vendor file in eFinance. To upload the documents into eFinance, the Buyer:

- Saves the files on the computer's hard drive.
- Clicks the paperclip icon on the Search Criteria screen.
- Browses to find and attach a document.
- Names the document and hit enter to save the file.
- Repeats for each document needed.

Below is a list of ISDs whose contracts are regularly shared with FISD.

District Contacts	ISD website
Allen ISD	www.allenisd.org
Austin ISD	www.allenisd.org
Carrollton-Farmers Branch ISD	www.cfbpurchasing.com
Dallas ISD	www.dallasisd.org
Denton ISD	www.dentonisd.org
Eagle Mountain-Saginaw	www.emsisd.com
Fort Worth ISD	www.fortworthisd.org
Garland ISD	www.garlandisd.net
Grand Prairie ISD	www.gpisd.org
Grapevine / Colleyville ISD	www.gcisd.net
Irving ISD	www.irvingisd.net
Joshua ISD	www.joshuaisd.org
Keller ISD	www.kellerisd.net
Lewisville ISD	www.lisd.net
Little Elm	www.littleelmsd.net
Mansfield ISD	www.mansfieldisd.org
McKinney ISD	www.mckinneyisd.net
Plano ISD	www.pisd.edu
Richardson ISD	www.risd.org
Sherman ISD	www.shermanisd.net
Lewisville ISD	www.lisd.net
Little Elm	www.littleelmsd.net
Mansfield ISD	www.mansfieldisd.org
McKinney ISD	www.mckinneyisd.net
Plano ISD	www.pisd.edu
Richardson ISD	www.risd.org

Sherman ISD	www.shermanisd.net
Weatherford ISD	www.weatherfordisd.com

The following procedure is used to locate contract information for RFPs from Purchasing Cooperatives.

1. The Buyer enters the purchasing cooperative’s website to look up the vendor and contract information. (Registration and login are required on some sites.)
2. The Buyer saves the following documents to the computer’s hard drive.
 - RFP / Contract - Contract will list the name of the contract, award date, extension schedule, expiration date and if the contract will be awarded annually or if it has an automatic renewal.
 - Supplier Response - The Supplier Response provides vendor contact information, discount information (if applicable) and PO email address for eFinance Screens 5002-5006.
 - Vendor Price Sheet
 - Edgar
 - 1295 (if applicable)
 - Interlocal Agreement
3. The Buyer attaches the documents to the vendor file in eFinance. To upload the documents into eFinance, the Buyer:
 - Saves the files on the computer’s hard drive.
 - Clicks on the paperclip icon on the Search Criteria screen.
 - Browses to find and attach a document.
 - Names the document and hits enter to save the file.
 - Repeats for each document needed.

Below is a list of cooperatives used by FISD.

Cooperatives	Websites
1GPA	www.1gpa.org/
BuyBoard	www.buyboard.com
CCGPF (Collin County)	www.collincountytx.gov/purchasing/
Central Texas Purchasing Alliance	www.txctpa.org
Choice Partners / HCDE	www.choicepartners.org
DIR	www.dir.texas.gov
Educational & Instructional	www.eandi.org
Education Service Centers	
Region 3	www.esc3.net

Region 8 (TIPS)	www.tips-usa.com
Region 10 (MRPC)	www.region10.org
Region 11	www.esc11.net
Region 12	www.esc12.net
Region 19 (Allied State)	www.esc19.net
Region 20 (PACE)	https://programs.esc20.net
EPCNT	www.epcnt.com
General Services Commission (GSA)	www.gsaelibrary.gsa.gov
HGAC	www.hgacbuy.org
NCPA	www.ncpa.us/Vendors
NJPA/Sourcewell	www.sourcewell-mn.gov
NPPGov	www.nppgov.com
Omnia / NIPA / TCPN / US Communities	www.omniapartners.com
Purchasing Cooperative of America	www.ncpa.us/Vendors
Tarrant County PC	www.tarrantcounty.com
TASB	www.tasb.org
Texas Facilities Commission	www.tfc.state.tx.us
Texas Procurement & Support Services	www.comptroller.texas.gov
TX Smartbuy	www.txsmartbuycom

Divestment Look-up Procedure

The Texas Comptroller provides the divestment lists in connection with [TGC 808.051 \(HB 89, 85th R.S.\)](#), [TGC 2252.153 \(SB 252, 85th R.S.\)](#), and [TGC 2270.0209 \(SB 253, 85th R.S.\)](#), and for compliance with contracting requirements referenced in [TGC 2252.152 \(SB 252, 85th R.S.\)](#) and [TGC 2270.002 \(HB 89, 85th R.S.\)](#).

Public procurement professionals are required to verify new vendors are not listed on the divestment lists prior to completing a purchase from a new vendor and to check existing vendors against the lists regularly. The Comptroller updates the lists annually, or more often as the Comptroller considers necessary, but not more often than quarterly.

New Vendor Verification

After the Purchasing Buyer (Buyer) has set-up a new vendor in eFinance, he or she goes to <https://comptroller.texas.gov/purchasing/publications/divestment.php>, opens the lists and verifies the new vendor is not included on any of the divestment lists. Once it has been verified, the buyer enters "YES" in the *D&D Lookup* field on the eFinance contract information page(s) / screens 5002-5006. The "YES" indicates it has been verified that the vendor is not listed on the divestment lists. The buyer then enters an expiration date of one year from the date the lists were checked.

If a new vendor is found to be on one of the lists, the Buyer notifies the vendor that the entity is not eligible to sell products and/or services to FISC and the Buyer places the

eFinance vendor file on “BIDDING” hold.

Existing Vendor Verification

Periodically, throughout the year a list of vendors needing divestment lists checked is run. As the lists are checked, the divestment expiration date is updated.

If a vendor is found to be on one of the divestment lists, the Buyer notifies the vendor that the organization/company is not eligible to sell products and/or services to FSD and the Buyer places the eFinance vendor file on “BIDDING” hold.



ATTACHMENT 1: FRISCO ISD BID PLAN

Solicitation Name & Number: _____

Meeting Date & Department: _____

End User/Director: _____

Purchasing Solicitation Calendar of Events		
Event	Start Date	Completion Date
Budget (approval/questions, confirm funds available)		
Planning Meeting		
Drafting Solicitation		
Department Review & Approval of Solicitation		
Legal Notices Due Date		
Solicitation Issued		
Date Responder Questions Due:		
Responses Checked-in by Purchasing		
Evaluation Meeting/Kickoff		
Vendor Selection, Negotiation & Interviews, if necessary		
Board of Trustees Qualification		
Planned Vendor set up in e-Finance		

1. Needs Assessment

A. Describe the education, business, or research need for the solicitation (background information).

B. Is the solicitation required by federal or state regulation or statutes? By local policy and procedures?

C. Is this for a service? Does FISD have the staff or resources to provide the service?

D. Will this be a one-time RFP or an RFP with the option to extend for several years? Note – In order for the RFP to be extendable, the project needs must be the same from year to



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year. For example, you may update the quantities or schools involved but the scope of work and equipment can not change year to year.

- E. **(CN only)** Is this for equipment? If yes, standard hourly price for maintenance not covered under warranty, including service call cost will be requested. A catalog price list will be requested for possible parts needed for equipment repair.

- F. **(CN only)** Are samples needed to this bid? If yes, indicate requirements for samples and where they should be sent.

- G. **(CN only)** Only Will the product or service require warranty? What is the standard minimum warranty required? All manufacturers must provide documentation of their warranty for CN to keep in their files.

- H. **(CN only)** Will any special test equipment or tools be required by the vendor? Do we need to buy additional equipment in order to make the food product available for sale? Do you need any special tools or gauges to track maintenance schedules?

****Frisco Independent School District employees or former employees that have been employed by the District in the last calendar year, cannot be solicited for vendor qualification. I agree that my department will not knowingly recommend these employees or former employees.

I. Independent Contractor vs. Employee Verification:		
True / False	T	F
The worker may receive assignments from multiple supervisors/end users.		
The worker/individual is reimbursed by Fisd if the worker/individual pays substitutes or helpers.		
The worker/individual will be paid a flat fee as outlined in their bid proposal and/or final quote for services.		
The worker will receive payment from the Fisd Accounts Payable Department.		
The worker/individual will be employed only for the duration of the specific project.		
Frisco ISD will not provide; off contract days/paid vacation, sick pay, paid holidays, personal days, insurance, or retention bonuses.		

2. Procurement Method



- A. What is your estimated budget for this project?

- B. **(CN only)** Have you conducted a cost-analysis and determined forecasted estimated quantities needed? **The Purchasing Department will need this information before writing a bid.**

- C. Do you know of more than one vendor that provides products and/or services that meet your needs?

- D. **(CN only)** Have you confirmed whether the product or service may be purchased on an as-needed basis? Or is this a product or service requiring a commitment to purchase or contract?

- E. **(CN only)** Have you confirmed whether the product or service is a custom item or standard and may be bought off the shelf? Will you include labor in any contract that you sign for this? We encourage you to ask the vendor for one price inclusive of all expenses required to provide the finish products to Frisco ISD.

- F. **(CN only)** Do you know other school districts that purchase similar goods and/or services? Have you worked with MRPC or Choice Partners to identify vendors on cooperative contracts? If yes, did you participate in forecasting required for the cooperative bid?

- G. Planned procurement method based on dollar value and availability of like goods and/or services?



What other departments of campuses should be included in the project planning?	
#1	
#2	
#3	
#4	

Does the project affect facilities? Have you confirmed with construction or maintenance that they do no need to be involved with this project?

4. Solicitation/Contract Scope of Work

A. Describe the scope of work.

The SOW defines the activities the vendor will complete. It includes a schedule for the services to be provided and information on the location where the services will be given. Payment terms and conditions are part of the SOW. The SOW also sets quality and quantity standards you expect the vendor to meet.

B. (CN only) Will vendor walk throughs be required? What location(s) and who will be present? Do you have an estimated length of time for walk through?

C. (CN only) Do you have a planned date/time for walk throughs?

D. (CN only) Do you need representatives from Construction, Maintenance, Risk Management, etc.



A. The SOW includes the following products:

B. The SOW includes the following services:		
	Training to use products in this bid	Direct instruction to students at school
	Professional Development for teachers, administrators, counselors, etc.	Direct instruction to students off-site
	Service provider	Services to support student extracurriculars
	Consulting, strategic planning, analysis	Technology services, incl. programming
	Technical support services	Other:
	Professional Services	
	Legal services	
	Land surveyor, architect, engineers	
	Medical professionals (doctors, nurses, optometry, psychiatry, etc.)	
	Accountants, fiscal agents	
	Technology consultants	
	Real estate appraisers	
	Construction services	
	Other professional services not identified by name in TEC, TGC.	

C. Do you have additional information about products and services needed?

D. This project does not include:

E. How quickly do you want the vendor to provide the good and/or services? What are the quality and quantity standards you expect your vendor to meet?



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- F. Will removal, installation, and clean-up requirements and materials needed be different at each site?

5. Technology

- A. What are the technology needs of this project?
- B. Have you met with the Technology Department about this project?

- C. Will all technology interfaces be provided as a web service, no client installs? Will the entire program share a common interface?

- D. Will all user administration activities be web based?

- E. Will your project have annual technology subscription price increases?

- F. How will any new technology purchased interact with current FISD technology, such as e-Finance, Power School, the FISD portal, grade reporting systems, the data warehouse, and required state level reporting systems?

- G. Will vendors have access to student data? If yes, what data and what data source will be used? Have you talked to the Legal Services Department about a data-sharing agreement, if needed?



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6. Deliverables

What deliverables will the vendor provide? (deliverables = equal goods or services that must be provided upon the completion of a solicitation. Deliverables can be tangible or intangible in nature.

7. Evaluation Team (selected by the end-user)

Identify 3-5 people who evaluate all bid responses or proposals based on the evaluation matrix and weights assigned to each category of the evaluation plan.

Name:		Title:
1.		
2.		
3.		
4.		
5.		
Alternate:		
Alternate:		
Alternate:		

All evaluation team members will complete the FISD Non-Disclosure and Conflict of Interest Statement for staff participating in the planning, development, solicitation, evaluation and/or award of contracted goods and services on behalf of FISD.

8. Award Criteria

Evaluative criteria and relative weights: The evaluation criteria that shall be considered by FISD in its decision to award a contract or bid are as follows. The maximum score a vendor can receive is 100 points. Staff must review the basic evaluation tool and decide which elements are most important for the planned procurement and assign points based on importance.

Review cost / price analysis information on page 9 if you are using Federal funds.

Bid/Proposal Evaluation Tool		
Solicitation Name & Number:	Point Values	
44.031(b)(1): The Purchase Price		
#1		
#2		
#3		
#4		
44.031(b)(2): The reputation of the vendor and of the vendor's goods and services		
#1		
#2		
#3		



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#4		
44.031(b)(3): The quality of the vendor's goods and services		
#1		
#2		
#3		
#4		
44.031(b)(4): The extent to which the goods/services meet the district's needs		
#1		
#2		
#3		
#4		
44.031(b)(5): Vendor's past relationship/past performance with FISD		
#1		0
#2		
#3		
#4		
44.031(b)(6): Impact on the ability of FISD to acquire the vendor's goods and services		
#1		
#2		
#3		
#4		
44.031(b)(7): Long-term cost of buying the good and services, to include annual renewals, maintenance, upgrade, ongoing training, etc.		
#1		
#2		
#3		
#4		
44.031(b)(8): Texas-based company: For a contract for goods and services, other than goods and services related to telecommunications and information services, construction and maintenance, or instructional materials, whether the vendor or vendor's parent company or majority owner: (A). has its principal place of business in this state; or (B). employs at least 500 people in the state of Texas.		
44.031(b)(9): Other relevant factors		
#1		
#2		
#3		
#4		
TOTAL POINTS		100

A. Will you invite vendors to a finalist interview or presentation at FISD that will be evaluated by staff?



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B. Do you plan to have the staff evaluating proposals evaluate finalist presentations? If different staff, who? And what is the justification for inviting additional staff to evaluate presentations?

C. If yes, will the evaluators use the same criteria to score presentations as above?

D. If not, what criteria will be used? Provide information about how staff will evaluate presentations/interviews.

E. Will you provide a set of questions to every vendor for the presentation?

F. Will the presentation be a standard format? (1-hour: 30-minute presentation and 30-min Q&A).

1. What documents do you want applicants to provide for purposes of evaluation?

The Buyer collaborates with campus and department staff to develop a plan for completing reference checks for high-scoring vendors, as necessary.

- Curriculum Vitae, Resumes, Staff Credentials, Staffing Plan
- Proposal only (do you want to limit proposals to 5, 10, 25 pages?)
- Description of facilities/Examples of past projects
- List of services offered
- Hours of operation
- Other items: _____

9. Review and select the most appropriate evaluation method.		
Market Basket 1	Total Price Cost Analysis & Evaluation Scoring for All Products (scoring based on aggregate total cost or by line item total)	
Market Basket 2	Simplified Total Cost Analysis (based on representative sample of all products. <i>This analysis and scoring evaluation are based on a representative sample of all products. (sample must include the following: Aggregate value of at least 75% of the total estimated value of the contract and; Highest value products from the list of products to be procured).</i>	
Award by Line Item	Multiple vendors may be awarded as each line item will be awarded to vendor offering best value.	



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Multiple Award	Multiple vendors with like or similar products and services will be qualified to meet FISD need. End users must get quotes when making purchases.	
Ranking Multiples	Vendor submissions are ranked, and highest scoring vendor is qualified. End users do not need quotes but must use highest scoring vendor. Secondary, tertiary qualifications on file to ensure we can meet FISD needs.	
Single Award	FISD will award a contract to only one vendor.	



Federal Funds: Cost/Price Analysis

Federal regulations require documentation of cost or price analysis for every purchase of \$50,000 or more (2 C.F.R. § 200.323). Complete this form to confirm that the offered price is fair and reasonable. It will be included in the final RFP documentation file. It confirms that the solicitation was conducted according to state and federal laws.

Documentation of cost/price analysis may include:

1. Historical cost: past invoice or purchase order, pricing from cooperative documents or past RFPs
2. Current quote is comparable to the market: documentation of lowest price or price comparison, pricing from RFP, or pricing found through online search

1. General Information	
Solicitation # & Name:	
End-User filling out Cost Analysis:	
Requesting Department/Office/School:	
Date:	

2. **Describe the goods and/or services being purchased:** Provide enough detail to clearly convey what is being purchased to an auditor or other stakeholder (product name, model number, accessories, etc.; service type and enough specifics to define the Statement of Work). You may add additional pages or attachments to this form.

3. **What were the three most competitive quotes/proposals solicited and received:** (Even when suppliers are eliminated because of capabilities, it should be documented that they were contacted and considered. If the total price has been discounted, show the discount terms so that the original or list price can be determined.)

4. Supplier/Vendor Selected	
What criteria did you consider when selecting the vendor?	
	The vendor had the lowest price (at least two comparable and acceptable bids were received, and the low bidder was selected).
	Supplier provided the best evaluated responsible offer (not lowest price). Multiple vendors provided responses/quotes. The one selected was better, but it was not lowest price (provide copies of quotes and/or the evaluation).



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	A single source among several was selected because the vendor has specialized products or services (provide the TDA sole source approval).
	The purchase was an emergency and the items/services were not competitively purchased (an emergency is a purchase needed for the safety and security of students, staff, facilities, and inventory).
	The vendor was selected because it provides products compatible with ones Frisco ISD has purchased (identify the existing system(s) and its location(s)).
	We selected the only vendor that met with the performance standards or other specifications in an emergency. (attach quotes and/or the evaluation).
	The vendor is the only manufacturer/seller of these goods and/or services (document how you sought other sources for the products and services).
	Other. Attach an explanation as to why the vendor was awarded.

5. How did you determine the price was reasonable?

Adequate price competition/Best Value	Comparable to Price Sold to Fed. Gov't. Such as GSA
Catalog/Market pricing	Historical pricing (Provide previous PO#)
Comparison to in-house estimate	Comparison to similar items (Example Amazon has several prices on same item)
Comparable Customer's Invoice cost in our system	Cost analysis (The math behind your findings)

6. Does the award identify specific items, persons and/or prices? Provide a copy of the quote request or solicitation award.

7. Provide a summary of your actions to determine reasonableness.

8. Did you try to negotiate price with the vendor?

Documented Negotiated Cost			
Supplier Quotation	Past Price	Negotiated Price	Savings (Quotation less Negotiated)
\$	\$	\$	\$

9. Cooperative Records (Piggyback use only):	YES	NO	YES	NO
			Attached:	
Verification of lowest bidder:			Attached:	



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Jurisdiction's Approval Authority:			Attached:		
Standard TDA/USDA certs & assurances signed by vendor			Attached:		

10. Competitiveness:	YES	NO		YES	NO
Phone Calls to Check Pricing:			Attached		
Email Quotes:			Attached:		
Check Other Contracts:			Attached:		
Price Indices: (Average change in price through a period or location)			Attached:		
Bid Tabulation:			Attached:		
Other Competitive Advantage:			Attached:		

11. Additional Information:

12. Review and Acceptance of Cost and/or Price Analysis		
Review/Approvals	Name:	Signature:
Person completing form:		
Child Nutrition Director:		
Buyer review:		
Purchasing Director:		



FRISCO ISD BID PLAN

10. FISD Staff Roles & Responsibilities	
Role	Responsibilities
FISD Purchasing Department Purchasing/ Buyer	<ul style="list-style-type: none"> • Develop and review specifications with input from our subject matter experts. • Develop and review scopes of work with input from subject matter experts. • Identify and select legal, most appropriate and efficient procurement method. • Forward all documents for end-user approval. • Prepare and advertise solicitations. • Prepare and send invitations to bid to vendors registered in the FISD Ion Wave system; prepare invitations to bid to provided vendor email addresses; and research pathways to access additional vendors to send invitations to bid to. • Serve as the primary point of contact for communication with vendors regarding all matters pertaining to the issued solicitation. • Collect and review completed and signed evaluator Non-disclosure and Conflict of Interest forms and Evaluator Guidelines before the evaluation period. • Provide evaluators the evaluation matrix and proposals in electronic format. Ensure Purchasing collects all evaluation materials and proposals after the evaluation period. • Provide guidance to evaluation team members and facilitate effective evaluations. • Prepare board agendas • Prepare and complete qualification award documents.
End-user Department Contract Manager and/or Director	<p>Perform the following activities in conjunction with the Purchasing Buyer:</p> <ul style="list-style-type: none"> • Participate with the Purchasing team in solicitation • Collaborate with other departments to ensure the request for bid or RFP clearly states all FISD requirements needed for the project. development and review of all contract documents. • Define any special terms and conditions for the solicitation. • Provide input for specifications and scope of work. • Review and approve the solicitation draft before it is issued. • Select and appoint evaluation team members; complete timely evaluation before the scheduled board agenda is required. • Provide the Purchasing/Buyer with email addresses of target vendors to invite to submit a bid; provide Purchasing with any additional resources for identifying other vendors that provide like goods and services. • Verify the accuracy of invoices and authorizing payments consistent with the contract terms. • Provide information to Legal Dept as necessary

Attachment 2—Requisition Review Items

Open the RQ Approval Queue:

1. Ensure Vendor Field is complete for all RQ's in Queue
2. Ensure Buyer Field is complete for all RQ's in Queue.
3. Review/Confirm PO email address

Open a RQ, Review following

items:

1. Description
 - A. What are they buying?
 - B. Is item covered through current contract used by FISD
 - C. Does the description include FISD requirements?
 1. NTE or Blanket PO in Description if needed
 2. Description of event if NTE
 3. Description of purchase if Blanket PO
 - a) Department versus campus?
 - b) Blanket approval email, if needed
 - c) Or, rate * hours = total for a service under contract
 - d) Is it an allowable blanket based on green book?
 - D. Are there 25 lines or less in description
 - E. Does description match quote description provide by the vendor?
 - F. Can vendor understand what is being ordered?
2. Quantity/Unit/Item total Columns:
 - A. Does Quantity, Unit Price and Item total match the Quote provided by vendor?
 - B. Do Blanket PO's utilize this section?
 - C. Does pricing match the vendors bid price or updated pricing?
3. REQ total
 - A. Does RQ Total match Quote total provided by vendor?
 - B. Does the RQ total require 1-3 quotes, and are required quotes attached?
4. Approval Groups:
 - A. Ensure toner Purchases went through Campus/Tech approval group
 - B. Ensure Fed fund 200 series went through compliance approval group For Federal grants
 - C. Ensure state grants go through compliance approval group
 - D. Ensure Technology Purchases are made by Technology
5. Alt Pay Requirements:
 - A. Verify RQ is NOT a reimbursement to an employee, parent, or student.
 - B. Verify RQ is NOT a membership fee being paid in advance.
 - C. Verify End User is NOT wanting a check to make payment (at the door).

6. Comments Section:
 - A. Ensure Accurate Comment regarding NTE, Blanket PO, Attachment, and Pick Up Check
 - B. Verify any that say, “pick up check” and ensure they are correctly using phrase and system.
7. Identify non-compliant purchases
 - A. Did services start before PO was issued?
 - B. Did we receive items before PO was issued?
 - C. Did services start before the contract was signed?
8. Attachments
 - A. Travel approval forms—IST approval, agenda, etc.
 - B. Correct number of quotes attached
 - C. Contracts
 - D. Registration forms
 - E. 865 Student minutes/approval form
 - F. Non-Compliance forms
 - G. Grant Approval forms
 - H. 911 COVID form
9. Vendor Page
 - A. Vendor is current
 - B. Contract is current
 - C. Vendor accepts PO's
 - D. Correct vendor is being used for the purchase

Attachment 3—Alt Pay Review Items

1. Intra-District Mileage

- A. Use the standardized Intra-District Travel Log form found in the resource center. Handwritten forms are not acceptable.
- B. Make sure to use the most current form with the current mileage rate.
- C. Make sure employee name and ID # on mileage form matches the req.
- D. Make sure mileage & dollar amount on req matches the attachment.
- E. Check budget & account codes.
- F. Check to make sure the form is signed by the employee & supervisor.
- G. Make sure lines are completed and accurate.
- H. Do not need a Google map to show mileage.
- I. This form shows the mileage and dollar amount on the bottom of the form.

2. Local Mileage

- A. Use the standardized Local Travel Log found in the resource center. Handwritten forms are not acceptable.
- B. Make sure to use the most current form with the current mileage rate.
- C. Make sure employee name and ID# on mileage form matches the req.
- D. Make sure mileage & dollar amount on req matches the attachment.
- E. Check budget & account codes.
- F. Check to make sure the form is signed by the employee & supervisor.
- G. Make sure lines are completed and accurate.
- H. Google/MapQuest maps or odometer readings are required.
- I. This form shows the dollar amount on the top right of the form.

3. Employee Check/Travel Reimbursement Form

4. Out-of-state/Overnight Travel Approval

Requisition attachments must include:

- A. If overnight stay is out-of-state or within a 50 miles radius of the home campus, an approval from an IST member via email or overnight travel approval form is required.
- B. Use the standardized Check Request/Travel Reimbursement form found in the resource center. Handwritten forms are not acceptable.
- C. Google or MapQuest map if needed for mileage reimbursement
- D. Receipts for; airfare, hotel, conference registration, parking, toll, car rental, gas, (only for district vehicles and rentals) and other qualified reimbursable expenses.
- E. Agenda/itinerary/email for conference explaining reason for travel.
- F. If meals are requested for a conference, a conference agenda is needed to verify

that meals were not provided.

Before approving the requisition:

- A. Make sure employee name and ID # on the check request form matches the req.
 - B. Make sure departure dates, city & state, and purpose of travel is filled out.
 - C. Check to make sure the form is signed by the employee & supervisor.
 - D. Check receipts for requesting reimbursements.
 - E. Make sure lines are completed and accurate.
 - F. Check budget & account codes.
 - G. Employees are only allowed (2) meals on travel days (departure/arrival). If traveling with students, employees are then eligible for the same number of meals as the students.
 - H. Employees are only allowed (3) meals per diem on overnight day(s) and (1) incidental per overnight hotel stay. If traveling with students, employees are then eligible for the same number of meals as the students.
 - I. Employees will not be reimbursed for meals that are included in the conference.
5. Employee Check/Travel Reimbursement Form

Day Travel 50-mile radius and other reimbursements

Requisition attachments must include:

- A. Use the standardized check request/travel reimbursement form found in the resource center. Handwritten forms are not acceptable.
- B. If overnight stay is requested, an approval from an IST member is required.
- C. Google or MapQuest map if needed for mileage reimbursement
- D. Receipts for meals, parking, tolls, conference registration, and other qualified reimbursable expenses.
- E. Agenda/itinerary/email for conference explaining reason for travel.

Before approving the requisition:

- A. Make sure employee name and ID# on the check request form matches the req.
- B. Make sure departure date, city & state, and purpose of travel is filled out completely.
- C. Check to make sure the form is signed by the employee & supervisor.
- D. Check receipts for requesting reimbursements.
- E. Make sure lines are completed and accurate.
- F. Employees will not be reimbursed for meals that are included in the conference.
- G. Employees are only allowed (2) meals on travel days (departure/arrival). If traveling with students, employees are then eligible for the same number of meals as the students.
- H. Check account & budget codes.

6. Student Meals Check/Travel Reimbursement Form

Note: Most student meals are from Athletics, Fine Arts & CTE

Requisition attachment must include:

- A. Use the standardized check request/travel reimbursement form found in the resource center. Handwritten forms are not acceptable.
- B. If out of state an overnight approval from an IST member via email or overnight travel approval form.
- C. Students roster including coach/sponsor.
- D. Event Itinerary.

Before approving the requisition:

- A. Make sure employee name and ID # on the check request form matches the req.
- B. Make sure departure date, city & state, and purpose of travel is filled out.
- C. Make sure the student roster matches attachment and req.
- D. Make sure lines are completed and accurate with student and coach/sponsor lunch amounts itemized by breakfast, lunch & dinner.
- E. Check budget & account codes
- F. Check to make sure the form is signed by the employee & supervisor.

7. Camp/Event Deposits

Note: Most deposits for all pays are field Trips, camps & proms

Contract/invoice must be attached to the *requisition*.

- A. Make sure the contract is signed by Susan Patterson (if applicable)
- B. Make sure the deposit matches the attachment and req.
- C. The remaining amount due, that will be paid after the deposit, must match the attachment and req.
- D. Check budget & account codes
 - 1) 6412 - Student travel
 - 2) 6411 - Staff travel
 - 3) 6419 - Non-staff travel
 - 4) 6499- other misc. Deposits, license fees
 - 5) 6269 – facility rental