

COLLEGE STATION ISD

PURCHASING

USER HANDBOOK

and

POLICY & PROCEDURE MANUAL

2021 – 2022

PURCHASING USER HANDBOOK and POLICIES AND PROCEDURES

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COLLEGE STATION ISD PURCHASING DEPARTMENT

9304 Rock Prairie Road, College Station, TX 77845
Purchasing Phone: 764-5408 Warehouse Phone: 764-5541

- Carmella Shafer**, RTSBA, Director of Purchasing Email: cshafer@csisd.org
- Jennifer Byroad**, Purchasing Specialist Email: jbyroad@csisd.org
- Jennifer Hairell**, RTSBA, Buyer/Textbook Specialist Email: jenniferhairell@csisd.org
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- Jarius San Angelo**, Warehouse Supervisor Email: jsanangelo@csisd.org
- Chris Lightsey**, Lead Courier
- John Ybarra**, Courier
- Jose Rivera**, Courier
- Robert Ford**, Part-Time Courier
- Robert Taylor**, Part-Time Courier

Purchasing:

- Establish annual bids for commonly used commodities
- Coordinate participation in established purchasing cooperatives and state contracts
- Solicit quotes or bids for purchases with an aggregate total of \$10,000 or more

Warehouse/Central Receiving

- Receive and deliver all incoming freight
- Stock commonly used items (paper, pens, folders, etc.)
- Move furniture and other equipment from campus to campus or to the warehouse
- Pick up and deliver bank deposits for schools
- Pick up and deliver mail
- Pull and deliver weekly food orders to cafeterias
- Pick up and deliver cafeteria bags for schools

Instructional Materials

- Order, distribute, collect, and inventory instructional materials for district

Surplus Property

- Collect, store, sell and dispose of surplus property for district

Records Retention

- Oversee records storage and destruction

Recycling

- Oversee district recycling of paper products

**COMPETITIVE
PROCUREMENT
GUIDELINES**

Competitive Procurement Guidelines

\$1-\$9,999: Quotations from multiple vendors not required but encouraged to obtain best value or use of district approved annual bid, cooperative, inter local agreement or state contract.

\$10,000-\$49,999: Written quotations from at least two vendors secured and attached to the requisition or use of district approved annual bid, cooperative, inter local agreement or state contract, if using state or local funds. If using federal funds, then 2 quotes minimum are required.

\$50,000+: Formal competitive procurement method shall be used, or use of current district approved annual bid, cooperative, inter local agreement or state contract. One of the following competitive procurement methods that provides the best value for the district shall be used and coordinated by the Director of Purchasing.

- Competitive Bidding
- Competitive Sealed Proposals
- Request for Proposal
- Inter local Agreement
- Purchasing Cooperative
- State Contract

Competitive Bids or Proposals for purchases over \$50,000 in the aggregate for each 12-month period must be advertised once a week for at least two weeks in the local newspaper prior to the bid opening. Bid opening must be at least two weeks from the date of the second publication.

Individual purchases of \$50,000 or more must be approved by the Board of Trustees.

If using federal funds, then 2 quotes minimum are required.

\$250,000+: Purchases with federal funds require the Purchasing Department to perform an Independent Estimate Determination prior to advertising for bids or proposals and a Cost and Price Analysis prior to awarding or entering into a contract. In determining costs, do not use the cost plus a percentage of cost and percentage of construction cost methods of contracting. All costs subject to this analysis must be allowable under the grant program. The contractor's profit must be negotiated as a separate element of the total price.

As stated in the TEC, §44.031(b), in awarding a contract, a district shall consider: • purchase price • the reputation of the vendor and of the vendor's goods or services • the quality of the vendor's goods or services • the extent to which the goods or services meet the district's needs • the vendor's past relationship with the district • the impact on the ability of the district to comply with laws relating to historically underutilized businesses • the total long-term cost to the district to acquire the goods or services • for a contract that is not for goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, if the vendor or the vendor's ultimate parent company or majority owner has its principal place of business in this state or employs at least 500 persons in this state • any other relevant factor specifically listed in the request for bids or proposals. The Definition of Best Value Best value can be better defined to make an award of a procurement other than solely based on price alone. Though price may be considered a high-level concern to the district due to budgetary constraints, other factors may include the reputation of the vendor (e.g., references), the experience with the vendor in previous contracts with the district, the ability of the vendor to meet the needs of the district, or any other criteria the district may determine to be in its best interest. To determine which criteria should be considered the most important, weights or points can be assigned to

each criterion based on how important it is. Here is an example of how points could be broken down. Each solicitation is unique so modifications will be made to the criteria used and the points assigned to each. The use of 100 points is a good standard to follow. However, any point structure will work. Weighted pricing will be used to determine how price points are assigned. The formula to calculate price points is: $(\text{Lowest Responsive Bid} / \text{Vendor's Bid Price}) \times \text{Assigned Points} = \text{Vendor's Points for Price}$. Each competitive procurement includes the evaluation criteria with assigned points/weights. To select the offeror that offers the best value for the district based on the published selection criteria and its ranking evaluation. In determining the best value for the district, we are not restricted to considering price alone but may consider any other factors stated in the selection criteria. First attempt to negotiate a contract with the selected offeror. May discuss with the selected offeror options for a scope or time modification and any price change associated with the modification. If unable to negotiate a satisfactory contract with the selected offeror, the district should end negotiations with that offeror, formally and in writing, and proceed to the next offeror in the order of the selection ranking until a contract is reached or all proposals are rejected.

Opening Bids: Bid opening date, time, and location is in every request for competitive procurement. Publicly open, and read aloud the names of the offerors, and all prices stated in each proposal, if any are required to be stated. Evaluate and rank each proposal submitted in relation to the published selection criteria no later than the 45th day after the date on which the proposals are opened.

The district uses an electronic bidding software for the preparation, submission, and evaluation of competitive procurements. The system keeps bids sealed until the closing date and time for the bid. Purchasing staff unseal the bids and download the supplier responses.

Exceptions to Competitive Procurement Requirements:

- Approved Sole Source Purchase by the district (local funds) or TEA (federal funds). The Purchasing Department will make the first determination if a product is or is not a sole source. If it is determined to be a sole source purchase and federal funds are being used a TEA sole source request will be submitted to TEA by the Grant Manager.
- Professional Services approved per state or federal statutes.
- Emergency resulting from unforeseen catastrophe that would substantially prevent or impair conduct of classes or school activities. Requires board action prior to use as a sole source or exemption from using competitive procurement.

Please note all federal purchases will be aggregated by fiscal year by Commodity Code/Like Type Item. When we reach the \$25,000 total purchases by Commodity Code/Like Type Item the purchase is then considered a Small Purchase and 2 quotes are required. The district defines the Commodity Codes/Like Type Items, but a single PO or single vendor purchases cannot be considered an item. ([TEA-TAA-11.29.18](#))

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**PURCHASING,
RECEIVING,
AND
PAYMENT PROCESS & FLOWCHART**

PURCHASING AND RECEIVING PROCEDURES

Purchasing:

1. One designated person per department or school should be responsible for the entering of requisitions. Requisitions should include an adequate description (manufacturer, part number, size, etc.) of the materials being purchased.

Requisitions must reference the applicable bid, purchasing cooperative or quote number from which the prices were obtained. The bid number should be entered in the comments section of the requisition. A quote number will be entered in the notes section. It is highly recommended that each purchased line item be entered in eFinance Plus rather than using an attached list. This assures that all items are properly received and paid for.

2. The principal or department head or their designee should be responsible for approving each requisition. Each requisition should be checked to make sure proper rules were followed and awarded vendors were chosen. When written quotations are required, they should be attached to the requisition in eFinance Plus and a copy filed or saved in a central location at the school or department.
3. Approved requisitions will be converted to Purchase Orders within 24 hours for review and signature. Approved purchase orders will be signed and faxed or emailed to the vendor based on notes entered in the requisition. Copies of the purchase order will then be distributed to the originator.
4. Many vendors have been awarded multiple bids/contracts by multiple purchasing cooperatives, so we recommend requesting quotes from multiple vendors and ask that they give the best pricing available and note which purchasing cooperative bid the pricing is based on.

With our vendor list continuing to grow it is important that we utilize vendors, whenever possible that have been awarded bids or who participate in the district approved annual bids, purchasing cooperatives or Inter local agreements. This will assure competitive prices and more efficient receiving and payment procedures. If you have a question about which vendors are awarded/approved, please visit the Purchasing Department web page or call or email the Purchasing Department. An approved vendor must have been awarded a bid by the district, purchasing cooperative, state contract or inter local agreement that has not expired.

Receiving:

1. Some shipments from local vendors are delivered directly to the school or department. It is the responsibility of the school or department to verify receipt and forward the signed and dated green receiving copy of the purchase order to the Business Office.
2. All shipments from out of town vendors will be received at Central Receiving and re-delivered to the appropriate campus or department. Each school or department is responsible for opening boxes and confirming that shipments are received in full.
3. For out of town orders it is the responsibility of each school or department to verify receipt and forward the signed and dated green receiving copy of the purchase order to the Business Office. This notification must be made within three (3) days of receipt of goods. One person at each school should be responsible for this task. If a shortage or incorrect merchandise is discovered the school or department should contact the vendor immediately to have the problem corrected.
4. Partial Shipments are when an order is received but **Not complete - (Partial)**
 - Verify which items were received.
 - Make note by **the items that were NOT received** on the purchase order as:
 - Back order
 - Contact vendor to get an expected delivery date on backordered items.
 - Have the items been canceled?
 - Were items damaged?
 - Were items returned?
 - Make a copy of the Green purchase order and write **PARTIAL**
 - Date the items received and sign the white partial
 - Make a copy of the Green purchase order and write **PARTIAL** on the white copy
 - Attach all receiving documents, Packing Slips, Invoices, Receipts to the **PARTIAL** purchase order copy
 - Send the Partial purchase order and attachments to the business office.
5. Running PO's
 - Write on the front, left hand side, of the **YELLOW** copy of the purchase order the
 - Date
 - Invoice number
 - Description of items purchased
 - Invoice amount
 - Balance of purchase order
 - Make a copy of the green on **white** paper
 - Sign and date the day received
 - Write **PARTIAL** on the white copy
 - Attach invoice or receipt to the white copy of the purchase order
 - Send to Business Office for processing
 - **IMPORTANT: Additional funds cannot be added to a running purchase order. Running purchase orders will be closed when all funds on the PO are spent.**
When green purchase orders are received in the business office the purchase order is closed and remaining balance(s) are returned to the budget unit on the purchase order.

Payment:

The Prompt Payment Statute (Local Government Code 2251) requires school districts to pay for goods and services within 31 days of invoice date or the vendor is entitled to be paid interest on the overdue amount. This statute, effective September 1993, is now common knowledge among vendors who are aware of their right to be paid in a timely manner. One invoice in past due status can put an entire district on hold and suspend shipments from a vendor. CSISD depends on vendors to furnish products and services in a timely manner. It is our responsibility to pay these vendors in a timely manner.

CSISD Procurement & Payment Process



AWARDED VENDORS

**Current awarded vendor list is located
on Google Drive: [Awarded Vendors
and Contracts List](#)**

Vendor	Contract Name	Contract Number	Start Date	Current Expiration Date
AlphaGraphics (formerly known as Tops Printing)	Printing Services	RFP #22-001	11/17/21	10/31/23
Accelerate Learning Inc	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Amanda Morgan - Not Just Cute	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
AVID Center	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Barnes & Noble Booksellers, Inc	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Benchmark Education Company LLC	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Capstone Classroom	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Comprehensive Training Center	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Explore Learning, LLC	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Happy Numbers, Inc.	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Hayes Software Systems	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Kindermusick International, Inc.	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Lakeshore Learning Materials	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Lead4ward, LLC	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Learning A-Z, LLC	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Loving Guidance DBA Conscious Discipline	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Mentoring Minds, LP	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
SAVVAS formerly NCS Pearson	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Piraino Consulting, Inc	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Responsive Learning, LP	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Rosetta Stone Ltd.	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Seidnitz Education	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Solution Tree, Inc.	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Teaching Strategies, LLC	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
The Flippen Group	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
The Master Teacher	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
The University of Texas at Austin Charles A. Dana Center	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Think Law	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
US Math Recovery Council	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Specialized Assessment & Consulting, LLC	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Valley Speech Language and Learning Center	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Voyager Sopris Learning, Inc.	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Western Kentucky Univ.	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
The Science Toolkit, LLC	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Mackin Educational Resources	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Learning Without Tears	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Ed Tech Team	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
Greenwood Publishing DBA Heinemann	Professional Development Consultant Services and Materials	RFP#18-001	11/17/17	8/31/22
All Creative Promotional Plus	Custom Clothing, Apparel and Promotional Products	RFP #18-007	9/1/18	8/31/22
Blue Ribbon Styles Co.	Custom Clothing, Apparel and Promotional Products	RFP #18-007	9/1/18	8/31/22
BSN Sports	Custom Clothing, Apparel and Promotional Products	RFP #18-007	9/1/18	8/31/22
C.C. Creations	Custom Clothing, Apparel and Promotional Products	RFP #18-007	9/1/18	8/31/22
Cheers, Etc. Inc.	Custom Clothing, Apparel and Promotional Products	RFP #18-007	9/1/18	8/31/22
Elite Sportswear, L.P.	Custom Clothing, Apparel and Promotional Products	RFP #18-007	9/1/18	8/31/22
Gandy Ink	Custom Clothing, Apparel and Promotional Products	RFP #18-007	9/1/18	8/31/22
M&M Apparel / Monograms & More Apparel	Custom Clothing, Apparel and Promotional Products	RFP #18-007	9/1/18	8/31/22
Merge Creative Promotional Specialties	Custom Clothing, Apparel and Promotional Products	RFP #18-007	9/1/18	8/31/22
Positive Promotions	Custom Clothing, Apparel and Promotional Products	RFP #18-007	9/1/18	8/31/22
Ranchhand Designs	Custom Clothing, Apparel and Promotional Products	RFP #18-007	9/1/18	8/31/22
Score Sports	Custom Clothing, Apparel and Promotional Products	RFP #18-007	9/1/18	8/31/22
The Master Teacher	Custom Clothing, Apparel and Promotional Products	RFP #18-007	9/1/18	8/31/22
World of Promotions	Custom Clothing, Apparel and Promotional Products	RFP #18-007	9/1/18	8/31/22
Imagenet Consulting LLC	Copier and Managed Print	RFP#19-001	1/1/19	12/31/22
D&D Electronics	Cabling Labor & Materials	RFB#19-002	1/1/19	12/31/22
McTighe & Associates Consulting LLC	Professional Development for Curriculum	RFP#19-004	12/18/18	12/31/21
Layer 3 Communications	Internal Connections	RFP#19-005	2/20/19	2/19/22
WireStar Inc	Internet Services	RFP#19-006	9/1/19	6/30/22
Cebridge Telecom TX dba Suddenlink	Internet Services	RFP#19-006	9/1/19	6/30/22
Interquest Detection Canines	Canine Detection Services	RFP#19-007	7/1/19	6/30/22
Pizza Hut	Pizza	RFB#19-008	8/1/19	7/31/22
Specialized Public Finance Inc	Financial Advisor	RFQ 20-001	3/5/20	2/20/22
Agile Sports Technologies dba HUDL	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Alert Services, Inc.	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Arbiter Sports, LLC	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Bigger Faster Stronger, Inc	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
BSN Sports, LLC	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
C. C. Creations	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Cardinals Sports Center	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Champion Teamwear	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Clarke Distributing Co.	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Coach Com, LLC	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Custom Sportswear, Inc.	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
East Texas Sports	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22

Vendor	Contract Name	Contract Number	Start Date	Current Expiration Date
Gilman Gear	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Golf Team Products, Inc.	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Gopher Sport, Gopher Performance	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Graphics Store	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Guardian Caps	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
GV Pro Tables	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Henry Schein, Inc.	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Image Maker 4U	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Inzer Advance Designs	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Knockout Sportswear	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
M&M Apparel	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Medco Supply	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
MFAC, LLC (M-F Athletic Company)	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Oates Specialties, LLC	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
OnCourt OffCourt	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Positive Promotions	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Power Lift	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Pro Maxima Mfg	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Ritchey Athletics	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Riddell/All American	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Rogers Athletic Company	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
School Health Corporation	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
School Specialty Inc	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Soccer 4 All	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Sports Imports, Inc.	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Swim Shops of the Southwest	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Texas Letter Jackets (Balfour)	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Texas Swim Shop	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
The Soccer Corner	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Titan Support Systems, Inc	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Varsity Spirit Fashions & Supp	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
VirKim Inc.	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Waterboy Graphics	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Webb Electronics LTD	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Wisstech Enterprises, LLC	Athletic Supplies, Apparel and Equipment	RFP#20-002	6/1/2022	5/31/22
Gateway Printing & Office Supply	Office Supplies, Equip., and Furniture	RFP#20-004	7/1/20	6/30/22
Wilton's Officeworks	Office Supplies, Equip., and Furniture	RFP#20-004	7/1/20	6/30/22
Office Depot Inc	Office Supplies, Equip., and Furniture	RFP#20-004	7/1/20	6/30/22
Staples	Office Supplies, Equip., and Furniture	RFP#20-004	7/1/20	6/30/22
Texas State Billing Services	SHARS Medicaid Billing Services	RFP # 21-002	6/1/21	5/31/22
Alert Services, Inc.	Athletic Trainer Supplies	RFP#21-003	6/1/21	5/31/22
BSN Sports	Athletic Trainer Supplies	RFP#21-003	6/1/21	5/31/22
Medco Sports Medicine	Athletic Trainer Supplies	RFP#21-003	6/1/21	5/31/22
School Nurse Supply	Athletic Trainer Supplies	RFP#21-003	6/1/21	5/31/22
Henry Schein Medical	Athletic Trainer Supplies	RFP#21-003	6/1/21	5/31/22
Riddell/All American	Athletic Trainer Supplies	RFP#21-003	6/1/21	5/31/22
School Health Corporation	Athletic Trainer Supplies	RFP#21-003	6/1/21	5/31/22
Bryan Coca-Cola Southwest Beverages	Beverages	RFP#21-004	4/21/21	7/31/22
Pepsi Beverages Company	Beverages	RFP#21-004	4/21/21	7/31/22
Greater East Texas Insurance Associates	Student Accident/Athletic & Catastrophic Insurance	RFP#20-005	8/1/20	7/31/22
Ace Mart Restaurant Supply	Floral and Craft Supplies	RFP#21-010	7/1/21	6/30/22
American Ceramic Supply Company	Floral and Craft Supplies	RFP#21-010	7/1/21	6/30/22
Armadillo Clay	Floral and Craft Supplies	RFP#21-010	7/1/21	6/30/22
Blick Art Materials	Floral and Craft Supplies	RFP#21-010	7/1/21	6/30/22
Southern Floral Company	Floral and Craft Supplies	RFP#21-010	7/1/21	6/30/22
Teachers Discovery Inc.	Floral and Craft Supplies	RFP#21-010	7/1/21	6/30/22
Texas Art Supply Company	Floral and Craft Supplies	RFP#21-010	7/1/21	6/30/22
ABDO Publishing Company	Library Books	RFP#21-006	8/1/21	7/31/22
Barnes & Noble, Inc.	Library Books	RFP#21-006	8/1/21	7/31/22
Booksouse	Library Books	RFP#21-006	8/1/21	7/31/22
BOUND TO STAY BOUND BOOKS, INC.	Library Books	RFP#21-006	8/1/21	7/31/22
Brodart Co.	Library Books	RFP#21-006	8/1/21	7/31/22
Capstone	Library Books	RFP#21-006	8/1/21	7/31/22
Cavendish Square Publishing, L	Library Books	RFP#21-006	8/1/21	7/31/22
Cengage Learning, Inc.	Library Books	RFP#21-006	8/1/21	7/31/22
Childrens Plus, Inc.	Library Books	RFP#21-006	8/1/21	7/31/22
DBA Cherry Lake Publishing_DBA	Library Books	RFP#21-006	8/1/21	7/31/22
Delaney Educational Enterprises	Library Books	RFP#21-006	8/1/21	7/31/22
EBSCO Information Services	Library Books	RFP#21-006	8/1/21	7/31/22
Encyclopaedia Britannica, Inc.	Library Books	RFP#21-006	8/1/21	7/31/22
Enslow Publishing LLC	Library Books	RFP#21-006	8/1/21	7/31/22
Escue & Associates	Library Books	RFP#21-006	8/1/21	7/31/22
Express Booksellers	Library Books	RFP#21-006	8/1/21	7/31/22

Vendor	Contract Name	Contract Number	Start Date	Current Expiration Date
Follett School Solutions, Inc.	Library Books	RFP#21-006	8/1/21	7/31/22
Gareth Stevens Publishing, LLLP	Library Books	RFP#21-006	8/1/21	7/31/22
Garrett Book Company	Library Books	RFP#21-006	8/1/21	7/31/22
Greenhaven Publishing, LLC	Library Books	RFP#21-006	8/1/21	7/31/22
Junior Library Guild	Library Books	RFP#21-006	8/1/21	7/31/22
Keystone Books and Media	Library Books	RFP#21-006	8/1/21	7/31/22
Lakeshore Learning Materials	Library Books	RFP#21-006	8/1/21	7/31/22
Lerner Publishing Group	Library Books	RFP#21-006	8/1/21	7/31/22
Mackin Educational Resources	Library Books	RFP#21-006	8/1/21	7/31/22
National Educational Systems	Library Books	RFP#21-006	8/1/21	7/31/22
Perma-Bound Books	Library Books	RFP#21-006	8/1/21	7/31/22
QEP Professional Books	Library Books	RFP#21-006	8/1/21	7/31/22
Rainbow Book Company	Library Books	RFP#21-006	8/1/21	7/31/22
Rourke Educational Media	Library Books	RFP#21-006	8/1/21	7/31/22
Saddleback Educational, Inc.	Library Books	RFP#21-006	8/1/21	7/31/22
Scholastic Library Publishing,	Library Books	RFP#21-006	8/1/21	7/31/22
Sebco Books	Library Books	RFP#21-006	8/1/21	7/31/22
Superior Text	Library Books	RFP#21-006	8/1/21	7/31/22
Textbook Warehouse	Library Books	RFP#21-006	8/1/21	7/31/22
The Childs World, Inc.	Library Books	RFP#21-006	8/1/21	7/31/22
The Reading Warehouse Inc	Library Books	RFP#21-006	8/1/21	7/31/22
The Rosen Publishing Group, Inc	Library Books	RFP#21-006	8/1/21	7/31/22
World Book, Inc.	Library Books	RFP#21-006	8/1/21	7/31/22
Ace Mart Restaurant Supply	General Maintenance Supplies	RFP#21-007	9/1/21	8/31/23
Armstrong Repair Center INC	General Maintenance Supplies	RFP#21-007	9/1/21	8/31/23
Baker Distributing	General Maintenance Supplies	RFP#21-007	9/1/21	8/31/23
Batteries Plus Bulbs 428	General Maintenance Supplies	RFP#21-007	9/1/21	8/31/23
Carrier Enterprise	General Maintenance Supplies	RFP#21-007	9/1/21	8/31/23
DEALERS ELECTRICAL SUPPLY CO.	General Maintenance Supplies	RFP#21-007	9/1/21	8/31/23
Elliott Electric Supply	General Maintenance Supplies	RFP#21-007	9/1/21	8/31/23
FASTSERV SUPPLY	General Maintenance Supplies	RFP#21-007	9/1/21	8/31/23
Hughes Supply PC511	General Maintenance Supplies	RFP#21-007	9/1/21	8/31/23
Intelligent Combustion Control	General Maintenance Supplies	RFP#21-007	9/1/21	8/31/23
M S C Industrial Supply Company	General Maintenance Supplies	RFP#21-007	9/1/21	8/31/23
Morrison Supply Company	General Maintenance Supplies	RFP#21-007	9/1/21	8/31/23
VirKim Inc.	General Maintenance Supplies	RFP#21-007	9/1/21	8/31/23
Voss Lighting	General Maintenance Supplies	RFP#21-007	9/1/21	8/31/23
Fastenal	Maintenance Supplies	OMNIA R192001		3/31/23
Ed Phillips Plumbing	Plumbing Services	RFP#21-008	9/1/21	8/31/23
Gowan Garrett Mechanical Inc	Plumbing Services	RFP#21-008	9/1/21	8/31/23
Bayer Construction Electric	Electrician Services	RFP#21-009	9/1/21	8/31/23
BCA Electric LLC	Electrician Services	RFP#21-009	9/1/21	8/31/23
Britt Rice Electric	Electrician Services	RFP#21-009	9/1/21	8/31/23
Palomares Construction Inc	Facility Maintenance Paving Services	RFP#21-011	9/1/21	8/31/23
Jon Tucker Construction LTD	Facility Maintenance Paving Services	RFP#21-011	9/1/21	8/31/23
Fikes Wholesale	Fuel	TAMU#C20201235	9/1/20	8/31/22
Kurz & Co.	Bread	BISD RFP#18-3795	8/1/20	7/31/22
VLK Architects	Bond Planning 2021	RFQ 21-005	03/02/2021	Bond pass/fail

Purchasing Cooperatives

Current awarded vendor list is located on Google Drive: Awarded Vendors and Contracts List -

https://docs.google.com/spreadsheets/d/1jbC3gf3GmvMfUwonL0cCIWkj5L27Vp2_t-pTFj7IT2s/edit?usp=sharing

1. Education Service Center Region 6 Purchasing Cooperative (EPIC6)

Contact: Matthew Reddoch - mreddoch@esc6.net

Website: <http://epic6.net/>

Contract Reference Example: EPIC6 RFP#11.16

Commodities: Instructional, Office, Technology, Library Books, Awards, Musical, Special Education, Athletics, Maintenance

2. Choice Partners (Harris County Department of Education (HCDE) Cooperative)

Contact: Arlita Kyles

Website: www.choicepartners.org/vendors

Contract Reference Example: CP#17/021KC

Commodities: Art Supplies, Audio Visual, Classroom Teaching Materials, Custodial Supplies, Data Processing Supplies, Furniture, Fine Papers, Food Service Supplies, Projection Bulbs

3. Texas Local Government and Statewide Purchasing Cooperative (TASB Buyboard)

Contact: Ken Farmer

Website: www.buyboard.com

Contract Reference Example: Buyboard#291-08

Commodities: Athletic, P.E., AV, Building Maintenance, Technology, Medical, Floor Covering, Food Services, Furniture, Grounds Maintenance, Instructional, Library Books, Modular Buildings, Musical Instruments, Office Supplies, Parks and Recreation, Public Safety, Transportation

4. Education Service Center Region 4 The Cooperative Purchasing Network (Omnia Partners)

Contact: Derek Anderson

Website: www.omniapartners.com

Contract Reference Example: TCPN # R141608

Commodities: Technology, Computer Components and Peripheral Software, Office Supplies, School Supplies, Furniture, AV, Paper Products, Food Service, MRO, Security Screens, Temporary Labor

5. Texas Comptroller of Public Accounts

Website: <http://www.window.state.tx.us>

Contract Reference Example: STMP

Commodities: All items on State of Texas State Contract except Technology

6. Department of Information Resources (DIR)

DIR Website: <http://www.dir.state.tx.us/>

Contract Reference Example: DIR-SDD-890

Commodities: Technology

7. Houston-Galveston Area Cooperative (HGAC)

Contact: Loleta Chappel

Website: www.hgacbuy.com

Contract Reference Example: HGAC #BS08-07

Commodities: School Buses, Cars and Light Trucks, Communications, Maintenance, Emergency, Energy

8. Purchasing Solutions Alliance (PSA)

Contact: Susan Lightfoot

Website: <http://www.psabuy.org/>

Contract Reference Example: PSA#17-204

Commodities: Office Supplies, Computer Supplies, Printing Services, Auto Parts, Custodial, MRO

9. Education Service Center Region 19 Purchasing Cooperative

Contact: Becky Hernandez

Website: www.esc19.net/purchasing/

Contract Reference example: Region 19 #18-7295

Commodities: Microsoft Software, Classroom, Instructional, Office, Maintenance, Athletic, Automotive

10. U.S. Communities- Omnia Partners

Website: <https://www.omniapartners.com/publicsector/contracts>

Contract Reference Example: US Comm #R-TC-17006

Commodities: Facilities, Technology, Recreation and Athletics, Office and Classroom solutions

11. School Purchasing Alliance (SPA)

Contact: Donna Davis

Website: <http://www.schoolpurchasingalliance.org>

Contract Reference Example: SPA #2016-04 Bread

Commodities: Food

12. Education Service Center Region 8 The Interlocal Purchasing System (TIPS/TAPS)

Contact: Karen Walton

Website: <https://www.tips-usa.com/vlist.cfm>

Contract Reference example: TIPS #170302

Commodities: Instructional, Classroom, Office, Safety Equipment and Supplies. Maintenance Supplies, Technology, Food Service Supplies and Equipment

13. Education Service Center Region 20 Purchasing Cooperative - PACE

Contact: Jim Metzger

Website: <https://programs.esc20.net/page/pace.home>

Contract Reference Example: PACE #P00151

Commodities: Art, Custodial, Classroom, Athletics, Maintenance, Technology, Food Service, Equipment, Instructional, Office and Paper supplies

14. Education Service Center Region 20 Purchasing Cooperative-2013 Cooperative (Instructional)

Contact: Michael Garcia

Website: https://www.esc20.net/page/bhrs_PurchasingCoop.Home

Contract Reference Example: Region 20 #7030

Commodities: Instructional

15. National Cooperative Purchasing Alliance (NCPA)

Contact: Jonathan Applegate

Website: www.ncpa.us

Contract Reference example: NCPA #01-65

Commodities: Technology, Cloud, Office & School, Facilities, Construction, Athletics, Playground, Transportation, Medical, Security, Food Equipment, Environmental

16. 1Government Procurement Alliance (1GPA)

Contact: Nancy Mowry

Website: www.1gpa.org

Contract Reference Example: 1GPA #18-06DP-24

Commodities: Instructional, Online learning, Science, Technology, Automotive, Furniture, Playground, Grounds, Janitorial, Transportation, etc.

17. Purchasing Cooperative of America (PCA)

Contact: Elaine Nichols

Website: www.pcamerica.org

Contract Reference Example: PCA #3-189-18

Commodities: Office supplies, Books & Educational Materials, Technology, Art supplies, Athletics, Audio Visual, Insurance, Procurement Services, Uniforms, Playground equipment, Law Enforcement, Etc.

18. Central Texas Purchasing Alliance

Contact: [Round Rock ISD](#)

19. Sourcewell Cooperative

20. Region 2 ESC Purchasing Cooperative, Good buy

Contact: Sherri Fitzpatrick

Website: <https://goodbuy.esc2.net/>

Contract Reference Example: GOODBUY 20-21 6A000

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**PURCHASE REQUISITIONS/
PURCHASE ORDERS
WHAT TO INCLUDE**

Completing a Purchase Requisition

- **Location:** Your department/campus
- **Required:** Date you want/need to receive the goods/services from the vendor
- **Vendor:** enter vendor # or find by clicking on magnifying glass. Not all vendors in eFinance are currently awarded vendors, but since they have prior activity they cannot be deleted. See Google drive [Awarded Vendors and Contracts list for current list of awarded vendors.](#)
- **Add Attachment?:** check this box to remind you to attach the quote and any other backup paperwork when you save your requisition.
- **Freight:** If something is being installed at your campus then enter Inside Delivery. If not, then leave blank.
- **Comments:** Bid Reference/contract #, Three Quotes, Sole Source, etc. (ex. RFP# 19-002) – (not the place to enter instructions or quote numbers - these will be entered in Notes)
- **Buyer:** Person entering the PO requisition (be consistent, so you can search for them later by this field)
- **Attention to:** Department or Campus/Buyer/Recipient
- **Ship To:** 923 Central Receiving. Unless you are having something installed by a vendor, all purchases should be sent to the warehouse
- **Notes:** Quote #/Online Order Number, notes to Vendor, Purchasing, or Business Office Staff. Enter 2 times after to leave a space between notes and line items for ease of reading.
- **Description:** include a clear description of item and part number if available.
- **Unit of Measure:** Enter appropriate UOM. Examples: each(EA), box(BX), dozen(DZ), pack(PK), package(PKG), set, kit, etc.
- **Quantity:** Enter the number of items based on the unit of measure
- **Unit Price:** Price based on the unit price not the total for this item
- **Shipping/Handling Charges:** If known enter these charges as a separate line item.

Check that each line item price and total price matches your quote.

Completing a Purchase Requisition

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- **Required:** Date you want/need to receive the goods/services from the vendor
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- **Comments:** Bid Reference/contract #, Three Quotes, Sole Source, etc. (ex. RFP# 19-002) – (not the place to enter instructions or quote numbers - these will be entered in Notes)
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- **Description:** include a clear description of item and part number if available.
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- **Quantity:** Enter the number of items based on the unit of measure
- **Unit Price:** Price based on the unit price not the total for this item
- **Shipping/Handling Charges:** If known enter these charges as a separate line item.

Check that each line item price and total price matches your quote.

COMMON OMISSIONS FROM PURCHASE REQUISITIONS

- No bid, cooperative or contract referenced in comments field
- Inadequate description of items being purchased. Should include description as well as part number
- “See attached quote” entered instead of each individual item
- Notes: Missing quote number
- No quote(s) attached
- Quote is expired
- No delivery date entered
- No Freight/shipping cost entered (if known)
- Notes missing - telling purchasing to fax or email PO to ???

IMPORTANT: Purchase order number must appear on all invoices, packages, and other correspondence. No C.O.D. shipments will be accepted. All Purchase Orders must be boxed separately.

SEND INVOICE IN DUPLICATE TO:

VENDOR: 14700 LIBERTY PAPER DD OFFICE PRODUCTS PO BOX 58026 LOS ANGELES CA 90058

FAX: 323-582-3434

College Station ISD Business Office 1812 Welsh Avenue College Station, TX 77840-4800 (979) 764-5407 Order/Invoice (979) 764-5408 Delivery

SHIP TO: CENTRAL RECEIVE-COLLEGE STATION ISD RECEIVE PHONE 979-764-5408 9304 ROCK PRAIRIE ROAD COLLEGE STATION, TX 77845 ATTN: PURCHASING/HAIRELL/TAYLOR accountspayable@csisd.org

TERMS: NET 30 DAYS F.O.B DESTINATION CMTS BUYBOARD#528-17 DELIVERY: Dec. 04, 2017

Table with columns: ITEM, ITEM NO., QUANTITY, U.O.M., DESCRIPTION, UNIT PRICE, EXTENSION. Row 1: 01, 240100, 840, CS, TRUCKLOAD MARQUEE 8-1/2X11 INCH 20LB, 96 BRIGHT, 22.0200, 18,496.80. Includes quote text: QUOTE DATED 11/16/17 EMAIL PO AND QUOTE TO KRISTEN@LIBERTYPP.COM

PAGE TOTAL \$ 18,496.80 TOTAL \$ 18,496.80

TAX EXEMPTION #1-74-6000528-7. College Station ISD is exempt from payment of sales, excise, or use taxes under Chapter 20, Title 122A, Revised Civil Statutes of Texas (Articles 20.01 (F) (4)).

APPROVED BY: [Signature]



*Pursuant to Texas Government Code Chapter 2270, Contractor represents and warrants to the District that Contractor does not boycott Israel and will not boycott Israel during the term of this agreement.

MDSE. REC'D BY: DATE REC'D: REQUISITION NO. R1803551 REQUISITION DATE: 12/04/17

Table with columns: ITEM #, ACCOUNT, AMOUNT, PROJECT CODE. Row 1: 01, 1998 1311, 18,496.80

VENDOR

21803551



BETTER PAPER . . . EVEN BETTER PRICES.

November 16, 2017

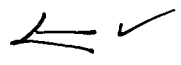
College Station ISD
Jennifer Hairell, CISBS
Purchasing Specialist
9304 Rock Prairie Rd
College Station, TX 77845

Jennifer,

Thank you for the opportunity to provide College Station Independent School District with the following quote:

Alma Plus, 8 1/2 x 11, 20lbs, 98 Bright: 1 Truckload (840 Cases) = \$24.15/case

Marquee, 8 1/2 x 11, 20lbs, 96 Bright: 1 Truckload (840 Cases) = \$22.02/case



This quote is valid for 30 Days. This price includes shipping and delivery. We stand behind our products 100%. Our turnaround time for delivery is 2-5 Days ARO.

Price is valid through Buy Board. Our Buy Board Contract # is 528-17 and through Buy Board you may receive a 1% rebate to add to your savings.

I definitely appreciate the opportunity of earning your business. Please contact me with any questions or requests.

Kind Regards,

Kristen Perez

O: 866.507.2737 x2102
F: 323.582.3434
E: kristen@libertypp.com

Libertypaper

Libertypp.com | 5025 Hampton Street, Los Angeles, CA 90058 | 1.866.50.PAPER | t 323.582.3400 | f 323.582.3434



CONTRACT PAPER GROUP, INC.

1531 Boettler Rd. Ste E
Uniontown, Oh 44685
(P)800-563-5739 ext 229
(F)330-896-6886
www.cpgbid.com

Quotation

16:00

*** Now Offering Office Supplies!

College Station Indep Sch Dist
1812 Welsh Avenue
Use website employee details
Notes 9.26.14.
College Station, TX 77840

Construction Paper
Paper Towels
Envelopes
And many more items.

Dear Mrs. Hairell,

Thank you for considering Contract Paper Group for your upcoming paper needs. As you have requested I have listed our prices for the items noted in your bid. Please review this and if you have any additional questions please call me. **Region 6 Epic pricing included.**

8 1/2 x 11 20lb White Copier Bond

840 cases at \$22.05 per case. 96+ Brightness Import

Price quoted is valid for dock delivery to one location to be unloaded by customer. Quantities in excess of listed amounts are subject to vendor approval.

Thank you for allowing Contract Paper Group, Inc. the opportunity to quote you a price. I will be contacting you shortly to confirm that you received this letter and address any questions or concerns.

Sincerely,

Brian Breitenbach

Brian Breitenbach
Contract Paper Group
P: 800.563.5739
Brianb@cpgbid.com



JP GOULD



Bosworth Papers
10425 Okanella Suite 600 Houston TX 77041
Tel: (713) 460-5060 * Fax: (713) 460-2037
www.bosworthpapers.com

QUOTATION (EXPIRES 12/

OUR ORDER#	Date	Page
207158495	11/15/17 16:16	1

Printed: 11/16/17 - 9:00 AM

S
O COLLEGE STATION INDEP SCH DIST
L 1812 WELSH AVE
D COLLEGE STATION, TX 77840-4851
T USA
O

S
H COLLEGE STATION INDEP SCH DIST
I 9304 ROCK PRAIRIE ROAD
P COLLEGE STATION, TX 77845
T USA
O

PLACED BY: JENNIFER HAIRELL

Phone: (979) 764-5449
Cust PO: quote only

SHIP VIA: Truck

Ship Date	Needed	LDC	Account No.	Class	SP	OE	FOB	Terms
11/15/17	11/16/17		COL764	WH	W57	RM	Origin - FFA	Net 30 Days

Line	Quantity	Size Grade	M-Weight	Unit Price	Amount	Ship Need
1	840 CTN	G19-SPEC11 8-1/2X11 20BS SPECTRUM DP WHITE YOUR#: 1720010	10.00 10.00M	23.44 CTN	19,693.38	11/15/17 11/16/17
		** **		207A		
		** 92 bright domestic thru choice partners				
2	840 CTN	SU1-ONE1120 8-1/2X11 20BS SUZANO ONE	10.00 10.00M	22.08 CTN	18,547.20	11/16/17 11/16/17
		** **		200		
		** import thru choice partners				
		** 96 bright				
		**				*
		** Let us help you with your Office Supply & Furniture needs.				*
		**				*

Remit to: PO Box 847642 Dallas, TX 75284-7642

LINES 2	TOTAL WEIGHT 84,000 LBS				TOTAL (USD) 38,240.58
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WAREHOUSE

CATALOG

WAREHOUSE REQUISITION ENTRY

AND

**HOW TO REQUEST A NEW ITEM TO BE
STOCKED IN THE WAREHOUSE**

WAREHOUSE CATALOG

Stock Number	Description	Unit of Measure	Cost Per Unit	PLEASE NOTE: Prices will vary as stock is replenished.	
112000	Correction Tape	Each	\$0.99		
115000	Binders 3 Ring 1" Black	Each	\$1.03	These three are basic binders. No outside pockets.	
115001	Binders 3 Ring 2" Black	Each	\$1.30		
115004	Binders 3 Ring 3" Black	Each	\$3.05		
115110	Binders 3 Ring 1" White w/Clear View Pockets	Each	\$1.36		with outside pockets
115111	Binders 3 Ring 1" Blue w/Clear View Pockets	Each	\$1.10		with outside pockets
115112	Binders 3 Ring 1" Black w/Clear View Pockets	Each	\$1.36		with outside pockets
115114	Binders 3 Ring 2" White w/Clear View Pockets	Each	\$1.53		with outside pockets
115115	Binders 3 Ring 2" Blue w/Clear View Pockets	Each	\$1.46		with outside pockets
115116	Binders 3 Ring 2" Black w/Clear View Pockets	Each	\$2.12		with outside pockets
115118	Binders 3 Ring 3" White w/Clear View Pockets	Each	\$2.75	with outside pockets	
116100	Flash Drive USB 4GB	Each	\$5.41		
117000	Tape Dispenser (plastic 1" core)	Each	\$0.79	Heavy-weight base features a	
120200	Envelopes Kraft 6x9 w/Gummed Flap Clasp	100/Box	\$7.05		
120250	Envelopes Kraft 9x12 w/Gummed Flap Clasp	100/Box	\$8.00		
120260	Inter-Office Envelopes 13"x10"	100/Box	\$13.87	New available now	
120700	Envelopes White Plain #10	500/Box	\$8.12		
121100	Whiteboard Eraser 5"	Each	\$2.01		
121300	Whiteboard Cleaner Spray bottle Expo	each	\$2.98		
121305	Duster, Gas 10 oz. Compressed Air Cleaner	each	\$2.97		
123000	Binder Clip - Mini 9/16"	12/Box	\$0.16	One picture to show different sizes. Sizes sold separately. -->	
123100	Binder Clip - Small 3/4"	12/Box	\$0.17		
123150	Binder Clip - Medium 1-1/4"	12/Box	\$0.42		
123200	Binder Clip - Large 2"	12/Box	\$0.92		
123300	Binder Clips - Assorted Sizes & Colors	30/Box	\$2.54		
128100	File Storage Boxes, 15x12x10 w/lids pack of 12	12/pack	\$14.98		
130000	File Pockets Letter Flat 9-1/2" x 11-3/4"	100/Box	\$11.11		
130200	File Pockets Legal 9-1/2"x 11-3/4"	100/Box	\$15.13		
130690	Hanging Folder Letter size Green	25/Box	\$4.36	yellow, orange, red, blue & green	
130693	Hanging Folder Letter Size Asstd Colors	25/Box	\$5.84		
130694	Hanging Folder Legal Size Asstd Colors	25/Box	\$10.06		
130695	Hanging Folder Legal Size Green	25/Box	\$6.35		
130696	Hanging Folder Letter Size Purple	25/Box	\$10.39		
130697	Hanging Folder Legal Size Purple	25/Box	\$5.62		
130698	Hanging Folder Letter Size Red	25/Box	\$5.89		
130700	Folder Letter Manila Size 1/3 cut 11 point	100/Box	\$4.49		
130800	Folder Legal Manila Size 1/3 cut 11 point	100/Box	\$5.38		
130810	Folders Assorted Colors Letter Size 1/3 Cut	100/Box	\$7.13		
130820	Folders Blue Letter Size 1/3 Cut	100/Box	\$8.52		
130830	Folders Yellow Letter Size 1/3 Cut	100/Box	\$7.75		
130840	Folders Green Letter Size 1/3 Cut	100/Box	\$8.71		
130850	Folders Lavender Letter Size 1/3 Cut	100/Box	\$9.75		
130870	Folders Pink Letter Size 1/3 Cut	100/Box	\$5.79		
130880	Folders Red Letter Size 1/3 Cut	100/Box	\$9.15		
130900	Folders Pocket with Fasteners 3 Hole Asstd Colors	25/Box	\$4.63		
130901	Folder Pocket Asstd Colors No Fasteners	25/Box	\$2.65	NO Brads/Fastners	
131100	Glue 4 oz Bottle Elmer's School Glue	Each	\$0.58		
131105	Glue Sticks, 4" Clear, 50/pk for GLUE GUNS	PK	\$5.17		
131800	Index Cards 3x5 Ruled	100/Pkg	\$0.30		
131900	Index Cards 4x6 Ruled	100/Pkg	\$0.56		
133290	Labels Barcodes for Textbooks (Avery6578)	750/Pkg	\$25.99		
133295	Labels, Hall Pass for Visitors, 4" x 2-5/8" 300 labels/badges per roll	4Rolls/cs	\$31.00		
134130	Laminating Film 500'x 25"	ONE Roll	\$15.60		
134140	Thermal Laminating Pouches 9x11	100/pk	\$9.77		
135801	Composition Notebook Black marble cover, 7.5x9 3/4, 100 sheets=200pages, wide ruled	each	\$0.76		
142000	Post-It Notes 1-1/2"x 2" Yellow	12/Pkg	\$1.12		
142050	Post-It Notes 3"x 3" Yellow	12/Pkg	\$1.98		
142055	Post It Notes 3"x3" Yellow Lined POP UP Refill	6/pkg	\$5.47		
142060	Post-It Notes 3"x 3" Asstd Bright Full Adhesive	12/Pkg	\$6.37	Blue, light green,	
142065	Post-It-Notes 3"x3" Asstd Bright/Neon Colors POP UP	12/Pkg	\$11.07	and light green	
142070	Post-It Notes 3"x 3" Asstd Ultra Colors	5/Pkg	\$5.84	Jaipur collection: light green,	
142075	Post-It-Notes 3"x3" Asstd Ultra Colors POP UP	12/Pkg	\$11.66	Jaipur collection: blue, light	
142091	Dispenser POP UP Post-It-Notes 3x3 Black w/Clear top	Each	\$7.57		
146100	Paper Clips Jumbo	100/Box	\$0.41		
146200	Paper Clips Standard	100/Box	\$0.21		
149210	Pencils No.2	Dozen	\$0.74		
149212	Pencils, Mechanical Xtra-Strong Assorted Barrel Colors, 24/pk	24/Pack	\$4.81		
149220	Erasers, Pencil, Medium Pink Pearl	24/Pkg	\$4.94		
152350	Highlighter Yellow Chisel Tip, pen style	Dozen	\$1.63		
152352	Highlighter Green Chisel Tip, pen style	Dozen	\$1.87		
152354	Highlighter Pink Chisel Tip, pen style	Dozen	\$1.87		
152470	Pens Rolling Ball Retractable Gel Fine PT Black	Dozen	\$10.50		
152471	Pens Rolling Ball Retractable Gel Fine PT Blue	Dozen	\$10.40		
152472	Pens Rolling Ball Retractable Gel Fine Pt Red	Dozen	\$10.20		
152480	Pens Rolling Ball UniBall Gel-Grip Med. Pt Black	Dozen	\$8.95		
152482	Pens Rolling Ball UniBall Gel-Grip Med. Pt Blue	Dozen	\$9.95		
152484	Pens Rolling Ball UniBall Gel-Grip Med. Pt Red	Dozen	\$10.03		
152500	Pens Stick Ballpoint Fine Black	Dozen	\$0.88		

WAREHOUSE CATALOG

Stock Number	Description	Unit of Measure	Cost Per Unit	PLEASE NOTE: Prices will vary as stock is replenished.
152600	Pens Stick Ballpoint Fine Blue	Dozen	\$0.88	
152700	Pens Stick Ballpoint Fine Red	Dozen	\$0.89	
152750	Pens Stick Ballpoint Medium Black	Dozen	\$0.71	
152760	Pens Stick Ballpoint Medium Blue	Dozen	\$0.87	
152780	Pens Stick Ballpoint Medium Red	Dozen	\$0.89	
153000	Dry Erase Markers EXPO Fine Tip 4 Color Set	Set	\$3.75	
153010	Dry Erase Markers EXPO Chisel Tip Black	Dozen	\$6.45	
153012	Dry Erase Markers EXPO Chisel Tip 4 Color Set	Set	\$4.61	
153021	Permanent Marker Jumbo Chisel Tip Black	Each	\$2.56	
153026	Permanent Marker Regular Chisel Tip Black	Dozen	\$3.25	
153027	Permanent Marker Chisel Tip Red	Dozen	\$6.82	
153028	Permanent Marker Chisel Tip Green	Dozen	\$7.65	
153029	Permanent Marker Fine Tip Black SHARPIE	Dozen	\$5.53	FYI: 3 dozen(36) = \$14.97
153030	Permanent Marker Fine Asst. Color SHARPIE	8/Set	\$6.30	
158400	Scissors Straight 8" Plastic Handle Adult	Each	\$3.29	
158600	Scissors Straight 8" Metal Adult	Each	\$0.67	
158800	Sheet Protector Non-Glare	200/Box	\$3.87	
161100	Staple Removers	Each	\$0.68	
161200	Stapler Black Swingline 74701	Each	\$7.69	classic manual 20 sheet
162200	Staples Standard Chisel	5000/Box	\$0.57	
171600	Tape Magic/Transparent 3/4" x 1296' (1" core) Refills for use with desktop dispenser#117000	Dozen	\$17.40	Brand: SCOTCH
172140	Tape Shipping/Mailing 2"x 50' CLEAR not brown	Roll	\$0.88	Made by 3M - Clear shipping
172145	Tape, Masking 1" x 60' Tan	Roll	\$3.19	made by 3M
172150	Tape - Magic 3/4" x 2592" (3" core NOT FOR use with desk dispenser!)	Box	\$46.68	Not for use with desk
173300	Transparency Film Clear for Copier	Each	\$6.76	
173350	Transparency Film Black on Clear for Overhead	Box	\$18.95	
210700	Brown Kraft Wrap Paper 36"	Roll	\$34.15	
220400	IBM Computer Paper Blue Bar 14-7/8"x11"	Ctn	\$35.16	
220650	Index Paper 8-1/2x11 White 110lb	Ream	\$5.54	INDEX PAPER = CARDSTOCK
220700	Index Paper 8-1/2x11 Green 110lb	Ream	\$5.85	
220750	Index Paper 8-1/2x11 Canary 110lb	Ream	\$5.90	
220800	Index Paper 8-1/2x11 Blue 110lb	Ream	\$5.88	
220850	Index Paper 8-1/2x11 CHERRY Pink 110lb	Ream	\$5.35	
220950	Index Paper 8-1/2x11 Buff 110lb	Ream	\$5.77	
220965	Laser Print Paper 8-1/2x11 24lb Blue	Ream	\$3.87	
240100	Multipurpose Paper 8-1/2x11 White	Case	\$27.70	MultiPurpose Paper = Copy Paper
240200	Multipurpose Paper 8-1/2x11 Pink	Ream	\$3.92	
240300	Multipurpose Paper 8-1/2x11 Green	Ream	\$4.16	
240400	Multipurpose Paper 8-1/2x11 Goldenrod	Ream	\$3.76	
240500	Multipurpose Paper 8-1/2x11 Canary	Ream	\$3.98	
240600	Multipurpose Paper 8-1/2x11 Buff	Ream	\$3.97	
240700	Multipurpose Paper 8-1/2x11 Blue	Ream	\$3.95	
240750	Paper, Multi Purpose, 8.5x11, Light Purple	Ream	\$3.96	
240800	Multipurpose Paper 8-1/2x11 Asstd AstroBright	Ream/500	\$10.47	
245100	Multipurpose Paper 8-1/2x14 White	Ream	\$3.95	
245250	Multipurpose Paper 11x17 White bond 20lb	Ream	\$6.71	
245260	Paper, 3-hole Punched 8-1/2x11	Ream	\$2.88	
249000	Poster Board 6-Ply White 22"x28"	100/Ctn	\$24.28	
249010	Poster Board 4-Ply White 22" x 28"	100/Ctn	\$25.99	
265000	Bulletin Board Paper 36"x1000' White	Roll	\$28.53	
265050	Bulletin Board Paper 36"x1000' Scarlet	Roll	\$32.30	
265060	Bulletin Board Paper 36"x1000' Dark Blue	Roll	\$30.05	
265070	Bulletin Board Paper 36"x1000' Yellow	Roll	\$38.89	
265100	Bulletin Board Paper 36"x1000' Black	Roll	\$33.87	
265200	Bulletin Board Paper 36"x1000' Emerald Green	Roll	\$28.06	
265400	Bulletin Board Paper 36"x1000' Orange	Roll	\$47.34	
302000	Batteries, size AAAA, 6/pkg	Pkg	\$5.99	
304000	Batteries, Industrial, Size AAA, 4/pkg	Pkg	\$0.80	
304100	Batteries, for Flexmike PA & Remote AAA Rechargeable battery pack (800 mAH AAx2) 2.4v NiMH	pk	\$12.00	
305000	Batteries, Industrial, Size AA, 4/pkg	Pkg	\$0.82	
305100	Batteries, for Redmike PA, AA NiMH Rechargeable (2700mA)	Each	\$7.00	
306000	Batteries, Industrial, Size C	Each	\$0.45	
307000	Batteries, Industrial, Size D	Each	\$0.61	
308000	Batteries, Industrial, Size 9V, Alkaline	Each	\$0.90	
308050	Batteries, Lithium AA, 4/pkg	Pkg	\$7.96	
309000	Bleach	Case	\$12.47	
320400	Cotton Knit Wipes(Rags)	Bag	\$3.85	
320405	Wipes, Disinfecting Clorox/Boardwalk/Perk (Brand and Scent will vary depending on stock)	75/Tub	\$4.95	back ordered by manufacture will stock as soon as available
320410	Sanitizer, Hand 2 liter pump bottle	bottle	\$23.33	19 available as of 9.9.20
320415	Sanitizer, hand 12 oz bottle	bottle	\$5.87	Zero available - looking for
320419	Sanitizer, Hand Gallon Bottle	Bottle	\$23.42	343 available as of 9.9.20
320450	Sanitizer, Hand 16.9oz bottle	bottle	\$8.11	3,072 bottles available as of
320420	Disinfectant Spray, 19oz can	can	\$9.70	back ordered by manufacture will stock as soon as available

WAREHOUSE CATALOG

Stock Number	Description	Unit of Measure	Cost Per Unit	PLEASE NOTE: Prices will vary as stock is replenished.
320421	Disinfectant Spray, 14oz aerosol can	can	\$6.99	37 available as of 9.9.20
320422	Disinfectant Spray, 17oz aerosol can Lemon Scent	can	\$8.66	1013 available as of 9.9.20
320423	Disinfectant Spray, 12.5oz can	can	\$6.65	204 on order: eta unknown
320424	Disinfectant Spray 32 oz bottle Simple Green brand	bottle	\$3.48	305 available as of 9.9.20
320425	Screen Wipes	100/bx	\$12.55	
320435	Wipes, Disinfecting 160/tub Super Sani-Cloth Germic	tub	\$10.28	None available
320436	Wipes Sanitizing, 125 wipes/Can Hydrogen Peroxide	125/cn	\$11.33	279 available as of 9.9.20
320440	Disinfectant Wipes, 75% ethanol 40/pk	pk	\$5.81	122 available as of 9.9.20
320441	Wipes Disinfectant 75% Alcohol 80/pk	80/pk	\$3.59	3700 available as of 9.9.20
320445	Wipes, Disinfecting 35/Tub	tub	\$3.51	204 on order eta: unknown
320449	Wipes, Disinfecting 50/pk	pk	\$4.92	134 available as of 9.9.20
330150	Laundry Detergent	Bucket	\$16.00	
330160	Laundry Detergent for High Efficiency machines	Bucket	\$22.97	
351002	Gloves, Latex Powder Free, Small, 100 pr/bx	Box	\$4.27	91 in stock as of 8.26.20
351003	Gloves, Latex Powder Free, Medium, 100 pr/bx	Box	\$4.26	never ending search
351005	Gloves, Latex Powder Free, Large, 100 pr/bx	Box	\$4.27	36 in stock as of 8.26.20
351007	Gloves, Latex Powder Free, X-Large, 100 pr/bx	Box	\$4.25	177 in stock as of 8.26.20
351008	Gloves, Medium BLUE Nitrile Disposable (Latex Free) Exam Grade	Box	\$4.10	Never ending search
351010	Gloves, Large BLUE Nitrile Disposable (Latex FREE) Exam Grade	Box	\$4.30	57 in stock as of 9.9.20
351075	Gloves, Small Blue Nitrile Disposable (Latex Powder Free) Exam Grade	Box	\$4.31	215 in stock as of 9.9.20
351015	Gloves, Vinyl, Small 100/bx	Box	\$8.75	393 in stock as of 9.9.20
351020	Gloves, Vinyl, Medium Exam Grade 100/bx	Box	\$8.75	215 in stock as of 9.9.20
351025	Gloves, Vinyl, Large Exam Grade 100/bx	Box	\$8.75	393 in stock as of 9.9.20
354000	Gloves, Lined, Playtex, Small, 12 pr/pkg	Pkg	\$5.92	
354100	Gloves, Lined, Playtex, Medium, 12 pr/pkg	Pkg	\$5.57	
354200	Gloves, Lined, Playtex, Large, 12 pr/pkg	Pkg	\$5.57	
355280	Light Bulbs, T-8 F32SP35, 25/case	Case	\$42.05	fluorescent
355281	Light Bulbs, T5 F54 Watt Fluorescent Lamps 25/cs	Case	\$51.75	
355284	light bulbs, T-5, 28W, F28T5/841, 40/case	case	\$159.60	NEW
355400	Light Bulbs, 26W, Compact Fluorescent 10/case	Case	\$24.31	
355550	Light Bulbs, 67W, Incandescent, 2/pkg	Pkg	\$0.53	
355600	Light Bulbs, 100W, Std Base, 2/pkg	Pkg	\$0.45	
355650	Light Bulbs, 32W 2Pin Compact Fluorescent 12/cs	Case	\$44.80	
355655	light bulbs, CFL 42Watt-841/4pin, 10/case	case	\$44.80	
359100	Mops, Wet, Mop Head	Each	\$4.64	
359200	Mop Handles - Wet	Each	\$5.00	
367250	Paper Towels White Kitchen Perforated	roll		NEW
378000	Tissues, Facial 2-ply, white, 100/box Kleenex	Box	\$1.04	
379000	Towels, Bath, 20 x 40, 12/pkg	Pkg	\$10.41	
379050	Towels, Bath, 34 x 72, 12/pkg	Pkg	\$39.75	
381300	Trash Cans, 44 gallon W/O Lid	Each	\$24.00	
381400	Cart Dolly for 44 Gal Trash can	Each	\$17.89	
381425	Trash Can Lids 44 Gal	Each	\$11.79	
381450	Mop Bucket w/casters w/downward press wringer	Each	\$42.25	
381525	Trash Can Liners, 33 x 40, H/D, 10 rolls/case	Case	\$17.32	
381530	wastebstk liner/bag clear 24x32 low-density 500/box	500/bx	\$28.49	
381565	Trash Can Liners, 43 x 48, 8 rolls/case	Case	\$21.64	
385800	Wastebaskets, 15" Rectangular Grey	Each	\$3.21	
385850	Wastebaskets, 20" Rectangular Grey	Each	\$5.91	
390100	Hairnet, Bouttant cap, White 24", 500/case	500/Case	\$12.00	
390210	Disposable Face Dust Mask 3 ply 50/bx	50/bx	\$32.12	927 available as of 8.11.20
390215	Disposable Face Dust Mask 3 ply 20/box	20/bx	\$28.00	15 available as of 8.11.20
390225	Face Shield, Protective Isolation Mask 12/pk	DOZEN	\$0.00	No charge 20 dozen available
390210F	Disposable Face Mask, Adult	50/bx	\$0.00	1004 as of 9.9.20
390220F	Disposable Kids Face Mask	50/bx	\$0.00	27 as of 9.9.20
390225F	Face Shield	Each	\$0.00	2000 as of 9.9.20
390230F	Reusable Face Mask, White 5pk	5/pk	\$0.00	3418 as of 9.9.20
390235F	Tri-fold Desk Barrier/Shield 23x24x16	Each	\$0.00	185 as of 9.9.20
460500	File Cabinet, 4-Drw, Legal, W/Lock	Each	\$255.82	
460600	File Cabinet, 4-Drw, Letter, W/Lock	Each	\$276.05	
460650	File Cabinet, 4-Drw, Letter Black	Each	\$228.98	
500700	Glue Stick .75oz Elmer's	Dozen	\$6.28	
501400	Construction Paper Assorted 9x12"	Pkg/50	\$1.36	
600200	Feminine Pads 96/pkg - Always Ultra Thin w/Wings	Pkg/96	\$18.00	
600201	Bandages, Coverlet Fabric 1" x 3" 1500/case	cs	\$50.53	
700285	Gloves Medium Leather	Pair	\$4.62	
700290	Gloves, Drivers, Leather, Large	Pair	\$3.62	
700300	Gloves, X-Large Leather	Pair	\$3.99	
700305	Gloves, Drivers, Leather, Small	Pair	\$4.37	
700378	Surge Protector 6 Outlet	Each	\$8.49	
700379	Surge Protector 7 Outlet 7' Cord	Each	\$16.09	
700385	Cups, 3 oz water paper 100/Tube	Tube	\$3.70	
700390	Paper Grocery Sack/Bag, 1/6 BBL 57# 12x7x17	500/bale	\$44.05	
700391	Paper Grocery Sack/Bag, 1/6 BBL 75# 12x7x17	400/bale	\$39.52	
700392	Paper Grocery Sack/Bag, 1/6 BBL 57# 12x7x17	400/bale	\$44.75	
700395	Bags, Freezer Resealable, Quart 38/box	Box	\$6.59	
700398	Bags, Storage Resealable, Gallon, 19/box	Box	\$3.95	
80000	Utensil Pack Flatware, Heavy Duty, White K,F,S,Napkin 250/cs	Case	\$29.14	

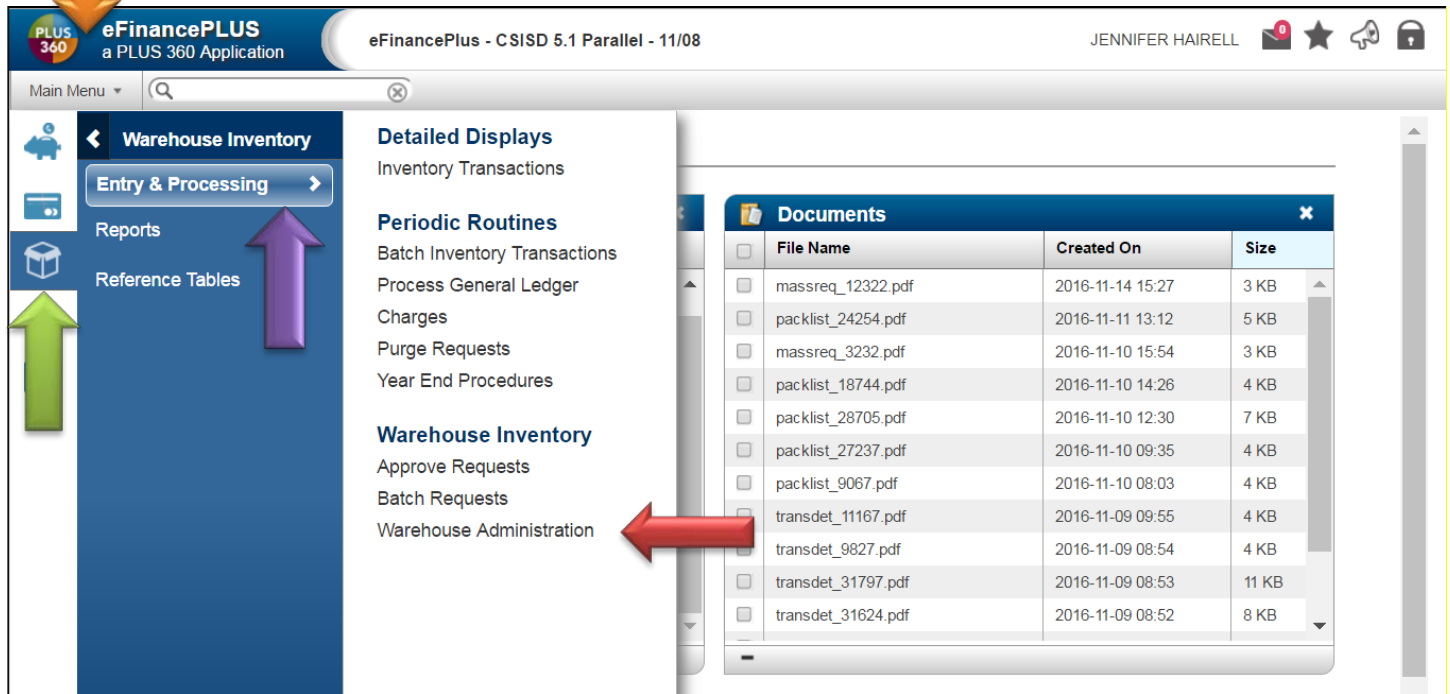
WAREHOUSE CATALOG

Stock Number	Description	Unit of Measure	Cost Per Unit	PLEASE NOTE: Prices will vary as stock is replenished.
800005	Forks, Heavyweight, white, 1000/ctn	Carton	\$14.06	
800008	Knives, Heavyweight, white, 1000/ctn	Carton	\$14.66	
800009	Spoons, Heavyweight, white, 1000/ctn	Carton	\$14.00	
80010	Plates, paper, Heavyweight, white, 8.5", 500/pk	Pack	\$59.32	
800100	Napkins, Luncheon, 6-1/4"x5-2/4", white, 400/pk	Pack	\$4.19	
900001F	Hand Washing Sign Elementary 8x11	Each	\$0.00	150 as of 9.9.20
900005F	Hand Washing Sign Secondary Campus 8x11	Each	\$0.00	150 as of 9.9.20
900010F	Please Wait Here Sign 5x7	Each	\$0.00	135 as of 9.9.20
900015F	Green Gaffer Tape for Distance Marking 165'/Roll	Roll	\$0.00	8 as of 9.9.20
900020F	Infrared Thermometer with Battery	Each	\$0.00	60 as of 9.9.20

Entering a Warehouse Requisition

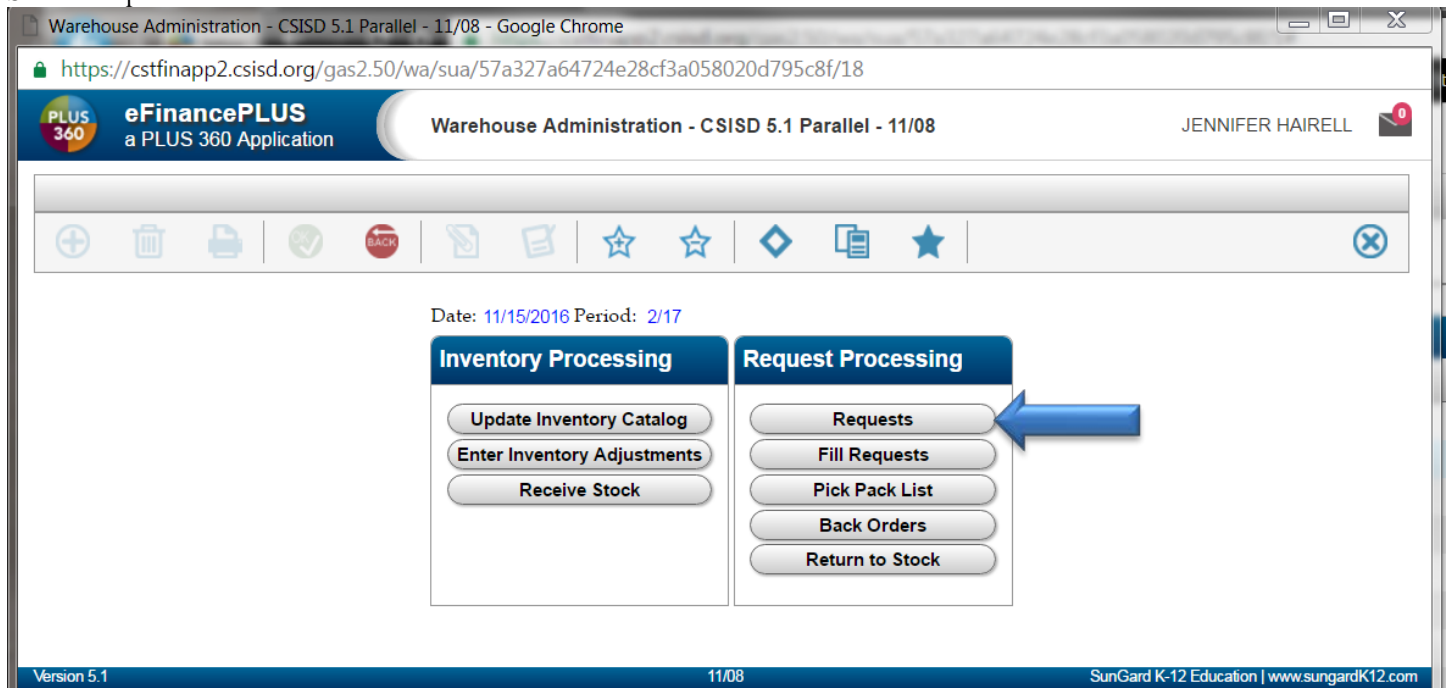
Log into eFinance Plus 5.1

Main Menu – **WAREHOUSE INVENTORY** – **ENTRY & PROCESSING** -> Select **Warehouse Administration**
(See below)



A new window will open. (If it does not open, check to make sure that you have set your Pop-Up blocker to allow efinance to send you Pop-Ups.)

Select Requests



Select New Document (circle with a plus sign)

Update Request - CSISD 5.1 Parallel - 11/08

Date: 11/15/2016 Period: 2/17

Search Criteria

Request Number
Request Year
Warehouse
Date Requested
Requested By
Date Required
Ship Code
Comments

Request N...	Year	Warehouse	Date Reques...	By	Date Required	Ship Code	C

Version 5.1 11/08 SunGard K-12 Education | www.sungardK12.com

Write down the request number now.

From drop down menu select 923-Warehouse

Add New Request - CSISD 5.1 Parallel - 11/08

Date: 11/15/2016 Period: 2/17

Request Number * 115538 Continuous

Request Year 2017

Warehouse * 923 - WAREHOUSE

Date Requested 925 - FACILITIES - FUEL TANKS

Requested By

Date Required

Ship Code *

Comments

Item	Stock Number	BUDGET CODE	Account	PROJECT...	Account	Quantity	Price	Status	Recr

Date Requested will automatically show today's date.

Requested By: enter name

Date Required: date item is required by

Ship Code: Drop down menu and select campus/department or type in your number to select

Add New Request - CSISD 5.1 Parallel - 11/08

https://cstfinapp2.csisd.org/gas2.50/wa/sua/57a327a64724e28cf3a058020d795c8f/21

PLUS 360 eFinancePLUS a PLUS 360 Application Add New Request - CSISD 5.1 Parallel - 11/08 JET

Date: 11/15/2016 Period: 2/17

Request Number * 115538 Continuous

Request Year 2017

Warehouse * 923 - WAREHOUSE

Date Requested 11/15/2016

Requested By JHAIRELL

Date Required 11/15/2016

Ship Code *

Comments

Item	Stock	PROJECT...	Account	Quantity	Price
	001CS - HIGH SCHOOL CUSTODIAL				
	001FS - HIGH SCHOOL CAFETERIA				
	002 - COLLEGE VIEW HIGH SCHOOL				
	002-2 - COLLEGE VIEW HIGH SCHOOL				
	003 - COLLEGE STATION HIGH SCHOOL				
	041 - COLLEGE STATION MIDDLE SCHOOL				
	041CS - CS MIDDLE SCHOOL-CUSTODIAL				
	041FS - CS MIDDLE SCHOOL CAFETERIA				
	042 - A&M CONSOLIDATED MIDDLE SCHOOL				
	042CS - A&M CONSOL MIDDLE SCHOOL CUSTODIAL				
	096 - OLD TIGER FIELD				

Comments: Enter notes to WH Staff or for your records. Tab to Stock Number

Enter the Stock Number (Catalog number) – This will automatically fill the account field and unit price. (See below.)

(Tip: You can search the stock items by clicking on the magnifying glass in the Stock Number area. click find to see all stock items or enter all or part of item name.)

https://cstfinapp2.csisd.org/gas2.50/wa/sua/57a327a64724e28cf3a058020d795c8f/23

PLUS 360 eFinancePLUS a PLUS 360 Application Add New Request - CSISD 5.1 Parallel - 11/08

Date: 11/15/2016 Period: 2/17

Request Number * 115539 Continuous

Request Year 2017

Warehouse * 923 - WAREHOUSE

Date Requested 11/15/2016

Requested By JHAIRELL

Date Required

Ship Code * NEW LOCATI**** CENTRAL RECEIVING NEW LOCATI**** CENTRAL RECEIVING

Comments EXAMPLE ORDER DO NOT FILL

Item	Stock Number	BUDGET CODE	Quantity
1			0.0
2			0.0
3			0.0

Using Search to locate stock number: Click on the magnifying glass in the stock number box. When page opens enter keyword using asterisks before and after the word. Click Find. You can also leave search areas blank and eFinance will bring up all items in the warehouse. See example below:

Search

Warehouse

Stock Number

Description

Available

Back Ordered

Results:

Search

Warehouse

Stock Number

Description

Available

Back Ordered

On Order

Warehouse	Stock Number	Description	Measure	Available	Back Ordered	On order
923	117000	DISPENSER PLASTIC TAPE 1" CORE	EACH	185.0000	0.0000	0.0000
923	142091	DISPENSER POP UP POST-IT-NOTE 3 X 3 BLACK	EACH	48.0000	0.0000	0.0000
923	152350	PENS HIGHLIGHTER YELLOW 12/BX	BOX/12	47.0000	0.0000	0.0000
923	152352	PENS HIGHLIGHTER GREEN	BOX/12	90.0000	0.0000	0.0000
923	152354	PENS HIGHLIGHTER PINK	BOX/12	81.0000	0.0000	0.0000
923	152470	PENS ROLLING BALL RETRACTABLE GEL FINE PT BLACK	DOZEN	98.0000	0.0000	0.0000
923	152471	PENS ROLLING BALL RETRACTABLE GEL FINE PT BLUE	DOZEN	100.0000	0.0000	0.0000
923	152472	PENS ROLLING BALL RETRACTABLE GEL FINE PT. RED	DOZEN	100.0000	0.0000	0.0000
923	152480	PENS ROLLING BALL UNI BALL GEL GRIP MED. PT. BLACK	DOZEN	86.0000	0.0000	0.0000
923	152482	PENS ROLLING BALL UNI BALL GEL GRIP MED PT. BLUE	DOZEN	96.0000	0.0000	0.0000
923	152484	PENS ROLLING BALL UNIBALL GEL GRIP MED. PT. RED	DOZEN	96.0000	0.0000	0.0000
923	152500	PENS BALLPOINT ROLLER BALL FINE BLACK	BOX/12	180.0000	0.0000	0.0000
923	152600	PENS BALLPOINT ROLLER BALL FINE BLUE	BOX/12	117.0000	0.0000	0.0000

Once you find the item you want double click the item and the stock number will be entered into your request. If you do not find what you want use the back button to get back to your request. If you X out of this window you will close your request. Enter Budget Code. Change Account Number if necessary. (See below)

Add New Request - CSISD 5.1 Parallel - 11/08 - Google Chrome

https://cstfinapp2.csisd.org/gas2.50/wa/sua/57a327a64724e28cf3a058020d795c8f/23

eFinancePLUS
a PLUS 360 Application

Add New Request - CSISD 5.1 Parallel - 11/08

JENNIFER HAIRELL

Date: 11/15/2016 Period: 2/17

Request Number *

Request Year

Warehouse *

Date Requested

Request

Date

Ship Code

Comments

Enter Budget Code

As soon as you enter a stock number efinance will enter the account number. You can change it if you need to.

Item	Stock Number	BUDGET CODE	Account	PROJECT...	Account	Quantity	Price	Status
1	152470	<input type="text"/>	6399			0.0000	10.1800	O - Open
2						0.0000	0.0000	O - Open

Tab past SUB PROJECT and Account to Quantity. Enter Quantity.

Hit Tab to go to the next line. If you hit Enter you will submit your request.
 (You can still add more items if this happens see last page of these instructions.)

Scroll to the right and you will see the unit price and a brief description of each item including unit of measure (i.e. case, ream, 4/pk).

Date: 11/15/2016 Period: 2/17

Request Number * 115539 Continuous

Request Year 2017

Warehouse * 923 - WAREHOUSE

Date Requested 11/15/2016

Requested By JHAIRELL

Date Required 11/15/2016

Ship Code * 923 - NEW LOCATI**** CENTRAL RECEIVING NEW LOCATI**** CENTRAL RECEIVING

Comments EXAMPLE ORDER DO NOT FILL

r	BUDGET CODE	Account	PROJECT...	Account	Quantity	Price	Status	Receive Date	Back Order	Total Amount	Description
	1997510092399063	6399			2.0000	10.1800	O - Open		0.0000	20.36	PENS ROLLING BALL RETRACTABLE GEL FINE PT B
					0.0000	0.0000	O - Open		0.0000	0.00	
					0.0000	0.0000	O - Open		0.0000	0.00	

If you are done: Make sure you have written down your request number and Click OK. This will submit your request.

You must click OK to submit the request. Once you hit OK a red flag will pop up next to the Warehouse line stating **Request added** When you see the screen below the request number has rolled over to a new one and you are ready to enter another request or exit.

https://cstfinapp2.csisd.org/gas2.50/wa/sua/57a327a64724e28cf3a058020d795c8f/23

PLUS 360 eFinancePLUS a PLUS 360 Application Add New Request - CSISD 5.1 Parallel - 11/08

Date: 11/15/2016 Period: 2/17

Request Number * 115540 Continuous

Request Year 2017

Warehouse * 923 - WAREHOUSE **Request added**

Date Requested 11/15/2016

Requested By JHAIRELL

Date Required

Ship Code * 923 - NEW LOCATI**** CENTRAL RECEIVING NEW LOCATI**** CENTRAL

Comments EXAMPLE ORDER DO NOT FILL

Item	Stock Number	BUDGET CODE	Account	PROJECT...	Account	Qu
1	152470	1997510092399063	6399			
2						

And that is all there is to it. If you get stuck or have a question contact Jennifer Hairell x5449 or Jarius San Angelo x5541. We will be happy to help you out.

TIP: Did you forget something or want to change something or want to make sure your request went through – do the following:

From Warehouse Administration page click on Requests.

You can enter any of the following: the request number, date or the ship code or you can leave them all blank. **Hit find.**

For this example I entered the date requested and our ship code.

https://cstfinapp2.csisd.org/gas2.50/wa/sua/57a327a64724e28cf3a058020d795c8f/23

eFinancePLUS
a PLUS 360 Application

Update Request - CSISD 5.1 Parallel - 11/08

JENNIFER HAIR

Add Item Exception Fill Delete Item Print Requests Unapprove

Date: 11/15/2016 Period: 2/17

Search Criteria

Request Number
Request Year
Warehouse
Date Requested: 11/15/16
Requested By
Date Required
Ship Code: 923 - NEW LOCATI**** CENTRAL RECEIVING
Comments

Find Advanced

Request N...	Year	Warehouse	Date Reques...	By	Date Required	Ship Code	Comments
115539	2017	WAREHOUSE	11/15/2016	JHAIRELL	11/15/2016	923	EXAMPLE ORDER DO NOT FILL

eFinance will pull up all the requests related to the information you gave.

If you want to edit the request or check what was ordered double click on the request. Click OK and you will be able to see the items you ordered.

If you want to add an item(s) to the order: Click the order only one time and click on Add Item at the top of the page. See above.

If you see a box like the picture below that means we have already processed your order and it cannot be edited not even by us. eFinance will not let you see your order at this point. If you have questions, please contact Jarius SanAngelo or Jennifer Hairell for help with your order.

https://cstfinapp2.csisd.org/gas2.50/wa/sua/57a327a64724e28cf3a058020d795c8f/26

eFinancePLUS
a PLUS 360 Application

Change Request - CSISD 5.1 Parallel - 11/08

JENNIFER HAIRELL

Date: 11/15/2016 Period: 2/17

Request Number * 115539 Continuous
Request Year 2017
Warehouse * 923 - WAREHOUSE
Date Requested 11/15/2016
Requested By JHAIRELL
Date Required 11/15/2016
Ship Code * 923 - NEW LOCATI**** CENTRAL RECEIVING
Comments EXAMPLE ORDER DO NOT FILL

Item	Stock Number	BUDGET CODE	Account	Price	Status	Receive Date	Back Order
------	--------------	-------------	---------	-------	--------	--------------	------------

Warning
There are no unfilled or unapproved line items that may be changed.
OK

Entering a Warehouse Requisition

Log into eFinance Plus 5.1

Main Menu – **WAREHOUSE INVENTORY** – **ENTRY & PROCESSING** -> Select **Warehouse Administration**

A new window will open. (If it does not open, check to make sure that you have set your Pop-Up blocker to allow efinance to send you Pop-Ups.)

Select Requests

Select New Document (circle with a plus sign)

Write down the request number now.

From drop down menu select 923-Warehouse

Date Requested will automatically show today's date.

Requested By: enter name

Date Required: date item is required by

Ship Code: Drop down menu and select campus/department or type in your number to select

Comments: Enter notes to WH Staff or for your records. Tab to Stock Number

Enter the Stock Number (Catalog number) – This will automatically fill the account field and unit price.

(Tip: You can search the stock items by clicking on the magnifying glass in the Stock Number area. click find to see all stock items or enter all or part of item name.)

Using Search to locate stock number: Click on the magnifying glass in the stock number box. When page opens enter keyword using asterisks before and after the word. Click Find. You can also leave search areas blank and eFinance will bring up all items in the warehouse.

Once you find the item you want double click the item and the stock number will be entered into your request.

If you do not find what you want use the back button to get back to your request.

If you X out of this window you will close your request.

Enter Budget Code. Change Account Number if necessary.

Tab past SUB PROJECT and Account to Quantity. Enter Quantity.

Hit Tab to go to the next line. **If you hit Enter you will submit your request.**

(You can still add more items if this happens see Tips & Tricks Section.)

Scroll to the right and you will see the unit price and a brief description of each item including unit of measure (i.e. case, ream, 4/pk).

If you are done: Make sure you have written down your request number and Click OK. This will submit your request.

You must click OK to submit the request. Once you hit OK a red flag will pop up next to the Warehouse line stating **Request added** When you see the screen below the request number has rolled over to a new one and you are ready to enter another request or exit.

And that is all there is to it.

If you get stuck or have a question contact Jennifer Hairell x5449 or Jarius SanAngelo x5541.

We will be happy to help you out.

Tips & Tricks section

Did you forget something? Want to change your order? Want to make sure your request went through? – do the following:
From Warehouse Administration page click on Requests.

You can enter any of the following: the request number, date or the ship code or you can leave them all blank. **Hit find.**
eFinance will pull up all the requests related to the information you gave.

If you want to edit the request or check what was ordered: double click on the request. Click OK and you will be able to see the items you ordered.

If you want to add an item(s) to the order: Click the order once (no double click) and click on **Add Item** at the top of the page.

If you a box pops up and tells you that **there are no unfilled or unapproved lines** that means we have already processed your order and it cannot be edited not even by us. eFinance will not let you see your order at this point. Contact Robert Taylor or Jennifer Hairell so we can help you with your question/request change.

If you get a notice: **Inventory has already reached safety point** this means we do not have any of these in stock currently. Check with us, we probably have them on order.

If an item goes to zero then it has most likely been back ordered and you can verify this by scroll to the right and checking the back order column. If it hasn't please contact us so we can look into it.

You can return an item to the warehouse if you ordered the wrong item please email Robert Taylor to let him know and he will take care of it.

If you have questions, please contact Robert Taylor or Jennifer Hairell for help with your order.

Robert Taylor 764-5541 rtaylor@csisd.org

Jennifer Hairell 764-5449 jenniferhairell@csisd.org

NEW PRODUCT REQUEST FORM

Please Return Completed Form to the Purchasing Department

Date: _____ Campus / Department: _____

Contact: _____ Phone: _____

Reason for new product: _____

Product (include Brand Name): _____

Approximate Annual Usage and Order Quantity: _____

Description (include: Part #, sizes, colors & packaging): _____

Suggested Vendor Name & Phone Number: _____

For Purchasing Department Use Only

Approved by:

Date Added:

Stock Item Number:

Vendor:

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ONLINE ORDERING OF

INSTRUCTIONAL

AND

OFFICE SUPPLIES

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Office Supplies, Equipment and Office Furniture Program Summary

Effective July 1, 2016 Office Supply, Equipment and Office Furniture Products from Office Depot, Wilton's Office Works and Pollock can be viewed and ordered online. The prices shown on the websites are quoted per **PACE P00154**. The secretary at each campus and department has been assigned a username and password. If you are new and need a username and login, please contact the purchasing specialist in Purchasing.

Wilton's Order Process

1. The website address is: www.wiltons.com
2. To logon to the system enter your username and password.
3. Secretary enters order in www.wiltons.com shopping cart and enters the requisition number in the Review and Edit box. Saves order if exiting website.
4. Secretary creates one line item requisition in eFinance and enters CSISD requisition number from eFinance in the Review and Edit Screen of www.wiltons.com and saves order.
5. Purchasing Specialist converts eFinance requisitions into purchase orders.
 - Signs on to www.wiltons.com and changes the requisition number to the CSISD purchase order number in the Order Field.
 - Prints purchase order and forwards for required signature.
6. Purchasing Specialist releases order in www.wiltons.com
7. Secretary will receive an email confirmation from Wilton's when the order has been approved and released.
8. For browse only access, staff may click on "Guest Login".
9. Wilton's will deliver to the campus the next day for orders approved by noon.

Office Depot's Order Process

1. User signs on to www.business.officedepot.com and enters username and password.
2. Secretary at campus or department enters items to order in the www.business.officedepot.com shopping cart. Names the cart, saves cart and closes cart if exiting website and not ready to submit order.
3. Secretary creates requisition in eFinance and enters the CSISD requisition number in the "Review Edit and Screen" of www.business.officedepot.com and submits order for approval.
4. Purchasing Specialist converts eFinance requisitions into purchase orders.
5. Purchasing Specialist signs on to www.business.officedepot.com and enters the CSISD purchase order number in the "Purchase Order" field and releases order in www.business.officedepot.com
6. Secretary and the Business Office will receive an email confirmation from Office Depot once the order is approved by the purchasing department.
7. Office Depot delivers all items to Central Receiving, 9304 Rock Prairie Rd., and the Warehouse Courier will deliver to the campus the following day.

Staple's Order Process

1. Additional Information coming soon.

Amazon Orders

Items that are available in the warehouse should not be ordered from Amazon.

1. Teacher will look up items in Amazon and add it to a wish list (public) and then share that list with the campus secretary and the secretary will order.

Here is How:

- Go to your Amazon.com account. If you don't have one, create one but don't use your school email address.
- At the top right-hand side of the page you will see "Account & Lists" to the left of the shopping cart icon.
- Click the down elevator "v" button and select **Create a List**

On the **Create a List** pop up:

- Create a new Wish List
- Name it campus/dept name and your first initial last name
- Make sure it is Public

Create a List ×

This list is for
You ▼

Choose a list type

Shopping List
Add items you want to shop for.

Wish List
Let people know what gifts you'd like.

Idea List
Make a list for the Amazon community.

List name
CAMPUS/DEPT FIRST INI LAST NAME

Privacy
Private **Public**

People who access your list will see your recipient name. To edit this information, go to Manage List on your list page.

Recipient Name
Carmella

Cancel **Create List**

Find your items and add them to your new wish List


INMAKER No Tie Shoelaces for Kids and Adults, Elastic Shoe Laces for Sneakers, Silicone Tieless Laces


by INMAKER

★★★★☆ 1,649 ratings | 63 answered questions

Price: \$3.99 - \$6.79

To buy, select **Size Name**
Choose from options to the left

 Add to Cart

Add to List 

You will use the drop down on the **Add to List** button to add to the Wish List


When you are finished shopping, **View Your List**

View Your List

Continue shopping

Add any comments, quantity and priority for each item.

Add to Cart

Move  Delete

Add comment, quantity & priority

Then click on **Send List to Others** at the top right-hand corner



In the pop-up copy the link or invite by email.



If inviting by email enter the secretaries email address and click the **Send e-mail button**

Invite others to your list


Invite someone to

VIEW ONLY

Anyone with a link can view your list without making edits

 Copy link  Invite by email

Share this List via Email




 **Wish List**
Link: <https://amzn.com/w/2SJI4OD14MEVW>

To: [Import Contacts](#)

Secretaries email address

Check out my Wish List. Wish Lists are great for keeping track of things you'd like to have and for helping your family and friends

Send me a copy of this Email

Send e-mail

The secretary will receive an email with your wish list and can order straight from it with just a few clicks!

2. Secretary will login to Amazon with district username.
3. Add items to the cart.
4. Verify quantities.
5. Proceed to Checkout
6. Secretary creates requisition in eFinance and enters the CSISD requisition number in the PO number box.
7. Continue
8. Select Delivery Address
9. Verify delivery date(s)
10. Continue
11. Submit Order for Approval

SCHOOL SPECIALTY ONLINE ORDERING

1. Each campus and department will receive a Shared User login and password for creating carts and orders for their location.
2. Campus/Department Users with the shared login and password creates a shopping cart in the school specialty website and submits cart to Campus/Department Approver for approval.
3. Campus/Department Approver receives email notification of user submitted cart that needs approval.
4. Campus/Department Approver reviews and edits cart (if necessary) and approves and submits cart to Administrative Approvers. Email notification is sent to Administrative Approvers of pending orders to be approved and released. Carts can also be rejected and sent back to user.
5. Campus/Department Secretary enters one lot purchase requisition in eFinance for the total amount of the order and references the School Specialty cart number.
6. Purchasing Director approves and signs purchase order. **NO CARTS OR ORDERS WILL BE RELEASED WITHOUT A SIGNED PURCHASE ORDER BY THE PURCHASING DEPARTMENT.**
7. When signed purchase order is received the Administrative Approver adds the PO # to the shopping cart and releases the online order in the School Specialty website.
8. Campus/Department Approver receives email notification that online order has been released and order details.
9. Purchasing Specialist sends green (receiving) and Yellow (originator) copies of purchase order to Campus/Department Secretary.
10. When the order ships the name entered in "Attention To" field receives and email notification of shipment. Users will also be able to check the status of their orders on the School Specialty website under "My Submitted Carts" and Approvers under "My Associates Submitted Carts".
11. Green copy of purchase order is signed and dated by Campus/Department Secretary once all items are verified and received and is forwarded to the Business Office Accounts Payable.

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ASSET DELETIONS

&

SURPLUS PROPERTY

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Asset Deletion Procedure

To remove an item(s) permanently from your campus/department follow these steps:

1. Complete an Asset Deletion Form:

- a. Must have signatures in the Deletion requested by and Deletion approved by lines.
- b. Scan the form and attach to work order.
- c. Attach the original Asset Deletion form to the item(s) being deleted.
- d. Items will likely be picked up before or after hours, so it is important that they are marked clearly.

2. Enter an Asset Deletion Work order:

- a. Sign into eduphoria: go.csisd.org>workorder>logon is the same as the computer

1. Create New Request

2. Click on Warehouse

3. Click on Asset Deletion

4. Choose one of three levels:

- **Asset** \$4999 and under,
- **Fixed Asset** \$5000 and above, or
- **Technology**

5. Enter your Campus

6. Enter your Room or Office number

7. Select Priority: Low, Normal or High

8. Enter list of items to be removed and their location.

- Include details about the item(s). Metal, wood, color, # shelves, approx. dimensions, etc.

9. Click on Attachments. Choose file where scanned copy of the asset deletion form was saved.

10. Click submit request (bottom right hand corner).

3. Warehouse supervisor will schedule the pickup based on other requests. Most likely the items will be picked up before or after hours, so be sure they are clearly marked, and asset deletion form is attached to the items.

4. If the asset deletion form is not attached to the work order it will be closed and items will not be picked up.

___Asset Deletion Request
(\$4,990 and under)

___Fixed Asset Deletion Request
(\$5,000 and over)

___Technology Asset Deletion Request
(printers, faxes, copier, etc.)

Organization/Campus: _____

Date: _____

Deletion Requested By: _____

(Signature of Person Requesting Deletion)

Deletion Approved By: _____

(Signature of Organization Administrator)

Deletion Supervised By: _____

(Signature of Property Manager)

CSISD Tag#	No. of Items	Description/Manufacturer/Model # of Items	Serial #	Room No.	Delete Code*

Include details about the item(s). Metal, wood, color, # shelves, approx. dimensions, etc.

- * Delete Code: R - Scrap/Not Usable
- S1 - Sale/Good Condition/Working
- S2 - Sale/Poor Condition/Needs Repair
- W - Return to Warehouse/Good Condition/Usable
- B- Burglary
- D- Disassembled for Parts
- T- Trade-In
- X - Unknown/Cannot Locate

Check if there are Items to be picked up and returned to the Warehouse

Received by Warehouse Supervisor: _____

Scan form and attach to work order.
Enter work order at go.csisd.org
Tape form to item(s) to be removed.

Asset Transfer Request
(\$4,990 and under)

Fixed Asset Transfer Request
(\$5,000 and over)

Technology Asset Transfer Request
(printers, faxes, copier, etc.)

Campus/Dept.: _____

Date: _____

Transfer Requested By: _____
(Signature of Person Requesting Transfer)

Transfer Approved By: _____
(Signature of Organization Administrator)

Transfer Supervised By: _____
(Signature of Property Manager)

CSISD Tag#	No. of Items	Description/Manufacturer/Model # of Items	Serial #	From Room No.	To Room No.	

Include details about the item(s). Metal, wood, color, # shelves, approx. dimensions, etc.

Person Who Received Item(s): _____
Signature of Person Receiving Items

Receiving Campus/Dept: _____ Date Item(s) Received: _____

Scan form and save to be attached to work order
Enter a work order at go.csisd.org
Select Warehouse > Transport Items Work Order
Attach the form to the work order
Tape form to item(s) to be moved.



Department of Grants Compliance and Oversight Inventory Disposition Request

Disposition approval is required when equipment originally purchased with federal grant funds is no longer needed for the original project, programs currently funded by other USDE grants, or projects previously supported by USDE grants.

In accordance with 2 CFR 200.313 and 200.314, complete and submit this form to request approval to dispose of equipment or supplies and materials purchased with federal grant funds. If you are not disposing of the item but rather are transferring it to a federal program on another campus or another federal program on the same campus, this form **may** be submitted but is **not** required.

Complete a separate copy of this form to request disposition of items purchased with funds from different federal grants.

Name of grantee County-district # Name of federal grant

Market Value \$5,000 or Less (Or Local Capitalization Policy, Whichever Is Less)

Equipment and unused supplies and materials with a current per-unit fair market value of less than \$5,000 may be retained, sold, or otherwise disposed of with no further obligation to TEA or the federal government.

If you check both of the boxes below, leave the next two sections blank. Complete the certification section and submit the signed form as directed.

- The grantee has no equipment purchased with federal grant funds with a current per-unit fair market value in excess of \$5,000.
- The grantee has no unused supplies or materials purchased with federal grant funds with an aggregate current fair market value in excess of \$5,000.

Equipment with Market Value Greater Than \$5,000 (Or Local Capitalization Policy, Whichever Is Less)

Item description Serial # Item location

Date of purchase Purchase price % paid w/ grant funds Current fair market value Condition

Check one of the following boxes to indicate the reason for disposition or transfer:

- Inventory disposed under 2 CFR 200.313-314, funds will be returned to TEA to return to the federal government.

Required: NOGA ID of grant used to originally purchase item

Provide a justification for disposing of the equipment item. Attach a list of multiple items on a separate sheet. All proceeds from the disposition will be refunded to TEA.

- Transfer item to another campus that is implementing the same federal program.
- Transfer item to a similar federal program.
- Equipment was stolen, with appropriate report to authorities. Internal controls are in place to prevent further theft.
- Equipment was lost, with appropriate report to authorities. Internal controls are in place to prevent future loss.

Supplies/Materials with Aggregate Market Value Greater Than \$5,000 (Or Local Capitalization Policy, Whichever Is Less)

Item description Serial # Item location Date of purchase

Purchase price Percentage paid w/ grant funds Current aggregate fair market value Condition

Check one of the following boxes to indicate the reason for disposition or transfer:

- Inventory disposed under 2 CFR 200.313-314, funds will be returned to TEA to return to the federal government.

Required: NOGA ID of grant used to originally purchase item

Provide a justification for disposing of the supplies. Attach a list of multiple items on a separate sheet. All proceeds from the disposition will be refunded to TEA.

- Transfer item to another campus that is implementing the same federal program.
- Transfer item to a similar federal program.
- Supplies and materials were stolen, with appropriate report to authorities. Internal controls are in place to prevent further theft.
- Supplies and materials were lost, with appropriate report to authorities. Internal controls are in place to prevent future loss.

Certification

This form must be signed by the authorized official. Email the signed form to TEA's Department of Grants Compliance and Oversight (GCO) at grants@tea.texas.gov, or fax to (512) 463-7915 or (512) 463-9811.

Name and title of authorized official Signature and date

For TEA Use

Inventory disposition or transfer is approved as requested, based on the information provided.

Inventory disposition or transfer is approved with the following changes:

- Inventory disposition/transfer is denied.


Signature of GCO associate commissioner and date

Available Surplus Request Procedures

Surplus property is available for district use only. Please follow these steps when requesting a Surplus item:

1. Contact the Warehouse at 764-5541 or 764-5449 for available items. **Schedule a time to come by the warehouse to view the items prior to making a request.** The Warehouse is open Monday through Friday from 7:00 am - 4:30 pm. Please let us know you are coming and remember to bring your badge.
2. If you want to request an item **that you viewed** at the warehouse, you will need to **enter a work order in eduphoria (go.csisd.org).**
3. Requests are not accepted by email or phone.

Sign into **eduphoria (go.csisd.org)**:

- Click on **Warehouse**
- **Available Surplus Transfer** (Shopping Cart image)  See something on the available surp
- Enter your information. Be sure to include a description of the item and the Room Number where we are delivering the requested item.

Please be sure to come by and look at the item before you enter the work order. We want to make sure the item will work in the space you have and will fit your needs. Remember these items are all used gently or otherwise.

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RECORDS

RETENTION

SCHEDULES

Definition of a local government record

A "local government record" means any document, paper, letter, book, map, photograph, sound or video recording, microfilm, magnetic tape, electronic medium, or other information-recording medium, regardless of physical form or characteristic and regardless of whether public access to it is open or restricted under the laws of the state, created or received by the District or any of its officers or employees, pursuant to law or in the transaction of public business.

The term does not include:

1. Extra identical copies of documents created only for convenience of reference or research by District officers or employees.
2. Notes, journals, diaries, and similar documents created by a District officer or employee for his or her own personal convenience.
3. Blank forms, stocks or publications, and library and museum materials acquired solely for the purposes of reference or display.
4. Copies of documents in any media furnished to the public under the Open Records Act or other state law.

Loc. Gov't. Code 201.003(8)

COLLEGE STATION I. S. D.
9304 ROCK PRAIRIE ROAD, COLLEGE STATION, TX 77845
(979) 764- 5408

PURCHASING OFFICE

INTER-DEPARTMENTAL MEMO

TO: Principals, Administrators, and Records Liaison Officers
FROM: Carmella Shafer, Director of Purchasing
DATE: September 11, 2020
SUBJECT: Records Retention Pick Up, Storage and Destruction

It is time again to start packing records that you want to be stored in the Purchasing Records Retention Center and destroyed after their retention period. **Records will be picked up starting Monday, November 2 through Friday November 13.** Campuses/departments will not have a set day, so please have all boxes ready to be picked up on these days. The warehouse staff will be on a very tight schedule, **so please stack the records storage boxes in one area. Official Records Storage boxes** (15x12x10) must be used to store records and are available to be purchased from the warehouse (item 128100). Each box should be marked (use a permanent marker) on **one side** of the outside of the box with the following information:

Only on one side of the box write:

1. **Department/Office/School**
2. **Box Number**
3. **Contents**
4. **Destruction Date** (No box should be sent without a destruction date! All documents in the same box must have the same destruction date)



Boxes are available from the warehouse (128100)

Prepare a "Storage Transmittal Form" for each storage container being sent to records retention and attach it to the top of the box. A "Storage Transmittal Form" is attached.

Please see attached records schedules to determine the scheduled destruction date for the record type.

If you have any questions, please call Carmella at ext. 5617 or email cshafer@csisd.org or Jennifer Hairell at ext. 5449 or email jenniferhairell@csisd.org

Attachment

Note: Please remember that all records stored in a box should have the same destruction date.

COLLEGE STATION INDEPENDENT SCHOOL DISTRICT STORAGE CONTAINER TRANSMITTAL FORM

Please prepare one form for each standard storage container to be sent

Department/Office/School _____

Box Number _____ of _____

Contents _____

Destruction Date **October 20** _____

Documents Scanned to Laserfiche * Yes _____ No _____

Sender Name _____

To be completed at record center:

Aisle _____ Shelf _____ Position _____ Stack _____

Date Returned to Originator _____

Record Retention Box Number _____

Records must be in an Official Records Storage Box (12x15x10).

*Documents that have been scanned into the Laserfiche program still need to be packed, labeled, picked up and stored like other documents. They should not be shredded or discarded by the Department or Campus. The Purchasing Department will make the final decision as to the destruction of all records.

10/01/2019



Local Government Retention Schedules

Jump to:

[CC](#) | [DC](#) | [EL](#) | [GR](#)

[HR](#) | [JC](#) | [LC](#) | [PS](#)

[PW](#) | [SD](#) | [TX](#) | [UT](#)

WARNING: Unless these retention schedules have been adopted by your local government by filing a Declaration of Compliance ([form SLR 508](#) (<https://www.tsl.texas.gov/sites/default/files/public/tslac/slr/recordspubs/forms/slr508.pdf>)), the retention periods listed in the schedules **may not be used** for the destruction of your records.

Related:

- [Forms and Templates](https://www.tsl.texas.gov/slr/forms) (<https://www.tsl.texas.gov/slr/forms>)
- [Laws and Rules](https://www.tsl.texas.gov/slr/publications) (<https://www.tsl.texas.gov/slr/publications>)
- [Proposed Revisions to TSLAC Retention Schedules](https://www.tsl.texas.gov/slr/retentionscheduleupdates) (<https://www.tsl.texas.gov/slr/retentionscheduleupdates>)
- [Contact Us](https://www.tsl.texas.gov/slr/contact) (<https://www.tsl.texas.gov/slr/contact>)

GR: Records Common to All Local Governments

[\(/sites/default/files/public/tslac/slr/recordspubs/Schedule%20GR%20Revised%205th%20-%20Effective%202016-04-17.pdf\)](/sites/default/files/public/tslac/slr/recordspubs/Schedule%20GR%20Revised%205th%20-%20Effective%202016-04-17.pdf)

(Revised Fifth Edition) - Effective April 17, 2016

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- Part 1: Administrative Records
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SD: Records of Public School Districts

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[\(/sites/default/files/public/tslac/slr/recordspubs/Schedule%20SD%203rd%20Edition%20-%20Effective%202018-05-23.pdf\)](/sites/default/files/public/tslac/slr/recordspubs/Schedule%20SD%203rd%20Edition%20-%20Effective%202018-05-23.pdf)

- Part 1: Student Academic Records
- Part 2: Family Educational Rights and Privacy Act Records
- Part 3: Records of Special Populations and Services
- Part 4: Attendance Records
- Part 5: Student Health Records
- Part 6: Instruction and Grade Reporting Records
- Part 7: Discipline and Counseling Records
- Part 8: Adult and Vocational Education Records
- Part 9: Drivers Education Records
- Part 10: Accreditation Records
- Part 11: Food Service Records
- Part 12: Textbook Records
- Part 13: Transportation Records
- Part 14: School Safety Records
- Part 15: Financial Records
- Part 16: Personnel and Staffing Records
- Part 17: Miscellaneous Reports and Surveys
- Part 18: Miscellaneous Records
- Part 19: Library Records



LOCAL SCHEDULE SD (Third Edition)

RETENTION SCHEDULE FOR RECORDS OF PUBLIC SCHOOL DISTRICTS

This schedule establishes mandatory minimum retention periods for records that are associated with Public School Districts. No local government office may dispose of a record listed in this schedule prior to the expiration of its retention period. A records control schedule of a local government may not set a retention period that is less than that established for the record in this schedule. Original paper records may be disposed of prior to the expiration of their minimum retention periods if they have been microfilmed or electronically stored pursuant to the provisions of the Local Government Code, Chapter 204 or Chapter 205, as applicable, and rules of the Texas State Library and Archives Commission adopted under those chapters. Actual disposal of such records by a local government is subject to the policies and procedures of its records management program.

Destruction of local government records contrary to the provisions of the Local Government Records Act of 1989 and administrative rules adopted under it, including this schedule, is a Class A misdemeanor and, under certain circumstances, a third degree felony (Penal Code, Section 37.10). Anyone destroying local government records without legal authorization may also be subject to criminal penalties and fines under the Public Information Act (Government Code, Chapter 552).

INTRODUCTION

The Government Code, Section 441.158, provides that the Texas State Library and Archives Commission shall issue records retention schedules for each type of local government, including a schedule for records common to all types of local government. The law provides further that each schedule must state the retention period prescribed by federal or state law, rule of court, or regulation for a record for which a period is prescribed; and prescribe retention periods for all other records, which periods have the same effect as if prescribed by law after the records retention schedule is adopted as a rule of the Commission. If applicable, the wording of the records series will match that of any federal or state law, rule of court, or regulation, and citation to law, rule, or regulation will be provided in the Remarks section.

Retention periods listed in this schedule apply to records in any medium. If records are stored electronically, they must remain available and accessible until the retention period assigned by this schedule, along with any hardware or software required to access or read them. Electronic records may include

electronic mail (e-mail), websites, electronic publications, or any other machine-readable format. Paper or microfilm copies may be retained in lieu of electronic records.

The use of social media applications may create public records. Any content (messages, posts, photographs, videos, etc.) created or received using a social media application may be considered records and should be managed appropriately. The retention of social media records is based on content and function. Local governments will need to consult the relevant records retention schedule for the minimum retention periods.

Unless otherwise stated, the retention period for a record is in calendar years from the date of its creation. The retention period applies only to an official record as distinct from convenience or working copies created for informational purposes. Where several copies are maintained, each local government should decide which shall be the official record and in which of its divisions or departments it will be maintained. Local governments in their records management programs should establish policies and procedures to provide for the systematic disposal of copies.

A local government record whose retention period has expired may not be destroyed if any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record is initiated; its destruction shall not occur until the completion of the action and the resolution of all issues that arise from it.

A local government record whose retention period expires during any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record may not be destroyed until the completion of the action and the resolution of all issues that arise from it.

If a record described in this schedule is maintained in a bound volume of a type in which pages were not meant to be removed, the retention period, unless otherwise stated, dates from the date of last entry.

If two or more records listed in this schedule are maintained together by a local government and are not severable, the combined record must be retained for the length of time of the component with the longest retention period. A record whose minimum retention period on this schedule has not yet expired and is **less than permanent** may be disposed of if it has been so badly damaged by fire, water, or insect or rodent infestation as to render it unreadable, or if portions of the information in the record have been so thoroughly destroyed that remaining portions are unintelligible. If the retention period for the record is **permanent** in this schedule, authority to dispose of the damaged record must be obtained from the Director and Librarian of the Texas State Library and Archives Commission. A Request for Authority to Destroy Unscheduled Records (Form SLR 501) should be used for this purpose.

Certain records listed in this schedule are assigned the retention period of AV (as long as administratively valuable). This retention period affords local governments the maximum amount of discretion in determining a specific retention period for the record described.

Local Schedule SD sets mandatory minimum retention periods for records series (identified in the Records Series Title column) commonly found in local education agencies other than state colleges and universities and junior colleges. Except as noted below, it is for the use of public school districts of all types, regional educational service centers, educational cooperatives for special education or other purposes, rehabilitation districts, county industrial training school districts, and county vocational districts.

Local Schedule SD is also for the use of **active** offices of county superintendents of schools and county departments of education. The retention periods for the records of **abolished** offices of county superintendents of schools, some of which may be in the custody of local education agencies, are given in Part 6 of Local Schedule CC (Records of County Clerks).

Use of Asterisk (*)

The use of an asterisk (*) in this revised third edition of Local Schedule SD indicates that the record is either new to the third edition, the retention period for the record has been changed for the record, or substantive amendments have been made to the description of or remarks concerning the record. An asterisk is not used to indicate minor amendments to grammar or punctuation.

ABBREVIATIONS USED IN THIS SCHEDULE

AV - As long as administratively valuable
CE - Calendar year end
CFR - Code of Federal Regulations
FE - Fiscal year end
TAC - Texas Administrative Code
US - Until Superseded
LA – Life of Asset

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RECORDS OF PUBLIC SCHOOL DISTRICTS

Retention Notes: a) OTHER SCHEDULES - This schedule should be used by public school districts, regional educational service centers, and other local education agencies (as defined on page 2) in conjunction with Local Schedule GR (Records Common to All Governments) and Local Schedule TX (Records of Property Taxation). In particular, many records maintained by public school districts are includable among the general administrative, financial, and personnel record series in Local Schedule GR, especially those relating to grant allocations, funding, and reporting. In any instances of conflict between retention periods established in this schedule and in Local Schedules GR or TX, the retention periods in this schedule shall prevail.

b) GRANT RECORDS - The 5-year retention period frequently established for records of school districts in this schedule and Local Schedule GR derives from federal requirements in, which declares the following: These requirements involve the retention of financial and programmatic records, including supporting documents, statistical reports, and other records pertinent to program regulations or the grant agreement relating to projects or programs funded by the U.S. Department of Education through subgrants using federal funds from the Texas Education Agency.

These federal regulations require that all records of the types mentioned must be available for audit for 3 years after the date of submission of the single or last expenditure report by the Texas Education Agency as subgrantor, **not** by the school district. Because final expenditure reports are submitted by the Texas Education Agency **after** all reports from districts are received, a 5-year retention period for many records of school districts is necessary to satisfy this requirement adequately.

If an audit is pending in which an expenditure or the eligibility of a student to participate in a federal program is questioned, then all records affecting the outcome of the audit must be retained until the audit is settled.

Copies of reports or records submitted to the Texas Education Agency must be retained by school districts in accordance with this schedule.

For additional information on grant records, see pages 20 and 21 of Local Schedule GR.

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CONTRACT

MANAGEMENT

CONTRACT MANAGEMENT PROCEDURE

Goal: To ensure a systematic process to review and approve contracts with vendors to include purchases, services, maintenance agreements, construction, and other contracts as appropriate.

Contract Approval Authority:

- The Superintendent or his designee has been designated by the Board of Trustees to approve and execute all contracts for the purchase of goods or services for all single purchases that are less than \$50,000.
- The Board of Trustees retains the authority to approve all contracts for the purchase of goods or services for any single purchase that exceeds \$50,000.

Contract Review:

- The requestor or originator [campus or department] shall forward the Contract document(s) to the Director of Purchasing for review.
- The Contract Checklist Form shall be completed by the Director of Purchasing and attached to the Contract document(s) and forwarded to the Chief Financial Officer.
- The Contract documents shall include the vendor/contractor's contract form or the College Station ISD Contract.
- If the proposed vendor is new to the district, a completed College Station ISD Vendor Bid Application Packet shall be included with the contract documents.
- The Chief Financial Officer shall review the Contract Checklist.
- If the Contract is recommended as is, the Contract and review checklist will be returned to the originator to process a Purchase Order (PO) and attach the contract and Contract Review Checklist to the PO.
- The Director of Purchasing will retain the Vendor Bid Packet and save the Contract Review Checklist and Contract on the Business Share Drive.
- If the Contract is not acceptable as is, the Chief Financial Officer shall contact the contracting party to attempt to resolve the deficiency (ies).
 - Legal advice from the district's legal firm shall be obtained as necessary to remedy the contract deficiencies.
- If the Contract is not acceptable and cannot be corrected to an acceptable form, the Chief Financial Officer shall reject the contract and notify the originator. The rejected contract shall be filed in the Purchasing Department.
- The Receptionist for the Director of Purchasing shall file the rejected contract under vendor name, contract title, term, source of funds.

Procedures: Contract Management July 27, 2017

CONTRACT MANAGEMENT PROCEDURE

Contract Approval:

- The Chief Financial Officer shall return the original, signed Contract and Checklist to the originator to process a Purchase Requisition (PR).
- If the contract also requires School Board approval, the Chief Financial Officer shall prepare the Action Item for approval at the next regularly scheduled board meeting.
- If approved, the Executive Assistant for the Superintendent shall return the original, signed Contract to the Chief Financial Officer.
 - Upon receipt of the original, signed contract, the Chief Financial Officer shall forward the original contract and checklist to the originator to process a Purchase Requisition (PR) and the originator will upload the contract and checklist as an attachment to the PR.
- If necessary, the purchasing specialist shall enter the new vendor in the eFinance system by request from the originator.
 - If the originator does not enter a purchase requisition (PR) and forward the contract documents to the purchasing specialist within thirty (30) business days, the Contract shall be voided. Notification shall be made by the Chief Financial Officer or his designee by email to the originator regarding the Contract cancellation.

Purchase Commitment for Contract (Purchase Order):

- The requestor shall submit a purchase requisition (PR) for the annual cost [fiscal year] of the contract.
- Upon receipt of the purchase requisition, the purchasing specialist shall ensure review and approve the requisition in accordance with the district's Purchasing Procedures.
- The purchasing specialist shall attach a copy of the approved contract to the purchase order and forward to the Director of Purchasing for approval in accordance with the district's Purchasing Procedures.
- Upon approval and signature of the purchase order, the Purchasing Specialist shall forward a copy of both the approved contract and purchase order to the vendor.

Procedures: Contract Management July 27, 2017

CONTRACT MANAGEMENT PROCEDURE

Contract Filing Procedures:

- Upon receipt of a fully executed Contract and Vendor Application Packet, the Director of Purchasing shall file the contract as noted below:
 - Scan the Contract to a PDF and file in the Shared Business contract folder, and
 - Submit the original Contract to Purchasing to file.
- Contracts shall be filed by the length of the contract as noted below:
 - One-time or single fiscal year contracts shall be filed by fiscal year
 - Multi-year, term and recurring contracts shall be filed by vendor name
- An Excel spreadsheet of all multi-year contracts shall be maintained by the Receptionist for Purchasing. The spreadsheet shall contain the following information (at a minimum):
 - Vendor name and number
 - Starting and ending date of contract
 - Non-renewal or cancellation terms (for recurring contracts)

Contract Management:

- The originator shall be directly responsible to ensure that the contracting party performs the services covered by the Contract. The contract originator shall sign the invoice to certify that the work was completed to satisfactory standards.
- Upon completion of the service(s), the originator shall forward the receiving copy (green) of the purchase order to the Accounts Payable Analyst to request that payment be made to the contracting party.
- The Accounts Payable Analyst shall make partial or final payments only upon receipt of an invoice signed by the originator. The signature of the originator is verification that the services have been performed and that the payment should be made to the contracting party.

Procedures: Contract Management July 27, 2017

Contract Review Checklist

Vendor:	Contract Amount:	Funds:
----------------	-------------------------	---------------

Yes	No	N/A	Activity
			Contracting parties are correct?
			Term of contract is specified?
			Multi-year contract has a funding out clause on a fiscal year basis?
			Contract has an "auto-renew" provision?
			Venue is listed as Brazos County, Texas?
			Governing Law is the State of Texas?
			Amendments, if any, must be in writing and agreed to by both parties?
			Dispute resolution is mediation?
			Dispute resolution is arbitration?
			Termination clause has a "with or without cause" provision?
			Indemnification clause is worded appropriately (In accordance with Texas law)
			Payment terms, in accordance with Texas Prompt Payment Act?
			Attorney Fees are specified?
			Severability Clause is present?
			Confidentiality Clause is appropriately worded? (Subject to Texas PIA)
			Ownership of intellectual property for items created?
			Person (vendor) is indebted to district (if restricted in CH Local)?
			Professional services contracts were obtained under Govt. Code 2254.003?
			Interlocal Agreements: Vendor has stipulated contract-related or management fees? [Must report these fees to Board in writing on an annual basis.]
			Certificates of Insurance are required?
			Payment and/or Performance Bonds are required?
			Criminal history: Felony Conviction Form has been submitted for contractor and subcontractor, if any
			Criminal history: Vendor has certified that all contractor and subcontractor employees have been subject to a national criminal history [applicable if the contract includes "continuing duties" or "direct (unsupervised) contact with a student(s)"]
			Conflict of Interest Questionnaire
			Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion from Lowered Tiered Transactions
			If a federal contract Proposer/Vendor Certification Forms <i>Complete checklist for district contracts under federal awards</i>
			Certificate of Interested Parties Form 1295 (after contract is signed by both parties)
			Certification Regarding Terrorist Organizations and Boycott of Israel

Reviewed by:	Date:
Contract Recommended: ()Yes ()No	Revised 8.8.17

CONTRACT PROVISIONS CHECKLIST FOR DISTRICT CONTRACTS UNDER FEDERAL AWARDS

Yes	No N/A	Activity
		If the contract is more than the simplified acquisition threshold (\$250,000), does the contract contain provisions that address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate?
		If the contract is more than \$10,000, does the contract address termination for cause and for convenience by the District including the manner by which it will be effected and the basis for
		If the contract is considered a "federally assisted construction contract" in 41 CFR Part 60-1.3, does the contract contain the required equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor"?
		If the contract is a construction contract in excess of \$2,000, does the contract include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction")? Does the contract also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from
		If the contract is in excess of \$100,000 and involves the employment of mechanics or laborers, does the contract include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5) pertaining to contract work hours and safety
		If the Federal award meets the definition of "funding agreement" under 37 CFR §401.2 (a) and the District is entering into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement," does the contract contain language regarding compliance with the requirements of 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any
		If applicable, and if the contract awarded is in excess of \$150,000, does it contain a provision that requires the compliance with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42
		Has the vendor/contractor certified that such party is not debarred from receiving a contract from the federal government?
		For contracts exceeding \$100,000, has the vendor/contractor certified that that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352? Has the vendor/contractor made the required disclosure of any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award?

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EDGAR

PROCEDURES

**See Business Office Website for complete
State & Federal Grants Manual**

EDUCATION DEPARTMENT GENERAL ADMINISTRATIVE REGULATIONS (EDGAR)

For all purchases with federal grants, the district shall comply with the federal regulations, EDGAR related to the purchasing of goods and services ([2 CFR 200.317-200.327](#)). If the EDGAR regulations below conflict with State laws or regulations the more restrictive policy must be followed. Violation of procurement law can result in contract being void, initiate protest from vendors, litigation, repayment of federal funds and criminal penalties for the employees involved. All federal fund purchases must be aggregated by fiscal year by Commodity Code/Like Type Item. 2 CFR §200.320 officially sets the micro-purchase threshold at \$10,000 in the aggregate across all federal grant programs for the fiscal year. It also allows the LEA to self-certify a higher micro purchase threshold of up to \$50,000 if the LEA meets either of the following criteria: is a low-risk auditee for their most recent federal audit, conducts an annual internal risk assessment to identify, mitigate, and manage financial risk. Due to state Financial Accountability System Resource Guide (FASRG) rules, the LEA may only self-certify a threshold up to \$49,999. The LEA must determine the local threshold based on internal controls, risk, and documented procedures. The Business Office self-certifies the micro-purchasing threshold annually at FYE based the above requirements. Effective, 9/1/2022 the district self-certified the micro-purchase threshold at \$25,000.

EDGAR Procurement Standards ([2 CFR 200.317-200.327](#))

§ 200.317	Procurements by states.
§ 200.318	General procurement standards.
§ 200.319	Competition.
§ 200.320	Methods of procurement to be followed.
§ 200.321	Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms.
§ 200.322	Domestic preferences for procurements.
§ 200.323	Procurement of recovered materials.
§ 200.324	Contract cost and price.
§ 200.325	Federal awarding agency or pass-through entity review.
§ 200.326	Bonding requirements.
§ 200.327	Contract provisions.

Types of EDGAR Purchases

- **Micro Purchase under \$25,000**- Quotations not required. Distribute equitably among qualified sources. Vendor must sign EDGAR Proposer/Vendor Certification Form and Conflict of Interest Questionnaire. All federal fund purchases must be aggregated by fiscal year by Commodity Code/Like Type Item. EDGAR 200.320(a).
- **Small Purchase \$25,001-\$49, 999 in the aggregate**- two quotes from qualified sources; selected vendor must sign EDGAR Proposer/Vendor Certification Form and Conflict of Interest Questionnaire. Attach both quotes to the requisition. If selecting the item with a higher cost, then provide an explanation why. 200.320(b)
- **Competitive Bid \$50,001-\$250,000 in the aggregate**- Default to State Rules 44.031 because it is more restrictive. Formal sealed bid or proposal publicly advertised by the Purchasing Department or the use of a cooperative bid. Board approval required.
- **Simplified Acquisition Threshold \$250,000+ in the aggregate**-Formal sealed bid, proposal or Request for Qualifications publicly advertised by the Purchasing Department. An **Independent Estimate form** must be completed prior to procurement and a **Cost/Price Analysis form** must be completed by the Purchasing Department following the procurement to document that each selected vendor's offered price was fair and reasonable.
- **Non-Competitive (Sole Source)** - purchase of goods or services from a "sole source vendor". A sole source vendor is defined as a vendor that meets the following requirements:
 - The goods or services are only available from a single source. The district shall acquire and maintain a copy of a vendor's sole source letter which specifies the statutory or other reason for its sole source status
 - A public exigency or emergency will not permit a delay resulting from the competitive solicitation process. The board shall declare an emergency prior to making such purchase

- The granting agency or pass-through entity authorized the use of a non-competitive proposal method. District shall obtain written approval/authorization form from the granting agency or pass-through entity (TEA Division of Grants Administration)
- After solicitation of a number of sources, competition is determined to be inadequate based on only one responsive vendor
- Requires approval from TEA.
- **Professional Services (2 CFR 200.459)**
 - Costs of professional and consultant services rendered by persons who are members of a particular profession or possess a special skill, and who are not officers or employees of the non-Federal entity, are allowable, subject to [paragraphs \(b\)](#) and [\(c\)](#) of this section when reasonable in relation to the services rendered and when not contingent upon recovery of the costs from the Federal Government. In addition, legal and related services are limited under [§ 200.435](#).
 - EDGAR requires that the district select contractors based on the reasonableness of the fee, the necessity of the service, the qualifications of the contractor and other criteria.
 - Firm must provide a Statement of Qualifications with the proposal to the Grant Manager for approval prior to the creation of an agreement or purchase order
 - Staff or professional development may be considered a professional service. Grant Manager must furnish documentation of the trainer's particular skills in providing the specific training or staff development being requested.
 - Contracted Services by Education Service Center (ESC) - generally not considered professional services.

Commodity Codes/Like Type Items

Commodity Codes/Like Type Items with current spend totals is saved on the Google Drive. [Link to Commodity Codes/Like Type Items](#). The Like Items/Commodity Code list is updated periodically based on purchasing needs.

Dispute Resolution

EDGAR 200.318(k) makes grantees responsible for the “settlement of all contractual and administrative issues arising out of procurements.” The district is responsible for settling procurement issues including source evaluation, protests, disputes, and claims, as well as any other disputes that may arise. TEA is responsible for judging only those contract matters that are primarily of federal concern. Violations of law will be referred, as appropriate, to the legal authority with jurisdiction.

District State and Federal Grant Manual

The State and Federal Grants Manual is maintained by the Business Offices and located on their web page. [Click here for the district's State and Federal Grant Manual](#).

2021-22 CSISD PURCHASING LEVELS AND REQUIREMENTS

PURCHASE COMMITMENT AMOUNT	STATE AND LOCAL FUNDS PURCHASE Support Required	FEDERAL FUNDS "2" PURCHASE Support Required
For purchases Less than \$25,000.00 (Micro-purchase/Fed Funds)	1 QUOTE	1 QUOTE
	OR USE OF DISTRICT OR CO-OP BID	OR USE OF DISTRICT OR CO-OP BID
For purchases of \$25,000.00 to \$49,999.99 (by Commodity Code for Federal Funds) (Small purchase/Fed Law)	2 Quotes	2 QUOTES Minimum
	OR USE OF DISTRICT OR CO-OP BID	Recommend 3 (even if using DISTRICT or Co-op BID) Quote can be internet print out.
For purchases of \$50,000 and over (by Commodity Code for Federal Funds) (Small purchase/Fed Law) Competitive Procurement/Texas Law	USE OF DISTRICT OR CO-OP BID VENDOR + 2 QUOTES RECOMMENDED + BOARD APPROVAL	2 QUOTES Minimum Recommend 3 (even if using DISTRICT or CO-OP BID) Quote can be internet print out.
	(Education Code 44.031)	(Education Code 44.031)
For purchases over \$250,000.00 (by Commodity Code for Federal Funds) (Single Acquisition Threshold/Fed Law) Competitive Procurement/Texas Law	USE OF DISTRICT OR CO-OP BID VENDOR + 2 QUOTES RECOMMENDED + BOARD APPROVAL	2 QUOTES Minimum Recommend 3 (must use DISTRICT or CO-OP BID vendor) Quote can be internet print out. + Independent Est. by Purchasing prior to bid advertisement
	(Education Code 44.031)	
SOLE SOURCE PURCHASE \$50,000.00 and over Less than \$50,000 (no agenda item)	1 QUOTE + DISTRICT SOLE SOURCE FORM COMPLETED BY EMPLOYEE + BOARD APPROVAL (IF OVER \$50,000)	1 QUOTE + DISTRICT SOLE SOURCE FORM COMPLETED BY EMPLOYEE + TEA APPROVAL+BOARD APPROVAL (IF OVER \$50,000)

** All federal fund purchases must be aggregated by fiscal year by Commodity Code/Like Type Item. When we reach the \$25,000 total purchases by Commodity Code/Like Type Item the purchase is then considered a **Small Purchase and 2 quotes are required.**
The district defines the Commodity Codes/Like Type Items, but a single PO or single vendor purchases cannot be considered an item. The list of items must be made available for TEA and/or federal auditors. CFR 200.320 (a)(1)(iii).

[Click here to go the awarded vendor list](#)

[Click here to go to the Commodity Code/Like Type Item List](#)

2021-22 COLLEGE STATION I.S.D. PURCHASING LEVELS AND REQUIREMENTS

Purchases with FEDERAL FUNDS (budget code STARTS WITH "2")						
Federal Fund purchases must be tracked/aggregated by Commodity Codes/Like Type Items for all federal funds **						
Purchase Commitment Amount	Support Required	Additional Forms	RFP/RFQ	Board Approval	Advertising	
For aggregate purchases Less than \$25,000.00 (Micro-purchase/Fed Funds)	1 QUOTE	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED	
For aggregate purchases of \$25,000 to \$49,999.99 by Comm. Code (Small purchase/Fed Law)	2 QUOTES Min. Recommend 3 (even if using DISTRICT or Co-OP BID)	2 QUOTES min. Can be internet print outs	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED	
For aggregate purchases \$50,000 and over by Comm. Code (Small purchase/Fed Law) Competitive Procurement/Texas Law	USE OF DISTRICT OR Co-OP BID (Education Code 44.031)	2 QUOTES Min.	REQUIRED if not using current district bid or Co-op bid	BOARD AGENDA ITEM REQUIRED	REQUIRED for Two (2) consecutive weeks + 2 weeks for responses + 2 weeks for analysis and board meeting (6 wks)	
For aggregate purchases over \$250,000 by Comm. Code (Single Acquisition Threshold/Fed Law) Competitive Procurement/Texas Law	COMPETITIVE PROCUREMENT USE OF DISTRICT OR Co-OP BID (Education Code 44.031)	Independent Est. by Purchasing prior to bid advertisement	REQUIRED if not using current district bid or Co-op bid	AGENDA ITEM REQUIRED	REQUIRED Two (2) consecutive weeks	
SOLE SOURCE PURCHASE * \$50,000.00 and over	1 QUOTE	DISTRICT SOLE SOURCE FORM COMPLETED BY EMPLOYEE AND TEA Form (Approval by TEA required) Rare and expect 2-3 weeks min. for response	NOT REQUIRED	AGENDA ITEM REQUIRED	NOT REQUIRED	
Less than \$50,000 (no agenda item)				NOT REQUIRED (if below \$50,000)		

* Currently TEA has approved Education Service Center 20 as a sole source vendor. All other vendors require case by case approval from TEA.

** All federal purchases will be aggregated by fiscal year by Commodity Code/Like Type Item. When we reach the \$25,000 total purchases by Commodity Code/Like Type Item the purchase is then considered a Small Purchase and 2 quotes are required. The district defines the Commodity Codes/Like Type Items, but a single PO or single vendor purchases cannot be considered an item. The list of items must be made available for TEA and/or federal auditors. CFR 200.320 (a)(1)(iii).

Purchases with Child Nutrition Funds						
Purchase Commitment Amount	Support Required	Additional Forms	RFP/RFQ	Board Approval	Advertising	
For purchases less than \$10,000 , spread equitably across vendors. (Micro-purchase/Fed Funds)	1 Quote, but make sure reasonable pricing and spread equitably across vendors/suppliers	Required Documentation	Not Required	Not Required	Not Required	
For purchases \$10,000 - \$50,000 (Small Purchase/Fed Funds)	3 Quotes	Not Required	Not Required	Not Required	Not Required	
For purchases over \$50,000 (Single Acquisition Threshold/Fed)	Competitive Procurement (ARM Section 17)	Bid or Proposal	Required	Board Agenda Item Required	Required Two (2) consecutive weeks	

FORMS

COLLEGE STATION ISD INDEPENDENT ESTIMATE DETERMINATION

Purpose: Federal regulations require documentation of cost analysis or price analysis for every procurement action at or above \$250,000. As part of the analysis, the regulations require documentation of an independent estimate reached before receiving bids or proposals (see 2 C.F.R. § 200.323) or before receiving quotes or proposals from other governmental entities through an interlocal contract or a purchasing cooperative (see 2 C.F.R. § 200.318 (e)). The Independent Estimate Determination is a form used to document CSISD's estimated range of fair and reasonable costs for the goods and/or services to be acquired and to document the analysis **PRIOR** to seeking bids, proposals, or quotes. The form is kept as part of the procurement file along with the cost or price analysis, which is conducted after receiving proposals but before awarding a contract, to demonstrate that the procurement process was conducted in an open and fair manner and that CSISD received the most advantageous price.

Instructions:

1. Complete one (1) Independent Estimate Determination form **PRIOR** to either (1) advertising and receiving bids or proposals or (2) seeking quotes or proposals from other governmental entities through an interlocal contract or a purchasing cooperative, and complete all sections.
2. Provide a detailed discussion of your independent estimate and attach the required supporting information.
3. Sign in blue ink and date the form.
4. Maintain a copy in the procurement/contract file along with the cost or price analysis (as completed before contract award), subject to retention schedules.

Prepared by: _____ **Date:** _____

Email: _____ **Phone Number:** _____

Division: _____

Subject: Independent Estimate Determination

PART I SCOPE AND/OR SPECIFICATIONS

*Please attach documentation reflecting the Scope or Proposal/Work and/or Specifications.
The attached Scope of Proposal/Work and/or Specifications contains the following (check all that apply):*

For Goods/Equipment	For Services
<input type="checkbox"/> Estimated quantity of items and/or goods required	<input type="checkbox"/> List of services/responsibilities to be performed
<input type="checkbox"/> Detailed description of each item required	<input type="checkbox"/> Detailed list of deliverables/tasks required
<input type="checkbox"/> Specifications and/or drawings for materials required	<input type="checkbox"/> Anticipated contract term and start date
<input type="checkbox"/> Date items and/or goods are required	<input type="checkbox"/> Location of project
<input type="checkbox"/> Delivery address and point of contact	<input type="checkbox"/> Specifications, drawings, and/or pictures of job site or projected

	results
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PART II INDEPENDENT ESTIMATE GUIDE

Below is a guide for the completion of the Independent Estimate Determination. Please attach the documents requested under "items to include with independent estimate" to this Determination.

Estimate Type	Items to Include with Independent Estimate	Where to Find Supporting Information
Goods/Equipment	<ol style="list-style-type: none"> 1. Product needed 2. Estimated quantity 3. Unit price 4. Markups – overheads – profit 5. Desired delivery schedule 6. Warranty 	<ol style="list-style-type: none"> 1. Vendor survey/market survey 2. Current or past contracts for the same or similar product 3. Historical price and costs data
Services (other than professional services, as defined by Tex. Educ. Code § 44.031(f) and/or Tex. Gov't Code Ch. 2254)	<ol style="list-style-type: none"> 1. Tasks you want done 2. Types of people needed 3. Positions required 4. Estimated hours by position 5. Salary/billing rates applied 6. Prevailing wage rate category applied (if applicable) 7. Profit/applied fee 8. Direct expenses 9. Completion schedule 	<ol style="list-style-type: none"> 1. Current or past contracts for similar services 2. Other departments doing similar work 3. Historical price and cost data

PART III INDEPENDENT ESTIMATE

Please complete the following form.

This Independent Estimate is for: Goods/Equipment Services

Discussion of independent estimate before receiving bids or proposals including CSISD's estimated reasonable price range for the goods and/or services (attach additional explanation if necessary): _____

Goods/Equipment

Source Used to Develop Independent Estimate of Goods/Equipment (check all that apply and attach supporting documentation):

- Vendor survey/market survey
 - Current or past contracts for the same or similar product
 - Historical price and costs data
 - Other (please specify source and attach supporting documentation): _____
-
-

Services

Source Used to Develop Independent Estimate of Services (check all that apply and attach supporting documentation):

- Current or past contracts for similar services
 - Other departments doing similar work
 - Historical price and costs data
 - Other (please specify source and attach supporting documentation): _____
-
-

**PART IV
ATTACHMENT CHECKLIST**

The following required documentation is included as attachments to this Independent Estimate Determination (please check boxes to certify compliance with required documentation):

- Scope of Proposal/Work and/or Specifications (as required by Part I).**
- For goods/equipment, documentation reflecting the following (as required by Part II):**
 - Product needed
 - Estimated quantity
 - Markups-overhead-profits
 - Unit price
 - Desired delivery schedule
 - Warranty
- For services, documentation reflecting the following (as required by Part II):**
 - Tasks you want done
 - Types of people needed
 - Positions required
 - Estimated hours by position
 - Salary/billing rates applied
 - Prevailing wage rate category applied
 - Profit/applied fee
 - Direct expenses
 - Completion schedule
- Documentation reflecting the source used to develop the independent estimate (as required by Part III).**
- If applicable, additional supporting documentation (e.g., explanation of the process and/or sources used or explanation of the estimate reached). Please provide a brief explanation of the additional documents:**

**PART V
CERTIFICATIONS**

I certify that I developed this independent estimate prior to receiving bids or proposals as required by 2 C.F.R. § 200.323. I further certify that, to the best of my knowledge and belief, the information provided above and attached hereto is true and correct and that the independent estimate reflects a necessary, fair, and reasonable range of costs or prices for the future procurement.

Full Name of Individual Preparing Form

Signature

Date

APPROVED:

*Level One: Full Name of Director of Purchasing

Signature

Date

*Level Two: Full Name of Director for Program (grant)

Signature

Date

*Level Three: Full Name of Deputy Superintendent for Business

Signature

Date

* Items above \$50,000

College Station ISD (CSISD)

DETERMINATION OF COST OR PRICE ANALYSIS (REASONABLENESS)

Purpose: Federal regulations require documentation of cost analysis or price analysis for every procurement action at or above \$250,000 (see 2 C.F.R. § 200.323). The Determination of Cost or Price Reasonableness form is used to document the analysis showing that the offered price is fair and reasonable. The form is kept as part of the procurement file to demonstrate that the procurement process was conducted in an open and fair manner and that CSISD received the most advantageous price. **This form is required by the Grant Director who is responsible for grant oversight and implementation of internal controls to meet the grant requirements.**

Instructions:

1. Complete a separate Determination of Cost or Price Reasonableness form for each vendor being recommended for contract award. Complete all sections.
2. Provide a detailed discussion of your price analysis or cost analysis. A Determination of Cost or Price Reasonableness form that lacks sufficient detail cannot be approved.
3. Sign in blue ink and date the form.
4. Maintain a copy on the grant file subject to retention schedules
5. Submit completed form to the Purchasing Director prior to contract award.

An improperly completed and/or unsigned form will be returned to the Grant Director.

Prepared by: _____ Date: _____

Email: _____ Phone Number: _____

Division: _____

Subject: Determination of Cost or Price Reasonableness

Good or service to be acquired: _____

RFP #: _____

Independent Estimate Produced before Receiving Bids or Proposals: Yes (attach supporting document(s))

Vendor: _____

Amount: _____

(Attach written quotation or other information that documents the estimate of cost or price reasonableness)
(As necessary include unit costs, rates, schedules, price estimates, and budgets, etc.)

I. This expenditure is being made under one or more of the following (check those that apply and attach supporting documentation):

- A. Sole source (as defined under TEC 44.031(j))
- B. Emergency procurement (as defined under TEC 44.031(h))
- C. Interlocal agreement or purchasing cooperative (TEC 44.031(a)(4) / Tex. Gov't Code Ch. 791; 2 C.F.R. § 200.318(e))
- D. Request for Quotations for goods or services at or above \$250,000 (CSISD has a procedure of procuring and securing quotes for items under \$50,000 and above \$10,000)
- E. Request for Proposals for goods or services at or above \$250,000 (CSISD has a policy of procuring goods and services valued at \$50,000 or above in accordance with TEC 44.031(a))
- F. Request for Quotations or Requests for Proposals (where the solicitation is publically posted) where only one (1) quote/proposal is received
- G. Professional services (as defined under TEC 44.031(f) and/or Ch. 2254 of the Tex. Gov't Code)
- H. Price adjustment to Purchase Order No. _____ or Contract No. _____ and already procured under item A – G)
- I. Extension of an existing contract past its initial term. Contract extension is allowed under procurement method or contract. Extension must adhere to CH Local requirements for board approval and rationale is beneficial to HCDE.

- J. Other condition (specify):

II. Cost or price offered or fee negotiated is considered fair and reasonable for the following reason(s), and if applicable, is supported by attached documentation and/or a detailed discussion of the cost or price analysis (select at least one applicable situation):

- Comparison of previous CSISD purchase order and contract prices with current proposed price, for the same or similar items. Both the validity of the comparison and the reasonableness of the previous price(s) have been established *Attach the referenced CSISD purchase orders/contracts, amounts, issuance dates, and how they are similar to the current purchase.*
- Comparison with Vendor's published price lists, market prices, pricing indexes, and discount or rebate arrangements. *Attach published price list or other published pricing information used (a vendor's quotation or correspondence does not qualify as a published price list).*
- Comparison of proposed price with independent cost estimates. *Attach estimates used.*
- Comparison of proposed price with prices obtained through market research for the same or similar items. *Attach documentation of research conducted.*
- Analysis of Offeror's cost information. *Attach cost information.*
- The order is priced in accordance with existing CSISD Purchase Order No. _____ and/or CSISD Contract No. _____, which was competitively established.
- Other reason (specify):

CERTIFICATION:

I certify that the information provided above is true and correct to the best of my knowledge and belief. I further certify that I have determined that the costs or prices proposed are necessary, fair, and reasonable.

Full Name of Individual Preparing Form

Signature

Date

APPROVED:

*Level One: Full Name of Director of Purchasing

Signature

Date

*Level Two: Full Name of Director for Program (grant)

Signature

Date

*Level Three: Full Name of Deputy Superintendent/Chief Financial Officer

Signature

Date

* Items above \$50,000

**COLLEGE STATION INDEPENDENT SCHOOL DISTRICT
JUSTIFICATION OF SOLE SOURCE PURCHASE
QUESTIONNAIRE**

Date: _____ Requisition # _____ Vendor: _____ Amount of Purchase \$ _____

The Requesting Department must complete this questionnaire in its entirety, affirming that the product to be purchased is, to the best of its knowledge, sold exclusively by the recommended vendor and that no other **like** product exists in the market that would serve the same purpose or function. State and Federal law requires the decision to purchase sole source products be justified and documented.

- 1) Describe the purpose or function of the product being requested and identify the unique features, characteristics or specifications of the requested product.

- 2) Explain the need for the unique features, characteristics or specifications and the importance of the unique specifications related to the intended use of the product.

- 3) Provide evidence of the research that was completed, identifying other sources or competitors to this item that were evaluated including vendor names, manufacturers, model numbers, etc.

- 4) Reason why these products were found to be unsatisfactory for the intended purpose.

- 5) Is this a captive replacement part or component to be interfaced with an existing item? If yes, explain why and provide brand and model number of existing item.

- 6) Will this purchase obligate CSISD to particular vendor/product for future purchases either in terms of maintenance or more 'like' items or services in the future to match this one?

Name of Requestor: _____ Position: _____

Department: _____ Email: _____ Phone: _____

I hereby certify that the above request and justification is accurate and complete to the best of my knowledge and belief.

Signature of Director/Principal: _____ Date: _____



Grants Administration Division Request for Noncompetitive Procurement (Sole-Source) Approval

Complete and submit this form to request prior approval for a noncompetitive, sole-source proposal. Limit one proposal per form.
Completion and submission of this form satisfies the requirement in 2 CFR 200.320(f).

Name of Federal Grant

Name of Grantee County-District # Date

Description of Request

Describe the proposal, and explain the rationale for making it noncompetitive.

Do you have a sole-source verification letter from the proposed vendor? Yes No

How many vendors have been contacted for price quotes that led you to determine that there is only a sole source?

List the vendors contacted:

Provide a reason that this procurement is a noncompetitive or sole-source procurement.

TEA APPROVAL REQUIRED AS OF 2018 FOR ANY FEDERAL PURCHASE CLAIMING TO BE SOLE SOURCE.

Certification

Name and Title of Authorized Official

Signature of Authorized Official Date

This form must be signed by the authorized official.

Email this signed form to TEA's chief grants administrator at grants@tea.texas.gov.

For TEA Use

Request for prior written approval is approved as requested.

Request for prior written approval is approved with the following changes:

Request for prior written approval is denied.

Signature of Chief Grants Administrator Date

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

FORM CIQ

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.

2 **Check this box if you are filing an update to a previously filed questionnaire.** (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

Yes No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

Yes No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

Signature of vendor doing business with the governmental entity

Date

CONFLICT OF INTEREST QUESTIONNAIRE

For vendor doing business with local governmental entity

A complete copy of Chapter 176 of the Local Government Code may be found at <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>. For easy reference, below are some of the sections cited on this form.

Local Government Code § 176.001(1-a): "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

- (A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;
- (B) a transaction conducted at a price and subject to terms available to the public; or
- (C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

Local Government Code § 176.003(a)(2)(A) and (B):

(a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

(2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that

- (i) a contract between the local governmental entity and vendor has been executed;
- or
- (ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than \$100 in the 12-month period preceding the date the officer becomes aware that:

- (i) a contract between the local governmental entity and vendor has been executed; or
- (ii) the local governmental entity is considering entering into a contract with the vendor.

Local Government Code § 176.006(a) and (a-1)

(a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

- (1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);
- (2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or
- (3) has a family relationship with a local government officer of that local governmental entity.

(a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

(1) the date that the vendor:

- (A) begins discussions or negotiations to enter into a contract with the local governmental entity; or
- (B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

(2) the date the vendor becomes aware:

- (A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);
- (B) that the vendor has given one or more gifts described by Subsection (a); or
- (C) of a family relationship with a local government officer.

EDGAR CERTIFICATIONS
ADDENDUM FOR CONTRACT FUNDED BY U.S. FEDERAL GRANT

The following certifications and provisions are required and apply when the College Station ISD expends federal funds for any contract resulting from this procurement process. Accordingly, the parties agree that the following terms and conditions apply to the Contract between College Station ISD and Vendor in all situations where Vendor has been paid or will be paid with federal funds:

REQUIRED CONTRACT PROVISIONS FOR NON-FEDERAL ENTITY CONTRACTS UNDER FEDERAL AWARDS
APPENDIX II TO 2 CFR PART 200

(A) Contracts for more than the simplified acquisition threshold currently set at \$250,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

Pursuant to Federal Rule (A) above, when College Station ISD expends federal funds, College Station ISD reserves all rights and privileges under the applicable laws and regulations with respect to this procurement in the event of breach of contract by either party.

Does Vendor agree? YES _____ Initials of Authorized Representative of Vendor

(B) Termination for cause and for convenience by the grantee or subgrantee including the manner by which it will be effected and the basis for settlement. (All contracts in excess of \$10,000)

Pursuant to Federal Rule (B) above, when College Station ISD expends federal funds, College Station ISD reserves the right to immediately terminate any agreement in excess of \$10,000 resulting from this procurement process in the event of a breach or default of the agreement by Vendor in the event Vendor fails to: (1) meet schedules, deadlines, and/or delivery dates within the time specified in the procurement solicitation, contract, and/or a purchase order; (2) make any payments owed; or (3) otherwise perform in accordance with the contract and/or the procurement solicitation. College Station ISD also reserves the right to terminate the contract immediately, with written notice to vendor, for convenience, if College Station ISD believes, in its sole discretion that it is in the best interest of College Station ISD to do so. Vendor will be compensated for work performed and accepted and goods accepted by College Station ISD as of the termination date if the contract is terminated for convenience of College Station ISD. Any award under this procurement process is not exclusive and College Station ISD reserves the right to purchase goods and services from other vendors when it is in the College Station ISD's best interest.

Does Vendor agree? YES _____ Initials of Authorized Representative of Vendor

(C) Equal Employment Opportunity. Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."

Pursuant to Federal Rule (C) above, when the College Station ISD expends federal funds on any federally assisted construction contract, the equal opportunity clause is incorporated by reference herein.

Does Vendor agree to abide by the above? YES _____ Initials of Authorized Representative of Vendor

(D) Davis-Bacon Act, as amended (40 U.S.C. 3141-3148). When required by Federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted

Construction"). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency.

Pursuant to Federal Rule (D) above, when College Station ISD expends federal funds during the term of an award for all contracts and subgrants for construction or repair, Vendor will be in compliance with all applicable Davis-Bacon Act provisions.

Does Vendor agree? YES _____ Initials of Authorized Representative of Vendor

(E) Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708). Where applicable, all contracts awarded by the non-Federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

Pursuant to Federal Rule (E) above, when College Station ISD expends federal funds, Vendor certifies that Vendor will be in compliance with all applicable provisions of the Contract Work Hours and Safety Standards Act during the term of an award for all contracts by College Station ISD resulting from this procurement process.

Does Vendor agree? YES _____ Initials of Authorized Representative of Vendor

(F) Rights to Inventions Made Under a Contract or Agreement. If the Federal award meets the definition of "funding agreement" under 37 CFR §401.2 (a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement," the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.

Pursuant to Federal Rule (F) above, when federal funds are expended by College Station ISD, Vendor certifies that during the term of an award for all contracts by College Station ISD resulting from this procurement process, Vendor agrees to comply with all applicable requirements as referenced in Federal Rule (F) above.

Does Vendor agree? YES _____ Initials of Authorized Representative of Vendor

(G) Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended—Contracts and subgrants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251- 1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

Pursuant to Federal Rule (G) above, when federal funds are expended by College Station ISD, Vendor certifies that

during the term of an award for all contracts by College Station ISD resulting from this procurement process, Vendor agrees to comply with all applicable requirements as referenced in Federal Rule (G) above.

Does Vendor agree? YES _____ Initials of Authorized Representative of Vendor

(H) Debarment and Suspension (Executive Orders 12549 and 12689)—A contract award (see 2 CFR 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

Pursuant to Federal Rule (H) above, when federal funds are expended by College Station ISD, Vendor certifies that during the term of an award for all contracts by College Station ISD resulting from this procurement process, Vendor certifies that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.

Does Vendor agree? YES _____ Initials of Authorized Representative of Vendor

(I) Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)—Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.

Pursuant to Federal Rule (I) above, when federal funds are expended by College Station ISD, Vendor certifies that during the term and after the awarded term of an award for all contracts by College Station ISD resulting from this procurement process, the vendor certifies that it is in compliance with all applicable provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352). The undersigned further certifies that:

- (1) No Federal appropriated funds have been paid or will be paid for on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of congress, or an employee of a Member of Congress in connection with the awarding of a Federal contract, the making of a Federal grant, the making of a Federal loan, the entering into a cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement.
- (2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions.
- (3) The undersigned shall require that the language of this certification be included in the award documents for all covered sub-awards exceeding \$100,000 in Federal funds at all appropriate tiers and that all subrecipients shall certify and disclose accordingly.

Does Vendor agree? YES _____ Initials of Authorized Representative of Vendor

(J) Procurement of Recovered Materials – When federal funds are expended, College Station ISD and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include: (1) procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; (2) procuring solid waste management services in a manner that maximizes energy

and resource recovery; and (3) establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Pursuant to Federal Rule (J) above, when federal funds are expended by College Station ISD, as required by the Resource Conservation and Recovery Act of 1976 (42 U.S.C. § 6962(c)(3)(A)(i)), the vendor certifies, by signing this document, that the percentage of recovered materials content for EPA-designated items to be delivered or used in the performance of the contract will be at least the amount required by the applicable contract specifications or other contractual requirements.

Does Vendor agree? YES _____ Initials of Authorized Representative of Vendor

(K) When federal funds are expended by College Station ISD, Vendor is required to take all affirmative steps set forth in 2 CFR 200.321 to solicit and reach out to small, minority and women owned firms for any subcontracting opportunities on the project, including:

- 1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists;
- 2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;
- 3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;
- 4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises; and
- 5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce.

Does Vendor agree? YES _____ Initials of Authorized Representative of Vendor

RECORD RETENTION REQUIREMENTS FOR CONTRACTS INVOLVING FEDERAL FUNDS

When federal funds are expended by College Station ISD for any contract resulting from this procurement process, Vendor certifies that it will comply with the record retention requirements detailed in 2 CFR § 200.333. Vendor further certifies that it will retain all records as required by 2 CFR § 200.333 for a period of three years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

Does Vendor agree? YES _____ Initials of Authorized Representative of Vendor

CERTIFICATION OF COMPLIANCE WITH THE ENERGY POLICY AND CONSERVATION ACT

When College Station ISD expends federal funds for any contract resulting from this procurement process, Vendor certifies that it will comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (42 U.S.C. 6321 et seq.; 49 C.F.R. Part 18).

Does Vendor agree? YES _____ Initials of Authorized Representative of Vendor

CERTIFICATION OF EQUAL EMPLOYMENT STATEMENT

It is the policy of College Station ISD not to discriminate on the basis of race, color, national origin, gender, limited English proficiency or handicapping conditions in its programs. Vendor agrees not to discriminate against any employee or applicant for employment to be employed in the performance of this Contract, with respect to hire, tenure, terms, conditions and privileges of employment, or a matter directly or indirectly related to employment, because of age (except where based on a bona fide occupational qualification), sex (except where based on a bona fide occupational qualification) or race, color, religion, national origin, or ancestry. Vendor further agrees that every subcontract entered into for the performance of this Contract shall contain a provision requiring non-discrimination in employment herein specified, binding upon each subcontractor. Breach of this covenant may be regarded as a material breach of the Contract.

Does Vendor agree? YES _____ Initials of Authorized Representative of Vendor

CERTIFICATION OF COMPLIANCE WITH BUY AMERICA PROVISIONS

College Station ISD has a preference for domestic end products for supplies acquired for use in the United States when spending federal funds (purchases that are made with non-federal funds or grants are excluded from the Buy America Act). Vendor certifies that it is in compliance with all applicable provisions of the Buy America Act.

Does Vendor agree? **YES _____** Initials of Authorized Representative of Vendor

CERTIFICATION OF ACCESS TO RECORDS – 2 C.F.R. § 200.336

Vendor agrees that College Station ISD's Inspector General, FEMA Administrator, the Comptroller General of the United States, or any of their duly authorized representatives shall have access to any books, documents, papers and records of Vendor, and its successors, transferees, assignees, and subcontractors that are directly pertinent to the Contract for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to Vendor's personnel for the purpose of interview and discussion relating to such documents. Vendor agrees to permit any of the foregoing parties to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed. Vendor agrees to provide the FEMA Administrator or his authorized representatives access to construction or other work sites pertaining to the work being completed under the Contract.

Does Vendor agree? **YES _____** Initials of Authorized Representative of Vendor

CERTIFICATION OF APPLICABILITY TO SUBCONTRACTORS

Vendor agrees that all contracts it awards pursuant to the Contract shall be bound by the foregoing terms and conditions.

Does Vendor agree? **YES _____** Initials of Authorized Representative of Vendor

CERTIFICATION OF DHS SEAL, LOGO AND FLAGS

Vendor agrees that it shall not use the DHS seal(s), logos, crests, or reproductions of flags or likeness of DHS agency officials without specific FEMA pre-approval.

Does Vendor agree? **YES _____** Initials of Authorized Representative of Vendor

CERTIFICATION REGARDING COMPLIANCE WITH FEDERAL LAW, REGULATIONS, AND EXECUTIVE ORDERS

Vendor agrees that FEMA financial assistance will be used to fund the Contract only. The Vendor will comply with all applicable federal law, regulations, executive orders, FEMA policies, procedures, and directives.

Does Vendor agree? **YES _____** Initials of Authorized Representative of Vendor

CERTIFICATION OF NO OBLIGATION BY FEDERAL GOVERNMENT

Vendor agrees that the Federal Government is not a party to this Contract and is not subject to any obligations or liabilities to the non-Federal Entity, Vendor, or any other party pertaining to any matter resulting from the Contract.

Does Vendor agree? **YES _____** Initials of Authorized Representative of Vendor

CERTIFICATION REGARDING FRAUD AND FALSE OR FRADULENT STATEMENTS OR RELATED ACTS

Vendor agrees that 31 U.S.C. Chap. 38 (Administrative Remedies for False Claims and Statements) applies to the Vendor's actions pertaining to this Contract.

Does Vendor agree? **YES _____** Initials of Authorized Representative of Vendor

CERTIFICATION REGARDING CHANGES

Vendor agrees that in the event of any changes or modifications to the method, price, or schedule of the work, the cost of such changes will be reasonable, allowable, and within the scope of the grant.

Does Vendor agree? **YES** _____ Initials of Authorized Representative of Vendor _____

VENDOR AGREES TO COMPLY WITH ALL APPLICABLE FEDERAL, STATE, AND LOCAL LAWS, RULES, REGULATIONS, AND ORDINANCES. IT IS FURTHER ACKNOWLEDGED THAT VENDOR CERTIFIES COMPLIANCE WITH ALL PROVISIONS, LAWS, ACTS, REGULATIONS, ETC. AS SPECIFICALLY NOTED ABOVE.

Vendor's Name: _____

Address, City, State, and Zip Code: _____

Phone Number: _____ Fax Number: _____

Printed Name and Title of Authorized Representative: _____

Email Address: _____

Signature of Authorized Representative: _____

Date: _____

COLLEGE STATION I.S.D.

FELONY CONVICTION NOTICE

Statutory citation covering notification of criminal history of vendor is found in the Texas Education Code §44.034.

Felony Conviction Notification

Texas Education Code §44.034, Notification of Criminal History, Subsection (a), states “ a person or business entity that enters into a contract with a school district must give advance notice to the district if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony.” Subsection (b) states “ a school district may terminate a contract with a person or business entity failed to give notice as required by subsection (a) or misrepresented the conduct resulting in the conviction. The school district must compensate the person or business entity for services performed before the termination of the contract.”

This Notice is NOT required of a Publicly-Held Corporation.

I, the undersigned agent for the firm named below, certify that the information concerning notification of felony convictions has been reviewed by me and the following information furnished is true to the best of my knowledge.

Vendor’s Name: _____

Authorized Company Official’s Name (Printed)

- A. My firm is a publicly held corporation; therefore, this reporting requirement is not applicable.

Signature of Company Official

- B. My firm is not owned nor operated by anyone who has been convicted of a felony:

Signature of Company Official

- C. My firm is owned or operated by the following individual(s) who has/have been convicted of a felony:

Name of Felon (s): _____

Details of Conviction(s): _____

Signature of Company Official

Certification Regarding Terrorist Organizations and Boycott of Israel

[Govt Code 808 (HB89) and Govt Code 2252 (SB252)]

Contractor hereby certifies that it is not a company identified on the Texas Comptroller’s list of companies known to have contracts with, or provide supplies or services to Iran, Sudan or a foreign organization designated as a Foreign Terrorist Organization by the U.S. Secretary of State under federal law.

Contractor hereby certifies and verifies that neither Contractor, nor any affiliate, subsidiary, or parent company of Contractor, if any (the “Contractor Companies”), boycotts Israel, and contractor agrees that Contractor and Contractor Companies will not boycott Israel during the term of this Agreement. For purposes of this Agreement, the term “boycott” shall mean and include terminating business activities or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory.

Vendor’s Name: _____

Address, City, State, and Zip Code:

Phone Number: _____ Fax Number: _____

Printed Name and Title of Authorized Representative:

Email Address:

Signature of Authorized Representative:

Date: _____

SB 13 and SB 19 Certification

CERTIFICATION REGARDING BOYCOTTING CERTAIN ENERGY COMPANIES If (a) Provider is not a sole proprietorship; (b) Provider has ten (10) or more full-time employees; and (c) this Contract has a value of \$100,000 or more that is to be paid wholly or partly from public funds, the following certification shall apply; otherwise, this certification is not required. Pursuant to TEX. GOV'T CODE Ch. 2274 of SB 13 (87th session), the Provider hereby certifies and verifies that the Provider, or any wholly owned subsidiary, majority-owned subsidiary, parent company, or affiliate of these entities or business associations, if any, does not boycott energy companies and will not boycott energy companies during the term of the Contract. For purposes of this Addendum, the term "company" shall mean an organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or limited liability company, which exists to make a profit. The term "boycott energy company" shall mean "without an ordinary business purpose, refusing to deal with, terminating business activities with, or otherwise taking any action intended to penalize, inflict economic harm on, or limit commercial relations with a company because the company (a) engages in the exploration, production, utilization, transportation, sale, or manufacturing of fossil fuel-based energy and does not commit or pledge to meet environmental standards beyond applicable federal and state law, or (b) does business with a company described by paragraph (a)." See TEX. GOV'T CODE § 809.001(1).

CERTIFICATION PROHIBITING DISCRIMINATION AGAINST FIREARM AND AMMUNITION INDUSTRIES If (a) Provider is not a sole proprietorship; (b) Provider has at least ten (10) full-time employees; (c) this Contract has a value of at least \$100,000 that is paid wholly or partly from public funds; (d) the Contract is not excepted under TEX. GOV'T CODE § 2274.003 of SB 19 (87th leg.); and (e) governmental entity has determined that Provider is not a sole-source provider or CSISD has not received any bids from a company that is able to provide this written verification, the following certification shall apply; otherwise, this certification is not required. Pursuant to TEX. GOV'T CODE Ch. 2274 of SB 19 (87th session), the Provider hereby certifies and verifies that the Provider, or association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or limited liability company, including a wholly owned subsidiary, majority-owned subsidiary parent company, or affiliate of these entities or associations, that exists to make a profit, does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association and will not discriminate during the term of this Agreement against a firearm entity or firearm trade association. For purposes of this Contract, "discriminate against a firearm entity or firearm trade association" shall mean, with respect to the entity or association, to: "(1) refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm entity or firearm trade association; (2) refrain from continuing an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association; or (3) terminate an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association. See TEX. GOV'T CODE § 2274.001(3) of SB 19. "Discrimination against a firearm entity or firearm trade association" does not include: "(1) the established policies of a merchant, retail seller, or platform that restrict or prohibit the listing or selling of ammunition, firearms, or firearm accessories; and (2) a company's refusal to engage in the trade of any goods or services, decision to refrain from continuing an existing business relationship, or decision to terminate an existing business relationship to comply with federal, state, or local law, policy, or regulations or a directive by a regulatory agency, or for any traditional business reason that is specific to the customer or potential customer and not based solely on an entity's or association's status as a firearm entity or firearm trade association." See TEX. GOV'T CODE §2274.001(3) of SB 19.

CERTIFICATION REGARDING CERTAIN FOREIGN-OWNED COMPANIES IN CONNECTION WITH CRITICAL INFRASTRUCTURE CSISD is prohibited from entering into a contract or other agreement relating to critical infrastructure that would grant to the Provider direct or remote access to or control of critical infrastructure in this state, excluding access specifically allowed by the CSISD for product warranty and support purposes. Provider, certifies that neither it nor its parent company nor any affiliate of Provider or its parent company, is (1) owned by or the majority of stock or other ownership interest of the company is held or controlled by individuals who are citizens of China, Iran, North Korea, Russia, or a designated country; (2) a company or other entity, including governmental entity, that is owned or controlled by citizens of or is directly controlled by the government of China, Iran, North Korea, Russia, or a designated country; or (3) headquartered in China, Iran, North Korea, Russia, or a designated country. For purposes of this Addendum, "critical infrastructure" means "a communication infrastructure system, cybersecurity system, electric grid, hazardous waste treatment system, or water treatment facility." See TEX. GOV'T CODE § 2274.0101(2) of SB 1226 (87th leg.). The Provider verifies and certifies that Provider will not grant direct or remote access to or control of critical infrastructure, except for product warranty and support purposes, to prohibited individuals, companies, or entities, including governmental entities, owned, controlled, or headquartered in China, Iran, North Korea, Russia, or a designated country, as determined by the Governor.

Contractor hereby certifies and verifies that Contractor, or any affiliate, subsidiary, or parent company of Contractor, if any (the "Contractor Companies"), will comply with the above certifications' during the terms of this Agreement.

Offeror's Name: _____

Name and Title of Authorized Company Official _____

Signature of Authorized Company Official _____ Date _____

COLLEGE STATION INDEPENDENT SCHOOL DISTRICT

PURCHASE REQUEST

THIS FORM MUST BE COMPLETED BEFORE A PURCHASE OVER \$50,000 CAN BE PLACED ON THE CSISD BOARD AGENDA

To: Purchasing Department

Date: _____

Description of Purchase:

Board Meeting Date Requested: _____

Requested Method of Procurement:

Request for Bids Request for Proposals DIR Quote
 Cooperative Purchase Contract # _____ Interlocal Agreement Sole Source

Documents Attached: _____

Delivery Date Requested: _____ Please allow time for 4-weeks for bidding by the Purchasing Department if not using an existing awarded bid or purchasing cooperative contract.

Suggested Source: _____

Funds Allocated for this purchase \$ _____ **Type of Funds** _____

Account to be used for this purchase:

ITEM	BUDGET CODE	ACCOUNT	AMOUNT
------	-------------	---------	--------

Originator Signature: _____ **Date:** _____

Director: _____ **Date:** _____

Fund Balance Verified By: _____ **Date:** _____

**CERTIFICATION FOR USE OF PURCHASING COOPERATIVE FOR THE
PURCHASE OF
CONSTRUCTION-RELATED GOODS OR SERVICES**

Gov't Code 791.025(b)–(c); Atty. Gen. Op. JC-37 (1999)

The District may not enter into a contract to purchase construction-related goods or services through a purchasing cooperative in an amount greater than \$50,000 unless a person designated by the District certifies in writing that:

___ The project for which the construction-related goods or services are being procured does not require the preparation of plans and specifications under Chapter 1001 or 1051, Occupations Code; or

___ The plans and specifications required under Chapters 1001 and 1051, Occupations Code, have been prepared.

Project: _____

Signature: _____

Title: _____

Date: _____

CERTIFICATE OF INTERESTED PARTIES

Per House Bill 1295, Section 2252.908 of the Government Code, the district may not enter into certain contracts with a business entity unless the business entity submits a disclosure of interested parties to the governmental entity or state agency at the time the business entity submits the signed contract to the governmental entity or state agency.

CERTIFICATE OF INTERESTED PARTIES		FORM 1295	
Complete Nos. 1 - 4 and 6 if there are interested parties. Complete Nos. 1, 2, 3, 5, and 6 if there are no interested parties.		OFFICE USE ONLY	
1 Name of business entity filing form, and the city, state and country of the business entity's place of business.			
2 Name of governmental entity or state agency that is a party to the contract for which the form is being filed.			
3 Provide the identification number used by the governmental entity or state agency to track or identify the contract, and provide a description of the goods or services to be provided under the contract.			
4		Nature of Interest (check applicable)	
Name of Interested Party	City, State, Country (place of business)	Controlling	Intermediary
5 Check only if there is NO Interested Party.			
6 AFFIDAVIT		I swear, or affirm, under penalty of perjury, that the above disclosure is true and correct.	
Signature of authorized agent of contracting business entity		<input type="checkbox"/> _____	
AFFIX NOTARY STAMP / SEAL ABOVE			
Sworn to and subscribed before me, by the said _____, this the _____ day of _____, 20_____, to certify which, witness my hand and seal of office.			
_____ Signature of officer administering oath		_____ Printed name of officer administering oath	
		_____ Title of officer administering oath	
ADD ADDITIONAL PAGES AS NECESSARY			

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BOARD POLICY

LEGAL & LOCAL

PURCHASING AND ACQUISITION (CH)

and

**EQUIPMENT AND SUPPLIES MANAGEMENT
INSTRUCTIONAL MATERIALS CARE AND
ACCOUNTING (CMD)**

PURCHASING AND ACQUISITION

CH
(LEGAL)

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Note: For legal requirements applicable to purchases with federal funds, see CBB.

For required vendor disclosures and contract provisions, including prohibitions, see CHE.

For provisions pertaining to criminal history record information on contractors, see CJA.

For legal requirements related to energy savings performance contracts, see CL.

For information on procuring school buses, see CNB.

For legal requirements applicable to school nutrition procurement, including produce, with federal funds, see COA.

For information regarding construction of school facilities, see CV series.

Board Authority

The board may adopt rules and procedures for the acquisition of goods and services. *Education Code 44.031(d)*

Delegation of
Authority

The board may, as appropriate, delegate its authority regarding an action authorized or required by Education Code Chapter 44, Subchapter B, to be taken by a district to a designated person, representative, or committee.

The board may not delegate the authority to act regarding an action authorized or required to be taken by the board by Education Code Chapter 44, Subchapter B.

*Disaster
Delegation*

Notwithstanding any other provision of the Education Code, in the event of a catastrophe, emergency, or natural disaster affecting a district, the board may delegate to the superintendent or designated person the authority to contract for the replacement, construction, or repair of school equipment or facilities under Education Code Chapter 44, Subchapter B if emergency replacement, construction, or repair is necessary for the health and safety of district students and staff.

Education Code 44.0312

**Purchases Valued at
or Above \$50,000**

Methods

Except as provided by Education Code Chapter 44, Subchapter B, all district contracts for the purchase of goods and services, except contracts for the purchase of produce or vehicle fuel, valued at \$50,000 or more in the aggregate for each 12-month period, shall be made by the method, of the following methods, that provides the best value for a district:

PURCHASING AND ACQUISITION

CH
(LEGAL)

1. Competitive bidding for services other than construction services.
2. Competitive sealed proposals for services other than construction services.
3. A request for proposals for services other than construction services.
4. An interlocal contract.
5. A method provided by Government Code Chapter 2269 for construction services [see CV series];
6. The reverse auction procedure as defined by Government Code 2155.062(d).
7. The formation of a political subdivision corporation under Local Government Code 304.001 (purchase of electricity).

Education Code 44.031(a)

Exceptions

Emergency
Damage or
Destruction

If school equipment, a school facility, or a part of a school facility or personal property is destroyed or severely damaged or, as a result of an unforeseen catastrophe or emergency, undergoes major operational or structural failure, and the board determines that the delay posed by the methods provided for in Education Code 44.031 would prevent or substantially impair the conduct of classes or other essential school activities, then contracts for the replacement or repair of the equipment, school facility, or the part of the school facility may be made by methods other than those required by Education Code 44.031. *Education Code 44.031(h)*

Sole Source

Without complying with Education Code 44.031(a) above, a district may purchase an item that is available from only one source, including:

1. An item for which competition is precluded because of the existence of a patent, copyright, secret process, or monopoly.
2. A film, manuscript, or book.
3. A utility service, including electricity, gas, or water.
4. A captive replacement part or component for equipment.

The exceptions above do not apply to mainframe data-processing equipment and peripheral attachments with a single-item purchase price in excess of \$15,000.

Education Code 44.031(j)–(k)

Competitive Bidding

Except to the extent prohibited by other law and to the extent consistent with Education Code Chapter 44, Subchapter B, a district may use competitive bidding to select a vendor as authorized by Education Code 44.031(a)(1).

A district shall award a competitively bid contract at the bid amount to the bidder offering the best value for the district. In determining the best value for the district, the district is not restricted to considering price alone but may consider any other factors stated in the selection criteria. The selection criteria may include the factors listed in Education Code 44.031(b) [see Contract Selection Factors, below].

Except as provided below, Local Government Code Chapter 271, Subchapter B (Competitive Bidding on Certain Public Works Contracts) does not apply to a competitive bidding process under this policy.

Local Government Code Sections 271.026 (Opening of Bids), 271.027(a) (Award of Contract), and 271.0275 (Safety Record of Bidder Considered) apply to a competitive bidding process under Education Code Chapter 44, Subchapter B. [See CVA for these requirements.]

Education Code 44.0351

[For information on additional competitive procedures under the Public Property Finance Act, see CHH.]

Competitive Sealed Proposals

In selecting a vendor through competitive sealed proposals as authorized by Education Code 44.031(a)(2), a district shall follow the procedures prescribed below.

Request for Proposals

The district shall prepare a request for competitive sealed proposals that includes information that vendors may require to respond to the request. The district shall state in the request for proposals the selection criteria that will be used in selecting the successful offeror.

Opening Proposals

The district shall receive, publicly open, and read aloud the names of the offerors and, if any are required to be stated, all prices stated in each proposal. Not later than the 45th day after the date on which the proposals are opened, the district shall evaluate and rank each proposal submitted in relation to the published selection criteria.

Selection

The district shall select the offeror that offers the best value for the district based on the published selection criteria and on its ranking evaluation. The district shall first attempt to negotiate a contract with the selected offeror. The district may discuss with the selected

offeror options for a scope or time modification and any price change associated with the modification. If the district is unable to negotiate a satisfactory contract with the selected offeror, the district shall, formally and in writing, end negotiations with that offeror and proceed to the next offeror in the order of the selection ranking until a contract is reached or all proposals are rejected.

In determining the best value for the district, the district is not restricted to considering price alone but may consider any other factors stated in the selection criteria.

Education Code 44.0352

*Interlocal
Contracts*

“Interlocal contract” means a contract or agreement made under Government Code Chapter 791 (Interlocal Cooperation Act). A district may contract or agree with another local government or a federally recognized Indian tribe, as listed by the U.S. secretary of the interior under 25 U.S.C. 479a-1, whose reservation is located within the boundaries of this state to perform governmental functions and services in accordance with Government Code Chapter 791. A district may agree with another local government and with the state or a state agency, including the comptroller, to purchase goods and services. *Gov’t Code 791.003(2), .011(a), .025(a)*

An interlocal contract must:

1. Be authorized by the governing body of each party to the contract;
2. State the purpose, terms, rights, and duties of the contracting parties; and
3. Specify that each party paying for the performance of governmental functions or services must make those payments from current revenues available to the paying party.

An interlocal contractual payment must be in an amount that fairly compensates the performing party for the services or functions performed under the contract. An interlocal contract may be renewed. Notwithstanding item 2 above, an interlocal contract may have a specified term of years.

Gov’t Code 791.011(d)–(f), (i)

A district may agree with another local government, including a nonprofit corporation that is created and operated to provide one or more governmental functions and services, or with the state or a state agency, including the comptroller, to purchase goods and any services reasonably required for the installation, operation, or

maintenance of the goods. This provision does not apply to services provided by firefighters, police officers, or emergency medical personnel. *Gov't Code 791.025(b)*

A district that purchases goods and services under Government Code 791.025 satisfies the requirement to seek competitive bids for the purchase of the goods and services. *Gov't Code 791.025(c); Atty. Gen. Op. JC-37 (1999)*

Reverse Auction

A district that uses the reverse auction procedure must include in the procedure a notice provision and other provisions necessary to produce a method of purchasing that is advantageous to the district and fair to vendors. *Local Gov't Code 271.906(b)*

"Reverse auction procedure" means:

1. A real-time bidding process usually lasting less than one hour and taking place at a previously scheduled time and internet location, in which multiple suppliers, anonymous to each other, submit bids to provide the designated goods or services; or
2. A bidding process usually lasting less than two weeks and taking place during a previously scheduled period and at a previously scheduled internet location, in which multiple suppliers, anonymous to each other, submit bids to provide the designated goods or services.

Gov't Code 2155.062(d)

Site-Based
Purchasing

If a purchase is made at the campus level in a district with a student enrollment of 180,000 or more that has formally adopted a site-based decision-making plan under Education Code Subchapter F, Chapter 11 [see BQ series], that delegates purchasing decisions to the campus level, Education Code 44.031 applies only to the campus and does not require the district to aggregate and jointly award purchasing contracts. A district that adopts site-based purchasing under this provision shall adopt a policy to ensure that campus purchases achieve the best value to the district and are not intended or used to avoid the requirement that a district aggregate purchases under Education Code 44.031(a). *Education Code 44.031(m)*

**Contract Selection
Factors**

Except as provided by Education Code Chapter 44, Subchapter B, in determining to whom to award a contract, the district shall consider:

1. The purchase price.

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2. The reputation of the vendor and of the vendor's goods or services.
3. The quality of the vendor's goods or services.
4. The extent to which the goods or services meet the district's needs.
5. The vendor's past relationship with the district.
6. The impact on the ability of the district to comply with laws and rules relating to historically underutilized businesses.
7. The total long-term cost to the district to acquire the vendor's goods or services.
8. For a contract for goods and services, other than goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, whether the vendor or the vendor's ultimate parent company or majority owner has its principal place of business in this state or employs at least 500 persons in this state.
9. Any other relevant factor specifically listed in the request for bids or proposals.

Education Code 44.031(b)

In awarding a contract by competitive sealed bid under Education Code 44.031, a district that has its central administrative office located in a municipality with a population of less than 250,000 may consider a bidder's principal place of business in the manner provided by Local Government Code 271.9051. This provision does not apply to the purchase of telecommunications services or information services, as those terms are defined by 47 U.S.C. Section 153. *Education Code 44.031(b-1)*

The factors listed above are the only criteria that may be considered by a district in its decision to award a contract. *R.G.V. Vending v. Weslaco Indep. Sch. Dist., 995 S.W.2d 897 (Tex. App.—Corpus Christi 1999, no pet.)*

Preferences
*Agricultural
Products*

A district that purchases agricultural products shall give preference to those produced, processed, or grown in Texas if the cost to the district is equal and the quality is equal. If agricultural products produced, processed, or grown in Texas are not equal in cost and quality to other products, the district shall give preference to agricultural products produced, processed, or grown in other states of the United States, if the cost and quality of the U.S. and foreign products are equal.

“Agricultural products” includes textiles and other similar products.

“Processed” means canning, freezing, drying, juicing, preserving, or any other act that changes the form of a good from its natural state to another form.

A district may not adopt product purchasing specifications that unnecessarily exclude agricultural products produced, processed, or grown in Texas.

Vegetation for
Landscaping

A district that purchases vegetation for landscaping purposes, including plants, shall give preference to Texas vegetation if the cost to the district is equal and the quality is equal.

Education Code 44.042

[For legal requirements applicable to school nutrition procurement, including produce and agricultural products, with federal funds, see COA.]

*Recycled
Products*

A district shall give preference in purchasing to products made of recycled materials if the products meet applicable specifications as to quantity and quality and the average price of the product is not more than ten percent greater than the price of comparable nonrecycled products. Preferences will be applied in accordance with state procurement statutes and rules. *30 TAC 328.203*

Subchapter K of 30 Administrative Code (Governmental Entity Recycling and Purchasing of Recycled Materials) does not apply to a district with a student enrollment of less than 10,000 students. *30 TAC 328.204(a)*

A district regularly shall review and revise its procurement procedures and specifications for the purchase of goods, supplies, equipment, and materials in order to:

1. Eliminate procedures and specifications that explicitly discriminate against products made of recycled materials;
2. Encourage the use of products made of recycled materials; and
3. Ensure to the maximum extent economically feasible that the district purchases products that may be recycled when they have served their intended use.

In developing new procedures and specifications, the district shall encourage the use of recycled products and products that may be recycled or reused.

Health and Safety Code 361.426(b)–(c)

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*Bidder's Place of
Business*

In awarding a contract by competitive sealed bid under Education Code 44.031, a district that has its central administrative office located in a municipality with a population of less than 250,000 may consider a bidder's principal place of business in the manner provided by Local Government Code Section 271.9051. This provision does not apply to the purchase of telecommunications services or information services, as those terms are defined by 47 U.S.C. 153. *Education Code 44.031(b-1)*

Notice Publication

Notice of the time by when and place where the bids or proposals, or the responses to a request for qualifications, will be received and opened shall be published in the county in which the district's central administrative office is located, once a week for at least two weeks before the deadline for receiving bids, proposals, or responses to a request for qualifications. If there is not a newspaper in that county, the advertising shall be published in a newspaper in the county nearest the county seat of the county in which a district's central administrative office is located. In a two-step procurement process, the time and place where the second-step bids, proposals, or responses will be received are not required to be published separately. *Education Code 44.031(g)*

**Electronic Bids or
Proposals**

A district may receive bids or proposals under Education Code Chapter 44 through electronic transmission if the board adopts rules to ensure the identification, security, and confidentiality of electronic bids or proposals and to ensure that the electronic bids or proposals remain effectively unopened until the proper time.

Notwithstanding any other provision of Education Code Chapter 44, an electronic bid or proposal is not required to be sealed. A provision of Education Code Chapter 44 that applies to a sealed bid or proposal applies to a bid or proposal received through electronic transmission in accordance with the rules adopted by the board.

Education Code 44.0313

Right to Work

While a district is engaged in procuring goods and services or awarding a contract, or overseeing procurement or construction for a public work or public improvement, a district:

1. May not consider whether a vendor is a member of or has another relationship with any organization; and
2. Shall ensure that its bid specifications and any subsequent contract or other agreement do not deny or diminish the right of a person to work because of the person's membership or other relationship status with respect to any organization.

Education Code 44.043

**Contract with Person
Indebted to District**

The board by resolution may establish regulations permitting the district to refuse to enter into a contract or other transaction with a person indebted to the district. It is not a violation of Education Code Chapter 44, Subchapter B (Purchases; Contracts) for a district, under regulations adopted under this provision, to refuse to award a contract to or enter into a transaction with an apparent low bidder or successful proposer that is indebted to the district.

“Person” includes an individual, sole proprietorship, corporation, nonprofit corporation, partnership, joint venture, limited liability company, and any other entity that proposes or otherwise seeks to enter into a contract or other transaction with the district requiring approval by the board.

Education Code 44.044

Out-of-State Bidders

A district may not award a governmental contract to a nonresident bidder unless the nonresident underbids the lowest bid submitted by a responsible resident bidder by an amount that is not less than the greater of the amount by which a resident bidder would be required to underbid the nonresident bidder to obtain a comparable contract in the state in which the nonresident’s principal place of business is located, or the state in which a majority of the manufacturing relating to the contract will be performed. *Gov’t Code 2252.002*

This requirement does not apply to a contract involving federal funds. A district shall use the information published by the comptroller under Government Code 2252.003 (Publication of Other State’s Laws on Contracts) to evaluate the bid of a nonresident bidder. A district may rely on information published under Government Code 2252.003 to meet the requirements of Government Code 2252.002. *Gov’t Code 2252.003–.004*

“Governmental contract” means a contract awarded by a governmental entity, including a public school district, for general construction, an improvement, a service, or a public works project or for a purchase of supplies, materials, or equipment.

“Resident bidder” refers to a person whose principal place of business is in this state, including a contractor whose ultimate parent company or majority owner has its principal place of business in this state.

Gov’t Code 2252.001

**Professional
Services**

Education Code 44.031 does not apply to a contract for professional services rendered, including the services of an architect, attorney, certified public accountant, engineer, or fiscal agent. A district may, at its option, contract for professional services rendered

by a financial consultant or a technology consultant in the manner provided by Government Code 2254.003 (Professional Services Procurement Act) (see below), in lieu of the methods provided by Education Code 44.031. *Education Code 44.031(f)*

Professional
Services
Procurement Act
Selection

A district may not select a provider of professional services or a group or association of providers or award a contract for the services on the basis of competitive bids submitted for the contract or for the services, but shall make the selection and award on the basis of demonstrated competence and qualifications to perform the services and for a fair and reasonable price. *Gov't Code 2254.003(a)*

Definition

“Professional services” means services:

1. Within the scope of the practice, as defined by state law, of accounting, architecture, landscape architecture, land surveying, medicine, optometry, professional engineering, real estate appraising, professional nursing, or forensic science;
2. Provided in connection with the professional employment or practice of a person who is licensed or registered as a certified public accountant, architect, landscape architect, land surveyor, physician, optometrist, professional engineer, state-certified or state-licensed real estate appraiser, registered nurse, or a forensic analyst or forensic science expert; or
3. Provided by a person lawfully engaged in interior design, regardless of whether the person is registered as an interior designer under Occupations Code Chapter 1053.

Gov't Code 2254.002

[For specific information on procuring architectural or engineering services, see CV. For information on procuring services of physicians, optometrists, and registered nurses under certain circumstances, see Government Code 2254.008.]

Contingent Fee
Contract for Legal
Services

“Contingent fee contract” means a contract for legal services under which the amount or the payment of the fee for the services is contingent in whole or in part on the outcome of the matter for which the services were obtained. The term includes an amendment to a contract for legal services described by this provision if the amendment changes the scope of representation or may result in the filing of an action or the amending of a petition in an existing action. *Gov't Code 2254.101(2)*

Government Code Chapter 2254, Subchapter C provides the manner in which and the situations under which a district may compensate a public contractor under a contingent fee for legal services. That subchapter does not apply to a contract for legal services:

1. Provided to a district under Government Code Chapter 403, Subchapter M; or
2. Entered into by a district for the collection of an obligation, as defined by Government Code 2107.001, that is delinquent [see CCGA(LEGAL) regarding delinquent tax collection] or for services under Government Code 1201.027 [see CCA(LEGAL) regarding issuance of public securities], except that Government Code sections 2254.1032, 2254.1034, 2254.1036, and 2254.1037 do apply to the contract.

Gov't Code 2254.102

A district may select an attorney or law firm to award a contingent fee contract only in accordance with Government Code 2254.003(a) (Professional Services Procurement Act) [see Selection, above] and Government Code 2254.1032.

In procuring legal services under a contingent fee contract, a district shall:

1. Select a well-qualified attorney or law firm on the basis of demonstrated competence, qualifications, and experience in the requested services; and
2. Attempt to negotiate a contract with that attorney or law firm for a fair and reasonable price.

Gov't Code 2254.1032

Specific Purchases

Computers

A district may acquire computers and computer-related equipment, including computer software, through the Department of Information Resources (DIR) under contracts entered into in accordance with Government Code Chapter 2054 or 2157. *Education Code 44.031(i)*

Automated
Information System

A district may purchase an automated information system using the purchasing method described by Government Code 2157.068 for commodity items or a purchasing method designated by the comptroller to obtain the best value for the state, including a request for offers method. A district that purchases an item using a method described above satisfies any state law requiring the district to seek competitive bids for the purchase of the item. *Gov't Code 2157.006; 34 TAC 20.391*

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Automated External Defibrillators	A district that purchases or leases an automated external defibrillator (AED), as defined by Health and Safety Code 779.001, shall ensure that the AED meets standards established by the federal Food and Drug Administration. <i>Education Code 44.047(a)</i>
Insurance	A contract for the purchase of insurance is not a contract for professional services. A district must award such a contract using one of the methods in Education Code 44.031. <i>Atty. Gen. Op. DM-418 (1996)</i>
<i>Multiyear Contracts</i>	A district may execute an insurance contract for a period longer than 12 months, if the contract complies with Local Government Code 271.903(a) [see Commitment of Current Revenue, below]. If a district executes a multiyear insurance contract, it need not advertise for insurance vendors until the 12-month period during which the district will be executing a new insurance contract. <i>Atty. Gen. Op. DM-418 (1996)</i>
Other Purchasing Methods	The comptroller shall establish a program by which the comptroller performs purchasing services for local governments. The services must include:
State Purchasing Program	<ol style="list-style-type: none">1. The extension of state contract prices to participating local governments when the comptroller considers it feasible.2. Solicitation of bids on items desired by local governments if the solicitation is considered feasible by the comptroller and is desired by the local government.3. Provision of information and technical assistance to local governments about the purchasing program. <p>The comptroller may charge a participating local government an amount not to exceed the actual costs incurred by the comptroller in providing purchasing services to the local government under the program.</p> <p><i>Local Gov't Code 271.082</i></p>
<i>District Participation</i>	A district may participate in the purchasing program, including participation in purchases that use the reverse auction procedure, by filing with the comptroller a resolution adopted by the board requesting that the district be allowed to participate on a voluntary basis, and to the extent the comptroller deems feasible, and stating that the district will: <ol style="list-style-type: none">1. Designate an official to act for the district in all matters relating to the program, including the purchase of items from the vendor under any contract, and that the board will direct the decisions of the representative;

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2. Be responsible for:
 - a. Submitting requisitions to the comptroller under any contract; or
 - b. Electronically sending purchase orders directly to vendors, or complying with procedures governing a reverse auction purchase, and electronically sending to the comptroller reports on actual purchases made under this provision that provide the information and are sent at the times required by the comptroller;
3. Be responsible for making payment directly to the vendor;
4. Be responsible for the vendor's compliance with all conditions of delivery and quality of the purchased item.

A district that purchases an item under a state contract or under a reverse auction procedure, sponsored by the comptroller satisfies any state law requiring the district to seek competitive bids for the purchase of the item.

Local Gov't Code 271.083

Multiple Award
Contract Schedule

The comptroller shall develop a schedule of multiple award contracts that have been previously awarded using a competitive process by the federal government or any other governmental entity in any state. *Gov't Code 2155.502(a)*

A district may purchase goods or services directly from a vendor under a contract listed on a schedule developed under Government Code Chapter 2155, Subchapter I. A district contracting for the purchase of an automated information system under a contract listed on a schedule shall comply with Government Code 2157.068(e-1) (Purchase of Information Technology Commodity Items) [see Automated Information System, above]. A purchase authorized by this provision satisfies any requirement of state law relating to competitive bids or proposals.

The price listed for a good or service under a multiple award contract is a maximum price. A district may negotiate a lower price for goods or services under a contract listed on a schedule developed under Government Code Chapter 2155, Subchapter I.

Gov't Code 2155.504

Cooperative
Purchasing
Program

A district may participate in a cooperative purchasing program with another local government of this state or another state or with a local cooperative organization of this state or another state. A district that is participating in a cooperative purchasing program may sign

an agreement with another participating local government or a local cooperative organization stating that the district will:

1. Designate a person to act under the direction of, or on behalf of, the district in all matters relating to the program;
2. Make payments to another participating local government or local cooperative organization or directly to a vendor under a contract made under these provisions, as provided in the agreement between the participating local governments or between a local government and a local cooperative organization; and
3. Be responsible for the vendor's compliance relating to the quality of items and terms of delivery, to the extent provided in the agreement between the participating local governments or between a local government and a local cooperative organization.

A district that purchases goods or services under these provisions satisfies any state law requiring the district to seek competitive bids for the purchase of the goods or services.

Local Gov't Code 271.102; Atty. Gen. Op. JC-37 (1999)

*Cooperative
Purchasing
Contract Fees*

A district that enters into a purchasing contract valued at \$25,000 or more under Education Code 44.031(a)(5) (interlocal contract), under Local Government Code Chapter 271, Subchapter F (cooperative purchasing program), or under any other cooperative purchasing program authorized for school districts by law shall document a contract-related fee, including a management fee, paid by or to the district and the purpose of each fee under the contract.

The amount, purpose, and disposition of any fee described above must be presented in a written report and submitted annually in an open meeting of the board. The written report must appear as an agenda item. The commissioner of education may audit the written report.

Education Code 44.0331

**Commitment of
Current Revenue**

If a contract for the acquisition, including lease, of real or personal property retains to the board the continuing right to terminate at the expiration of each budget period during the term of the contract, is conditioned on a best efforts attempt by the board to obtain and appropriate funds for payment of the contract, or contains both the continuing right to terminate and the best efforts conditions, the contract is a commitment of a district's current revenue only. *Local Gov't Code 271.903*

Change Orders

For provisions regarding change orders, see CV.

Criminal Offenses

An officer, employee, or agent of a district commits an offense if the person with criminal negligence makes or authorizes separate, sequential, or component purchases to avoid the requirements of Education Code 44.031(a) or (b). An offense under this provision is a Class B misdemeanor and is an offense involving moral turpitude.

“Component purchases” means purchases of the component parts of an item that in normal purchasing practices would be made in one purchase. “Separate purchases” means purchases, made separately, of items that in normal purchasing practices would be made in one purchase. “Sequential purchases” means purchases, made over a period, of items that in normal purchasing practices would be made in one purchase.

Education Code 44.032(a)–(b)

An officer, employee, or agent of a district commits an offense if the person with criminal negligence violates Education Code 44.031(a) or (b) other than by conduct described by Education Code 44.032(b). An offense under this provision is a Class B misdemeanor and is an offense involving moral turpitude. *Education Code 44.032(c)*

An officer or employee of a district commits an offense if the officer or employee knowingly violates Education Code 44.031, other than by conduct described by Education Code 44.032(b) or (c). An offense under this provision is a Class C misdemeanor. *Education Code 44.032(d)*

Removal from
Office

The final conviction of a person other than a trustee of a district for an offense under Education Code 44.032(b) or (c) above results in the immediate removal from office or employment of that person. A trustee who is convicted of an offense under Education Code 44.032 is considered to have committed official misconduct for purposes of Local Government Code Chapter 87, and is subject to removal as provided by that chapter and Texas Constitution Article V, Section 24. For four years after the date of the final conviction, the removed person is ineligible to be a candidate for or to be appointed or elected to a public office in Texas, is ineligible to be employed by or act as an agent for the state or a political subdivision of the state, and is ineligible to receive any compensation through a contract with the state or a political subdivision of the state. *Education Code 44.032(e)*

Injunction

A court may enjoin performance of a contract made in violation of Education Code Chapter 44, Subchapter B. A county attorney, district attorney, criminal district attorney, citizen of the county in which

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the district is located, or any interested party may bring an action for an injunction. A party who prevails in an action brought under this provision is entitled to reasonable attorney's fees as approved by the court. *Education Code 44.032(f)*

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**Purchasing
Authority**

The Board delegates to the Superintendent the authority to make budgeted purchases for goods or services. However, any single, budgeted purchase of goods or services that costs \$50,000 or more, regardless of whether the goods or services are competitively purchased, shall require Board approval before a transaction may take place.

Exception for
Emergency
Contracts

In the event of a catastrophe, emergency, or natural disaster affecting the District, the Board delegates to the Superintendent the authority to contract for the replacement, construction, or repair of school equipment or facilities in accordance with law, if emergency replacement, construction, or repair is necessary for the health and safety of District students and staff. The Superintendent shall report to the Board at the next regular meeting any contract made under this authority. [See Disaster Exception, CH(LEGAL)]

The delegation regarding emergency contracts does not waive competitive purchasing requirements under Education Code Chapter 44. Only the Board is authorized to waive competitive purchasing requirements under limited circumstances in accordance with Education Code 44.031(h). [See Emergency Damage or Destruction, CH(LEGAL)]

Purchasing
Procedures

The Superintendent shall develop purchasing procedures to implement the requirements of state and federal law. [See also CB, CBB, CH(LEGAL), and COA]

Purchasing Method

The Board delegates to the Superintendent the authority to determine the method of purchasing in accordance with CH(LEGAL) or CBB(LEGAL), as appropriate.

*Competitive
Bidding*

If competitive bidding is chosen as the purchasing method, the Superintendent shall prepare bid specifications. All bids shall be in accordance with administrative regulations, and the submission of any electronic bids shall also be in accordance with Board-adopted rules. All bidders shall be invited to attend the bid opening. Any bid may be withdrawn prior to the scheduled time for opening. Bids received after the specified time shall not be considered.

The District may reject any and all bids in accordance with state or federal law, as applicable.

*Competitive
Sealed Proposals*

If competitive sealed proposals are chosen as the purchasing method, the Superintendent shall prepare the request for proposals and/or specifications for items to be purchased. All proposals shall be in accordance with administrative regulations, and the submission of any electronic proposals shall also be in accordance with Board-adopted rules. Proposals received after the specified time shall not be considered. Proposals shall be opened at the time

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specified, and all proposers shall be invited to attend the proposal opening. Proposals may be withdrawn prior to the scheduled time of opening. Changes in the content of a proposal, and in prices, may be negotiated after proposals are opened.

The District may reject any and all proposals in accordance with state or federal law, as applicable.

Electronic Bids or Proposals

Bids or proposals that the District has chosen to accept through electronic transmission shall be administered in accordance with Board-adopted rules. Such rules shall safeguard the integrity of the competitive procurement process; ensure the identification, security, and confidentiality of electronic bids or proposals; and ensure that the electronic bids or proposals remain effectively unopened until the proper time.

Responsibility for Debts

The Board shall assume responsibility for debts incurred in the name of the District so long as those debts are for purchases made in accordance with the adopted budget, state law, Board policy, and the District's purchasing procedures. [See CE] The Board shall not be responsible for debts incurred by persons or organizations not directly under Board control. Persons making unauthorized purchases shall assume full responsibility for all such debts.

Purchase Commitments

All purchase commitments shall be made by the Superintendent in accordance with administrative procedures, including the District's purchasing procedures.

Personal Purchases

District employees shall not be permitted to make purchases for personal use through the District's business office.

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Note: For provisions regarding selection and adoption of instructional materials, see EFA.

**Instructional
Materials and
Technology**

Instructional materials selected for use in the public schools shall be furnished without cost to the students attending those schools. Except as provided by Education Code 31.104(d), a district may not charge a student for instructional material or technological equipment purchased by the district with the district's technology and instructional materials allotment. *Education Code 31.001*

Each instructional material, including electronic instructional material only to the extent of any applicable licensing agreement, purchased as provided by Education Code Chapter 31 for a district is the property of the district. *Education Code 31.102(a)-(b)*

Allotment

A district is entitled to an allotment each biennium from the state instructional materials and technology fund for each student enrolled in the district on a date during the last year of the preceding biennium specified by the commissioner of education. The commissioner shall determine the amount of the allotment per student each biennium on the basis of the amount of money available in the state instructional materials and technology fund to fund the allotment. The allotment shall be transferred from the state instructional materials and technology fund to the credit of the district's instructional materials and technology account as provided by Education Code 31.0212. *Education Code 31.0211(a)*

The commissioner shall, as early as practicable during each biennium, notify each district of the estimated amount to which the district will be entitled during the next fiscal biennium. *Education Code 31.0215(a)*

No Appeal

The amount of the allotment determined by the commissioner is final and may not be appealed. *19 TAC 66.1307(d)*

**Delayed Publisher
Payment Option**

A district may requisition and receive state-adopted instructional materials before allotment funds for those materials are available. The total cost of delayed-payment-option materials requisitioned may not exceed 80 percent of the district's expected allotment for the subsequent biennium.

When a district submits a requisition for instructional materials under this provision, the Texas Education Agency (TEA) will expend a district's existing allotment balance before applying the delayed payment option. TEA will make payment for any remaining balance for a district's order as the allotment funds become available and will prioritize payment for requisitions over reimbursement of purchases made directly by a district.

The commissioner shall ensure that publishers of instructional materials are informed of any potential delay in payment and that payment is subject to the availability of appropriated funds. Publishers may decline orders for which payments could be delayed. A publisher's decision to decline an order shall affect all of that publisher's orders for which payments could be delayed. Publishers may not selectively decline individual orders or orders from individual districts. Government Code Chapter 2251 does not apply to requisitions under this provision.

Education Code 31.0215; 19 TAC 66.1312

Allotment
Adjustment

*Change in
Enrollment*

Not later than May 31 of each school year, a district may request that the commissioner adjust the number of students for which the district is entitled to receive an allotment on the grounds that the number of students attending school in the district will increase or decrease during the school year for which the allotment is provided. The commissioner may also adjust the number of students for which a district is entitled to receive an allotment, without a request by the district, if the commissioner determines a different number of students is a more accurate reflection of students who will be attending school in the district. The commissioner's determination is final. *Education Code 31.0211(e)*

*High Enrollment
Growth*

Each year the commissioner shall adjust the instructional materials and technology allotment of districts experiencing high enrollment growth. *Education Code 31.0214(a)*

High-enrollment growth adjustments will be based on the difference between the district's percentage of enrollment growth and that of the state. Enrollment growth calculations will be determined each fiscal year based on fall Texas Student Data Systems Public Education Information Management System (TSDS PEIMS) enrollment data. The amount of the adjustment determined by the commissioner is final and may not be appealed.

If sufficient funds are available, high-enrollment growth adjustments will be granted once each fiscal year. Notwithstanding this, a district that experiences an unexpected growth:

1. Of at least two percent due to a natural or man-made disaster or catastrophic event may apply for additional funding at any time during a fiscal year.
2. In its bilingual population of at least ten percent in any school year may apply for additional bilingual funding at any time during a fiscal year.

Any additional funding will be dependent on the availability of funds.

The per-student high-enrollment growth adjustment granted in the second year of a biennium shall not exceed one-half of the per-student amount established as the biennial allotment.

19 TAC 66.1309

Permitted
Expenditures

The allotment may be used to purchase:

1. Materials on the list adopted by the commissioner under Education Code 31.0231;
2. Instructional materials, regardless of whether the instructional materials are on the list adopted under Education Code 31.024;
3. Consumable instructional materials, including workbooks;
4. Instructional materials for use in bilingual education classes, as provided by Education Code 31.029;
5. Instructional materials for use in college preparatory courses under Education Code 28.014, as provided by Education Code 31.031;
6. Supplemental instructional materials, as provided by Education Code 31.035;
7. State-developed open education resource instructional materials, as provided by Education Code Chapter 31, Subchapter B-1;
8. Instructional materials and technological equipment under any continuing contracts of the district in effect on September 1, 2011;
9. Technological equipment necessary to support the use of materials included on the list adopted by the commissioner under Education Code 31.0231 or any instructional materials purchased with an allotment under these provisions;
10. Inventory software or systems for storing, managing, and accessing instructional materials and analyzing the usage and effectiveness of the instructional materials; and
11. Services, equipment, and technology infrastructure necessary to ensure internet connectivity and adequate bandwidth.

The allotment may be used to pay:

1. For training educational personnel directly involved in student learning in the appropriate use of instructional materials and

for providing for access to technological equipment for instructional use;

2. For training personnel in the electronic administration of assessment instruments;
3. The salary and other expenses of an employee who provides technical support for the use of technological equipment directly involved in student learning; and
4. For costs associated with distance learning, including Wi-Fi, internet access hotspots, wireless network service, broadband service, and other services and technological equipment necessary to facilitate internet access.

Education Code 31.0211(c); 19 TAC 66.1307(f)

*Technological
Equipment*

In purchasing technological equipment, a school district shall:

1. Secure technological solutions that meet the varying and unique needs of students and teachers in the district; and
2. Consider the long-term cost of ownership and flexibility for innovation.

Education Code 31.0211(d-1)

Prohibited
Expenditures

The allotment may not be used to pay for:

1. Services for installation;
2. The physical conduit that transmits data such as cabling and wiring or electricity;
3. Office and school supplies;
4. Items that are not directly related to student instruction such as furniture, athletic equipment, extension cords, temporary contractors, or video surveillance equipment;
5. Travel expenses; or
6. Equipment used for moving or storing instructional materials.

19 TAC 66.1307(g)

Certification of
Allotment

A district shall annually certify to the commissioner that the district's allotment has been used only for permitted expenses. *Education Code 31.0213*

**Instructional
Materials and
Technology Account**

The commissioner shall maintain an instructional materials and technology account for each district. In the first year of each biennium, the commissioner shall deposit the district's allotment in the

account. The commissioner shall pay the cost of instructional materials requisitioned by a district under Education Code 31.103 using funds from the district's instructional materials and technology account.

A district may also use funds in the district's account to purchase electronic instructional materials or technological equipment. The district shall submit to the commissioner a request for funds for this purpose from the district's account in accordance with the commissioner's rules.

Money deposited in a district's instructional materials and technology account during each state fiscal biennium remains in the account and available for use by the district for the entire biennium. At the end of each biennium, a district with unused money in the district's account may carry forward any remaining balance to the next biennium.

Education Code 31.0212

Access to Allotment

The allotment for each biennium will be made available for district use through the state's online instructional material ordering system (EMAT) as early as possible in the fiscal year preceding the beginning of the biennium for which the funds have been appropriated. A district may access its allotment for any upcoming school year upon completion of:

1. Submission to the commissioner certification that:
 - a. The district has instructional materials that cover all the required Texas essential knowledge and skills (TEKS), except those for physical education, as required by Education Code 31.004 [see Certification of Instructional Materials, below]; and
 - b. The district has used its allotment for only the allowable expenditures [see Permitted Expenditures and Certification of Allotment Use, above]; and
2. Preparation by TEA of EMAT for the new school year with the new allotment amounts.

Upon completion of these requirements, a district may access its funds by correctly providing all information required in EMAT.

19 TAC 66.1307(h)-(j)

Online Requisition System (EMAT)

The commissioner shall maintain an online requisition system (EMAT) for districts to requisition instructional materials to be purchased with the district's allotment. *Education Code 31.101(f)*

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Delegation of Authority	The board may delegate to an employee the authority to requisition, distribute, and manage the inventory of instructional materials, consistent with Education Code Chapter 31 and rules adopted under that chapter. <i>Education Code 31.104(a)</i>
Local Funds	A district may use local funds to purchase any instructional materials in addition to those selected under Education Code Chapter 31. <i>Education Code 31.106</i>
Requisitions, Use, and Distribution	A district shall make a requisition for instructional materials using the online requisition program (EMAT) maintained by the commissioner. A district may requisition instructional materials on the State Board of Education (SBOE) instructional materials list for grades above the grade level in which a student is enrolled. <i>Education Code 31.103(b)–(c)</i>
Distribution	The board shall distribute printed instructional materials to students in the manner that the board determines is most effective and economical. <i>Education Code 31.102(c)</i>
Supplemental Instructional Materials	A district may requisition supplemental instructional material adopted by the SBOE but not on the instructional material list adopted under Education Code 31.023 only if the district requisitions the supplemental instructional material along with other supplemental instructional materials or instructional materials on the list adopted under Education Code 31.023 that in combination cover each element of the essential knowledge and skills for the course for which the district is requisitioning the supplemental instructional materials. <i>Education Code 31.035(d)</i>
Availability of Open Education Resource Instructional Materials	A district that selects open education resource instructional material shall requisition a sufficient number of printed copies for use by students unable to access the instructional material electronically unless the district provides to each student: <ol style="list-style-type: none">1. Electronic access to the instructional material at no cost to the student; or2. Printed copies of the portion of the instructional material that will be used in the course. <i>Education Code 31.103(d)</i>
Employee Training	The board shall require the employee responsible for ordering instructional materials to complete TEA-developed training in the use of the allotment and the use of the instructional materials ordering system (EMAT). Training shall be completed prior to ordering instructional materials for the first time and again each time the dis-

trict is notified by TEA that the training has been updated. The district shall maintain documentation of the completion of the required training. *19 TAC 66.107(d)*

Special Instructional Materials

All laws and rules applying to instructional materials provided to students with no disabilities that are not in conflict with Education Code 31.028 or 19 Administrative Code 66.1311 shall apply to the distribution and control of special instructional materials. Special instructional materials include braille, large-print, and audio books and any other formats designed specifically to provide equal access to students with disabilities.

Requisitions for special instructional materials shall be based on actual student enrollment but may include up to two copies per student if necessary to meet individual need.

Special instructional materials are the property of the state. A district is responsible for replacing or reimbursing the state for lost, stolen, or damaged special instructional materials.

For Teachers

Adopted instructional materials needed by a teacher with a print disability to carry out his or her instructional duties shall be furnished in the required format without cost. The materials are to be loaned to the district as long as needed and are to be returned to the state when they are no longer needed.

For Parents

Adopted instructional materials in a specialized format that are requested by a parent with a print disability shall be furnished without cost by the state. Requests for electronic files shall be filled by TEA after the parent signs and TEA receives a statement, through the district, promising that the parent will safeguard the security of the files and observe all current copyright laws, including those that forbid reproduction of the files and their transfer to other parties. All specialized instructional material formats and electronic files that have been provided must be returned to the local school district at the end of the school year.

19 TAC 66.1311

Bilingual Instructional Materials

A district shall purchase with its allotment or otherwise acquire instructional materials for use in bilingual education classes. The commissioner shall determine the amount of the allotment for bilingual education based on TSDS PEIMS bilingual enrollment data from the fall collection of the school year preceding the first year of each biennium. *Education Code 31.029; 19 TAC 66.1307(c)*

Certification of Instructional Materials

Prior to the beginning of each school year, a district shall submit to the SBOE and commissioner certification that for each subject in the required curriculum under Education Code 28.002, other than physical education, and each grade level, the district provides each

student with instructional materials that cover all elements of the essential knowledge and skills adopted by the SBOE for that subject and grade level. The certification shall be submitted in a format approved by the commissioner and can be based on both state-adopted and non-state-adopted materials.

To determine whether each student has instructional materials that cover all elements of the essential knowledge and skills, a district may consider:

1. Instructional materials adopted by the SBOE;
2. Materials adopted or purchased by the commissioner under Education Code 31.0231 or Education Code Chapter 31, Subchapter B-1;
3. Open education resource instructional materials submitted by eligible institutions and adopted by the SBOE;
4. Open education resource instructional materials made available by other public schools;
5. Instructional materials developed or purchased by the district; and
6. Open education resource instructional materials and other electronic instructional materials included in the repository under Education Code 31.083.

The certifications shall be ratified by the board in a public, noticed meeting.

Education Code 31.004; 19 TAC 66.105

Ownership

Except as otherwise provided, a student must return all instructional materials to the teacher at the end of the school year or when the student withdraws from school. At the end of the school year for which open education resource instructional material that a district does not intend to use for another student is distributed, the printed copy of the open education resource instructional material becomes the property of the student to whom it is distributed.

This provision does not apply to an electronic copy of open education resource instructional material.

Education Code 31.104(c), (g)–(h); 19 TAC 66.107(b)

Responsibility for Instructional Materials and Equipment

Each student or the student's parent or guardian is responsible for all instructional material and technological equipment not returned in an acceptable condition by the student. A student who fails to return in an acceptable condition all instructional materials and technological equipment forfeits the right to free instructional materials

and technological equipment until all instructional materials and technological equipment previously issued but not returned in an acceptable condition are paid for by the student, parent, or guardian.

As provided by board policy, a district may waive or reduce the payment required if the student is from a low-income family. [See FP] The district shall allow the student to use instructional materials and technological equipment at school during each school day.

If instructional materials or technological equipment is not returned in an acceptable condition or paid for, a district may withhold the student's records. A district may not prevent the student from graduating, participating in a graduation ceremony, or receiving a diploma. [See FL and GBA regarding student and parental right to access records; and FD, FFAB, and FL regarding a district's duties to provide records to another district]

The board may not require an employee of the district who acts in good faith to pay for instructional materials or technological equipment that is stolen, misplaced, or not returned by a student. [See DG]

These provisions do not apply to an electronic copy of open education resource instructional material.

Education Code 31.104(d), (e), (h); 19 TAC 66.107(c) [See also EF]

Acceptable
Condition

Printed instructional materials are considered to be in acceptable condition if:

1. The cover, binding, pages, spine, and all integral components of the instructional materials are wholly intact and the instructional materials are fully usable by students; and
2. No component of the instructional materials is soiled, torn, or damaged (whether intentionally or by lack of appropriate care) to the extent that any portion of the content is too disfigured or obscured to be fully accessible to other students.

Electronic instructional materials are considered to be in acceptable condition if:

1. All components or applications that are a part of the electronic instructional materials are returned;
2. The electronic materials perform as they did when they were new;

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3. The electronic instructional materials do not contain computer code (e.g., bug, virus, worm, or similar malicious software) that has been designed to self-replicate, damage, change, or otherwise hinder the performance of any computer's memory, file system, or software; and
4. The electronic instructional materials have not been installed with plug-ins, snap-ins, or add-ins without the prior approval of the district.

Technological equipment is considered to be in acceptable condition if:

1. The equipment is returned with the software and hardware in their original condition unless the district authorized changes; and
2. The physical condition of the equipment is fully usable as it was originally intended to be used.

19 TAC 66.1310

Lost or Damaged
Instructional
Materials

A district may order replacements for instructional materials that have been lost or damaged directly from the publisher of the instructional materials or any source for a printed copy of open education resource instructional material. *Education Code 31.104*

Sale or Disposal

The board shall determine how the district will dispose of discontinued printed instructional materials, electronic instructional materials, and technological equipment.

Sale

The board may sell printed instructional materials on the date the instructional material is discontinued for use in the public schools by the SBOE or the commissioner. The board may also sell electronic instructional materials and technological equipment owned by the district.

Use of Proceeds

Any funds received by a district from a sale must be used to purchase instructional materials and technological equipment allowed under Education Code 31.0211.

Disposal

The board may dispose of printed instructional material before the date the instructional material is discontinued for use in the public schools by the SBOE if the board determines that the instructional material is not needed by the district and the board does not reasonably expect that the instructional material will be needed. A district must notify the commissioner of any instructional material the district disposes of under this provision.

Education Code 31.105

Annual Inventory

A district shall conduct an annual physical inventory of all currently adopted instructional materials that have been requisitioned by and delivered to the district. The results of the inventory shall be recorded in the district's files. *19 TAC 66.107(a)*

Local Handling Expenses

School districts shall not be reimbursed from state funds for expenses incurred in local handling of instructional materials. *19 TAC 66.104(d)*

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CSISD

PURCHASING POLICIES & PROCEDURES MANUAL

Rev. 09.2021

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COLLEGE STATION I.S.D.

1. PURCHASING POLICIES AND PROCEDURE MANUAL

- 1.1. The purpose is to establish uniform policies and procedures for the procurement of goods and services that is consistent with Texas Education Code 44.031, Government Code Ch. 2267, EDGAR 2 CFR 200.317-200.327 and policies of College Station I.S.D. (CSISD)
- 1.2. For all purchases with federal grants, the district shall comply with the federal regulations, EDGAR related to the purchasing of goods and services (2 CFR 200.317-200.327) effective September 1, 2018. This does not apply to other procedures required by EDGAR.
- 1.3. The objective of this policy and procedure is to provide a process to purchase products, material and services from the most responsive bidder that is within statutes and polices.
- 1.4. The scope for this procedure applies to all goods and service purchases and related activities.

It is the individual responsibility of each employee involved in the procurement process to understand the policies upon which these procedures are based, the meaning, and intent of the procedure themselves.

If there are any questions or concerns relative to either the policies or procedures, or the ability of the employee to respond effectively to the requirements of the procedures, then it is the responsibility of the employee to bring such matters to the attention of their immediate supervisor before any action is taken.

The fundamental purpose of these procedures is not to restrict the effectiveness of the individuals involved in the procurement of personal property, but to provide a foundation for effective, consistent, procurement practices that result in a positive, professional relationship between the district and the vendors who serve CSISD.

2. PURCHASING AUTHORITY

2.1 Statutory Authority

2.1.1. Statutes containing requirements for competitive procurement for school districts are found in the Texas Education Code, Local Government Code, Government Code, Texas Revised Civil Statutes, Texas Attorney General Opinions, federal regulations, and other sources. These various statutes are too numerous to cite in this manual, but the primary legal reference for purchasing laws in Texas is found in Texas Education Code 44.031 through 44.041 and 2267.

2.2. Local Policy

- 2.2.1. School Board Policies related to purchasing authority are found in Board Policy CH (Local)
- 2.2.2. The Superintendent or designee has the authority to determine the method of purchasing to be used, in accordance with state law, and to make budgeted purchases unless state law requires the Board of Trustees to make or approve a purchase.
- 2.2.3. The Superintendent has delegated purchasing authority to the Purchasing Department. The Business Office verifies availability of funds, and the Purchasing Director reviews purchase orders for accuracy and completeness, proper signatures, and approves purchase orders. In the absence of the Purchasing Director, or in addition to, the Chief Financial Officer may also approve purchase orders.
- 2.2.4. In all cases, purchase commitments shall be made on a properly drawn and issued purchase order in accordance with administrative procedures outlined in this manual. The Board of Trustees or the District shall not be responsible for debts incurred by persons or organizations not directly under Board control. Persons making unauthorized purchases shall assume full responsibility for all such debts. Further the District shall not be responsible for unauthorized shipment of goods or delivery of services by a vendor, which are not the result of having received a bona fide purchase order from the district.

3. PURCHASING ETHICS

- 3.1. The competitive nature of the purchasing function and the expenditure of significant public funds require that ethical standards be incorporated into the foundation of all purchasing functions. School district staff face the difficult task of developing good vendor relations and encouraging vendor competition while avoiding even the appearance of favoritism or other ethical misconduct.

3.2. Common Standards of Ethics

3.2.1. It is a breach of ethics:

- To attempt to realize gain in making purchases in the course of District employment.
- To attempt to influence any public employee of a school district to breach the standards of ethics set forth herein;
- For any employee of the school district to participate directly or indirectly in a procurement when the employee knows that:
 - The employee or 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 family is negotiating or has an arrangement concerning prospective employment is involved in the procurement.
- For a Board Member or other official who has a substantial interest in a procurement to discuss or participate in a decision regarding the award of a procurement to discuss or participate in a decision or participate in a decision regarding the award of a procurement contract (See local Government Code, Chapter 171). In addition, the Board Member should disclose the substantial interest by filing a Conflict-of-Interest Disclosure with the District;
- To offer, give, or agree to give any employee or former employee, or for any employee or former employee to solicit, demand, accept or agree to accept from another person, a gratuity, offer of employment or anything of value in connection with any decision, approval, disapproval, recommendation, or any other purchasing decision.

- For any payment or gratuity to be made or on behalf of a vendor, or accepted by a District employee or Board Member, as an inducement for the award of a contract or purchase order. Acceptance of gratuities may be construed as a criminal offense.

3.3 Impermissible Purchasing Practices

3.3.1. Employees, in an effort to get the job done successfully and on time, may be tempted to circumvent policies, procedures, and laws, or to make liberal interpretations thereof. Such activity well intentioned will cause ethical problems. The following practices are specifically prohibited as means to circumvent competitive purchasing requirements:

- **Sequential Purchasing** – Circumventing bid or proposal laws by spreading purchases over time that normally would be purchased at the same time.
- **Component Purchasing** – Circumventing bid or proposal laws by purchasing component parts of an item that would normally be purchased as a single item or unit.
- **Separate Purchasing** – Circumventing bid or proposal laws by issuing separate orders or contracts that would normally be single order or contract.

3.4. Penalties

3.4.1. State law relating to violation of purchasing requirements imposes upon violators certain criminal penalties which are found in Section 44.032, Texas Education Code, and Chapter 271, Local Government Code.

3.4.2. An officer, employee, or agent of a school district commits an offense if the person with criminal negligence makes or authorizes separate, sequential, or component purchase to avoid competitive procurement requirements. An offense under this subsection is a class B misdemeanor and is an offense involving moral turpitude.

3.4.3. An officer, employee, or agent of a school district commits an offense if the officer or employee knowingly violates Section 44.031. An offense under this subsection is a class C misdemeanor.

3.4.4. The final conviction of an employee for an offense under section 44.031 (a) or (b) may result in immediate removal from employment. A trustee who is convicted of an offense under this section is considered to have committed official misconduct and is subject to removal from office.

For four years after the date of the final conviction, the removed person may be ineligible to be a candidate for or to be appointed or elected to a public office in this state or is ineligible to be employed by or act as an agent for the state or a political subdivision.

3.4.5 Violation of federal procurement law can result in the contract being voided, complaints from vendors, costly litigation, repayment of federal funds and criminal penalties for the employees involved.

4. PREPARATION AND CONTROL OF PURCHASE ORDERS

4.1 Any district or campus administrator, or designee may initiate requisitions. The district or campus administrator with the campus or organization budgetary control or designee must approve requisitions. Requisitions will be reviewed, and purchase orders printed and issued approximately within twenty-four hours after receipt. A requisition does not become a purchase order until it has been properly approved and issued as described in 4.2 below. Purchases that require formal advertisement and/or acquisition through a competitive procurement method (i.e. purchases in excess of \$50,000) may require four to six weeks due to development of a proposal/bid document, advertising time, and perhaps Board approval.

4.2 Requisitions / Purchase Order Flow

4.2.1. Originator prepares requisition, which must be completed in its entirety. Including attachments.

4.2.2. Originator forwards requisition to campus or department administrator/designee for approval.

- 4.2.3. The campus or department administrator or designee will approve the requisition in eFinance.
- 4.2.4. A Purchasing Specialist will review, and approve the requisition and print purchase order, and forward to the Purchasing Director for approval of purchase orders over \$500, after attaching any necessary EDGAR paperwork and debarment information. At this step, the purchase order is reviewed to be sure that an awarded vendor has been selected, and to verify that competitive procurement procedures (if applicable) or local procurement policies have been observed.
- 4.2.5. The purchase order is returned to the Purchasing Specialist for distribution, i.e. original to vendor, copies to originator, file, etc.
- 4.3. Emergency Purchases
 - 4.3.1. Emergency purchases are those issued verbally, or “walked through” when a situation arises that justifies immediate purchase authority.
 - 4.3.2. Special handling for any purchase interrupts the normal flow of business and is a very inefficient use of time. Only bona fide emergencies are exceptions to normal procedure. An emergency is defined as an event that may endanger health or well-being, or an event that may cause a substantial disruption of the educational process.
 - 4.3.3. The emergency must be discussed with and approved by the Chief Financial Officer and requires board approval.
- 4.4. Blanket Purchase Orders
 - 4.4.1. Blanket purchase orders are generally issued to a particular vendor to cover multiple, small dollar amount purchases, which are needed over a period of time. The items purchased are usually needed “on the spot”. A blanket purchase order works much like a charge account with a specific limit on a dollar volume that can be purchased over the period, and/or a limit to the duration of the purchase order, a month, for example.

4.4.2. Blanket purchase order vendors should be selected using competitive procurement methods through catalog discount, or percent off list price arrangement. Competitive procurement is required if the anticipated dollar volume during a twelve-month period exceeds \$50,000.

4.4.3. Use the following procedure:

- A requisition will be entered with a "not to exceed" dollar amount.
- Upon approval by the Purchasing Director, a blanket purchase order will be issued.
- It is the responsibility of the requester to manage the amount listed in the purchase order. Once purchases reach the "not to exceed" limit, the requestor must close the purchase and request another.
- At the end of each month, the requestor must reconcile accumulated purchases and ensure that the purchase order limit has not been exceeded.

4.5. Cancellation of Purchase Orders

4.5.1. Purchase orders are valid until canceled. Originators who wish to cancel a purchase order must notify the vendor and the Business Office, who will officially cancel the purchase order.

4.5.2. In the event that a vendor has begun production of a custom-made part or product, or has secured for delivery to the District an article that the vendor is not likely to sell or stock within the vendor's normal scope of business, or if the vendor has incurred costs as the vendor may incur as a result of the premature cancellation; the department/campus is responsible for any cost not to exceed the original cost on the purchase order.

4.5.3. The Purchasing Department will liquidate all encumbrances at the end of each fiscal year. Any outstanding order for which delivery is expected after the end of the fiscal year will be rolled to the new year and will be re-encumbered with the same purchase order number using the next FY funds.

4.6. Petty Cash Purchases

There are situations where the use of a purchase order is not economically feasible because of the small dollar value of the purchase. In these situations, petty cash may be used to make purchases of less than \$50.00. If a petty cash account has been authorized and established by the Business Office. Petty cash accounts will be limited to \$200.00, unless approved by the Business Office. The employee must get the authorization from a campus principal or department supervisor before purchasing any product. To get reimbursed the employee must complete a Petty Cash Reimbursement Requisition Form and return the completed form to a campus principal or department supervisor with the purchase receipt.

4.7. Warehouse Requisitions

There are several items that can be requested from the District Warehouse. A catalog is posted on the Purchasing Department website. An employee must submit a warehouse requisition in eFinance. The product will be delivered by purchasing staff the following day.

4.8. Standardization

4.8.1. Standardization of certain supplies is permitted when the practice optimizes cost reduction and/or reduces manpower. For example, standardizing computer hardware enables technicians to be trained on one or two rather than dozens of computer brands. It allows less money to be reserved in parts inventory and enables quantity pricing from vendors. Standardization issues must be discussed with and approved by the Purchasing Director to ensure that decisions are not in violation of applicable laws and policies.

4.8.2. The Purchasing Department will be responsible for maintaining standard bid specifications with assistance from all district departments.

4.9. Contract Review

4.9.1. All contracts for services and/or goods purchased with local, state, or federal grant funds shall be subjected to the review and approval process established for district contracts. The Contract Procedures and Checklist are applicable to all local, state or federally funded contracts and are included in the forms section of this manual.

4.10. Self-Certification

- 4.10.1. Beginning September 1, 2018, the District shall complete a review of the federal grant procurement system on an annual basis to self-certify that the procurement system is efficient and effective. The Director of Purchasing shall oversee the completion of the self-certification and submit it to the Director of Business Services. The results of the certification shall be distributed to all federal grant management staff. If deficiencies are noted, the Director of Purchasing shall develop a Corrective Action Plan to remedy the deficiencies, as appropriate.

5. PRICE QUOTES

- 5.1. This procedure applies to all purchases of supplies, services, materials, capital outlay items, and services unless specifically exempted by law.
- 5.2. A District level administrator or campus principal shall make all purchase commitments on a properly drawn and issued purchase order as follows:
 - 5.2.1. For purchases less than \$10,000, quotations are not required, but are encouraged to obtain best value.
 - 5.2.2. \$10,000-\$49,999: Written quotations from at least two vendors secured and attached to the requisition or use of district approved annual bid, cooperative, inter local agreement or state contract, if using state or local funds. If using federal funds, then 2 quotes minimum are required once the commodity code reaches the small purchase limit. Quotations by email, fax, Internet print out, or hand delivery must be attached to the purchase requisition. Please note all federal purchases will be aggregated by fiscal year by Commodity Code/Like Type Item. When we reach the \$25,000 total purchases by Commodity Code/Like Type Item the purchase is then considered a Small Purchase and 2 quotes are required. The district defines the Commodity Codes/Like Type Items, but a single PO or single vendor purchases cannot be considered an item. For fiscal year, 2021-2022, the Business Office self-certified the micro-purchase limit to \$25,000.
 - 5.2.3. For purchases, with an aggregate annual value of \$50,000 or more, formal competitive quotations are required. The Purchasing Director will coordinate the procurement of all purchases valued above \$50,000. Formal competitive procurement methods may be used as outlined in 6.
 - 5.2.4. \$250,000+: Purchases with federal funds require the Purchasing Department to perform an Independent Estimate Determination prior to advertising for bids or proposals and a Cost and Price Analysis prior to awarding or entering into a contract.

6. COMPETITIVE PROCUREMENT OPTIONS

- 6.1. The purpose of this procedure is to provide guidance for the regulations that apply to purchases of supplies, services, materials, and equipment that are required by law to be competitively bid, and procured by one of eight competitive procurement methods set forth in Texas Education Code 44.031.3
- 6.2. For purchases with an aggregate annual value of \$50,000 or greater, the formal competitive procurement method which provides best value to the district must be used. The Purchasing Director will coordinate the procurement of all purchases valued at \$50,000 or more. Following are procurement methods authorized:
 - Competitive Bidding
 - Competitive Sealed Proposals
 - Request for Proposals
 - Interlocal Contract
 - Design/Build Contract
 - Construction Management at Risk Contract
 - Job Order Contract

The purpose and intent of competitive procurement is to secure the best product at the lowest price by stimulating competition.

Determination by Board of Trustees which method will provide the best value for the district must be done first, if a construction project. The RFP must state the selection criteria that will be used to evaluate the offer and/or relative weights, if known at the time of the publication.

- 6.3. These regulations and procedures apply to all purchases as follows:
 - 6.3.1. Purchase of supplies, services, materials, and equipment, except contracts for the purchase of produce or vehicle fuel, valued at \$50,000 or more in the aggregate for a twelve (12) month period are to be made by the method or methods that provide the best value to the district.
 - 6.3.2. Purchase, lease, or lease-purchase of a school bus must be competitively bid if the contract is valued at \$20,000 or more.
 - 6.3.3. Federally funded child nutrition program purchases of at least \$50,000 must be competitively bid.

6.4. Competitive Bids

6.4.1. The requisitioning party shall furnish a completed purchase requisition form and detailed specifications to the Purchasing Department along with the budget authorization and recommended sources of suppliers (vendors), if known by the user.

6.4.2. Bid Form Preparation – Upon approval of the request, completed and approved specifications, the Purchasing Department will finalize into a bid document.

6.4.3. Advertisement and Notification – The bid advertisement stating a brief description of the item(s), where the documents, plans or specifications may be examined, the time and place for bid opening, will be published in a local newspaper:

- Once a week for at least two weeks prior to the deadline for opening bids for purchases greater than \$50,000.

6.4.4. Bid openings must be at least ten days from the date of the second publication. Bid requests shall be furnished to known suppliers and to any supplier requesting an opportunity to respond. The CSISD web-based e-Bid system will electronically notify registered vendors of applicable bid opportunities. It also allows registered vendors to electronically view and submit bids. Vendors pay no fees for registering or utilizing this e-Bid system. Suppliers can register from the purchasing website. A vendor must be awarded on a CSISD bid or quote or a cooperative contract for which CSISD is a member, to be considered an awarded vendor.

6.5. Competitive Bids over \$50,000 must be presented to and awarded by the Board of Trustees.

6.5 Competitive Sealed Proposals/Request for Proposals procedures are recommended where other procurement procedures are not required according to state or federal rules, laws, or regulations, in order to stimulate competitive prices for services. The competitive sealed proposal process is an alternative to competitive bidding.

6.5.1. This procedure applies to all construction services, maintenance, repair and renovation of a building or material for a renovation project valued over \$50,000 or

more in the aggregate for a twelve (12) month period. Other services that are not compatible to the competitive bidding procedures are to comply with the Competitive Sealed Proposal procedures.

6.5.2. The terms and conditions of competitive sealed proposals are identical to those for competitive bidding except that under competitive sealed proposals changes in the nature of a proposal, and in pricing, may be negotiated after proposals are opened. A Request for Proposals (RFP) is a part of the competitive sealed process. The RFP is the mechanism that generates the receipt of the competitive sealed proposals and should contain as a minimum several key elements:

- Written notice, in the RFP, of the delegation and the extent of the Board's delegation of its contracting authority.
- Relative Weights
- Newspaper advertisement
- Notice to Proposers
- Standard terms and conditions
- Special terms and conditions
- Scope of Work
- Acknowledgement form/response sheet
- Conflict of Interest Questionnaire
- Certification Regarding Debarment and Suspension
- Felony Conviction Notice
- Certificate of Residency
- Contract Clause
- Debarment and EDGAR Certification (Federal funds)
- Proposer/Vendor Certification Form (Federal)
- Certification regarding Terrorist Organizations, Boycott of Israel, Boycott of certain energy companies, Discrimination against Firearm and Ammunition Industries, and Certain Foreign-Owned Companies in connection with critical infrastructure.

6.5.3. A Request for Proposal may also be used as a procurement option to generate a non-sealed competitive proposal, but only for services other than construction services. In this instance, the district may open the proposal upon receipt and begin negotiation process for the offered goods or services.

6.5.5 For all purchases that exceed the Federal Simplified Acquisition Threshold of \$250,000, a cost or price analysis shall be performed for every procurement so that an estimated cost is obtained before issuing a request for bid or purchase order to an approved vendor. Secondly, all purchases that exceed this threshold that are for construction or facility improvement shall comply with federal bonding requirements such as:

- Bid guarantee from each bidder of five percent (5%) of the contract price.
- Performance bond on the part of the contractor for 100% of the contract price.
- Payment bond on the part of the contractor for 100% of the contract price.

6.6. Interlocal Purchases

6.6.1. The district can contract or agree with another local government, including a nonprofit corporation that is created and operated to provide one or more government functions and services, or with the state or a state agency, including the General Services Commission (GSC) to purchase goods and any services reasonably required for the installation, operation, or maintenance of goods. The purpose of an inter-local contract may be to study the feasibility of using an inter-local contract to perform a government function or service, that each party to the contract is authorized to perform individually.

6.6.2. Local governments that are parties to an inter-local contract for the performance of a service may, in performing the service, apply the law applicable to a party as agreed by the parties, (Section 791.012, Government Code).

6.6.3. Requirements for an Interlocal Contract include:

- Authorization by the governing body of each party to the contract
- Statement of the purpose, terms, rights, and duties of the contracting parties
- Specification that each party paying for the performance of governmental functions or services must make those payments from current revenues available to the paying party

6.7. Construction Projects

6.7.1. Contracting and Delivery Procedures for construction projects are governed by Government Code Chapter 2269. In accordance TEC (Section 2269), the district must publish in the request for bids, proposals, or qualifications for construction services the criteria that will be used to evaluate the offers and relative weights, if known at the time of the publication, given to the criteria.

6.7.2. Criteria that may be used to award a construction contract include.

- Cost
- Experience and Reputation
- Quality of Goods and Services
- Impact on ability of District to meet HUB contracting requirements.
- Safety Record
- Proposed Personnel
- Financial Stability
- Other relevant factors

6.7.3 State Approved Procurement Methods for Construction

- Interlocal Contract
- Competitive Bid
- Competitive Sealed Proposal
- Construction Manager at Risk
- Design Build
- Job Order Contracting
- Construction Manager Agent

6.8. Evaluation Procedures

6.8.1. Bid Evaluation Committee Guidelines

Your willingness to participate as an evaluator is an integral part of the procurement process for College Station ISD. The Office of Purchasing, and the Director of Purchasing truly appreciate your assistance and expertise. Your designation as an evaluator for the Director of Purchasing, and as a public servant thereby, requires that you fully understand the policies regarding potential conflicts of interest and the confidential nature of the proposals and all that is contained therein. The following information provides a general overview of evaluations and outlines how the evaluation process is conducted.

6.8.2. Purpose

To provide guidance on the simple, fair, and objective operation of the evaluation committee. Request for Proposal is a best value bid process that includes the receipt of proposals, permits negotiation, and usually affords proposers an opportunity to revise their offers before award of a contract. The evaluation committee is an integral part of the CSISD procurement process.

6.8.3. Competition

The solicitation and selection of (a) qualified company(ies) through the issuance of a Request for Proposal (RFP), Competitive Sealed Proposal (CSP), or Request for Qualifications (RFQ) shall be conducted in a manner so as to provide maximum open and free competition. Professional services (architect, engineer, and land surveyor per TGC 2254) shall not be awarded based on price competition.

6.8.4. Role of the Buyer

- Develop scope of proposal, specifications, and other template updates, as necessary
- Create and maintain the proposal timeline
- Form the evaluation committee: determine committee size and recruit committee members

After the proposal opening:

- Examine each proposal to determine if all mandatory requirements have been met to warrant further evaluation
- Assign someone to check proposers' references by email or phone.
- Score purchase price for each proposer (if applicable)
- Provide supplier responses to committee members.
- Serve as project leader of evaluation committee; send to committee members:
- Brief overview of solicitation process
- Provide instructions for the evaluation process Determine date and time of the evaluation committee meeting
- Compile the final scores; complete Evaluation Summary Form
- If clarifying information is required, arrange for the

- presentation(s), conference call or webinar
- If best and final offer (BAFO) is requested, coordinate the issuance and collection of BAFO correspondence to and from proposers
- Calculate final award(s) based on highest point total
- Present recommendation(s) to the Director of Purchasing or other party as directed
- Ensure that evaluation materials are made part of the solicitation file.

6.8.5. Duties of the Evaluation Committee Member

- Content specific knowledge and/or expertise
- Read and sign the Instructions to Evaluation Committee Members
- Independently score each proposal for each evaluation factor (not already completed by the Project Leader)
- Meet as a group for presentation or discussion, as required
- Adhere to timeline set by Project Leader for completing evaluation(s)
- Maintain confidentiality of the project

6.8.6. Evaluation Committee Membership

The evaluation committee size will be determined on an individual solicitation basis. The committee as a whole will be comprised of 3 to 5 members who have expertise and knowledge in the discipline(s) related to the solicitation. The buyer will serve as the evaluation committee project leader. No person who might have a potential conflict of interest regarding financial interests or prejudice through current or past association or relationship with a proposal offeror should serve on the evaluation team. The committee will be formed as follows:

- Three (3) CSISD staff with knowledge and expertise in the discipline(s) related to the project.
- Optional: One (1) Director/Manager from within CSISD.
- Optional: One (1) or more CSISD consultants

6.8.7. Evaluation Methods

The objective is to select the company(ies) or individual(s) that can best provide the goods/services when technical ability, price and other factors have been considered. Proposals shall be evaluated and ranked solely on the basis of criteria contained in the solicitation. Oral presentations, although not mandatory, may be conducted with short-listed companies during the evaluation process and taken into consideration in the final evaluation.

There are two methods of evaluating proposals, the consensus (or narrative) method and the numerical scoring method.

The **consensus method** is a process where the committee as a whole arrives at a common understanding of ranking the offers. It

usually does not involve numerical scoring but consists of a narrative appraisal of significant strengths, weaknesses and risks of each proposal.

In the **numerical scoring method**, each member individually evaluates each proposal received based on the evaluation criteria listed in the proposal and the pre-established weighted values, and computes the total score assigned each proposal.

As a rule, pricing information will be submitted together with all other elements of the proposal. In selected instances, the buyer may determine it is in CSISD's best interest to have cost/price information physically separated so that the technical evaluation can be performed separately from price evaluation and thereby not allow for cost/price to influence the technical evaluation.

6.8.8. Evaluation Committee Function

The project leader will determine if the consensus method or numerical scoring method will be utilized. If the consensus method is chosen, a committee consensus report will be prepared identifying the strengths, weaknesses, and risks of each proposal. Individual committee member narrative evaluations are not necessary but may be prepared if it best serves the procurement process. The buyer is responsible for the report and to ensure the evaluation process is accomplished correctly.

When the consensus method of evaluation is used, individual evaluation score sheet from by each committee member may or may not be utilized. One score sheet for the entire committee will suffice.

When the numerical scoring method of evaluation is used, individual score sheets are obtained from each member in evaluating the proposals. Members evaluate the proposals and fill out the score sheet. The score is then totaled, and the buyer will prepare the summary. If an individual evaluation score varies 25% or more from the average scores of the total evaluation committee on any specific proposal, it shall be subject to review by the evaluation committee. The purpose of the review is to discover the specific deficiency or significant characteristic that the evaluator considered to be of such magnitude that, when evaluated further by the entire committee, could change the scores of the committee or the individual evaluator. Should an evaluation be reviewed, it shall be documented and retained in the contract file. During the review session, evaluators are encouraged to communicate amongst themselves to glean any and all information that will assist in ranking the proposals and making a selection.

A committee meeting is held to verify the scores.

The committee may

- accept
- reject
- elect to hold oral presentations
- forgo oral presentations
- decide how many proposers are in the competitive range
- send a recommendation to the Director of Purchasing and the CSISD Board of Trustees.

6.8.9. Presentations – Oral, Conference Call or Webinar

The evaluation committee may conduct a presentation by proposers in the competitive range. If, in the committee's opinion, no useful purpose will be served by conducting a presentation, it may be waived.

If the best value selection method is utilized, oral presentations are especially important. The purpose of such presentations shall be to determine in greater detail such proposer's qualifications and explore with the proposer the scope and nature of the required goods/services, the proposer's proposed method of performance, and the relative utility of alternative methods of approach.

The buyer will issue each individual or company selected for oral presentations a written notice of their selection and an invitation to meet with the evaluation committee for a briefing/presentation on their proposal. The notice will also establish a time, date, and location to give the oral presentation.

6.8.10. Confidentiality

The evaluation committee shall not disclose any information derived from proposals submitted by other proposers and shall not disclose any information contained in any proposals until after award of the proposed contract has been made. All committee members shall immediately report all inappropriate contacts regarding the evaluation proceedings to the buyer or Director of Purchasing.

6.8.11. Negotiations

Negotiation, in the sense of discussion, persuasion, alteration of initial assumptions and positions, and give-and-take, may apply to price, scheduling, technical requirements, or other terms of a proposed contract.

The competitive range/short list will be composed of all companies whose proposals have a reasonable chance of being selected for award, i.e., capable of being made acceptable through minor modification to the proposal.

The buyer will be responsible for conducting the negotiations. If a negotiation team is formed, then the buyer will be the team leader. The content and extent of the discussions is based on the particular facts of each acquisition:

1. Making certain that the offeror has a clear understanding of the scope of the work, specifically the essential requirements involved in providing required goods/services,
2. Determining that the offeror will make available the necessary personnel and facilities to perform the services within the required time, and
3. Agreeing upon compensation, which is fair and reasonable, taking into account the estimated value of the required goods/services and the scope, complexity, and nature of such goods/services.

The proposer will be advised of deficiencies in its proposal and will be given an opportunity to conform the proposal to CSISD's requirements. Any uncertainties concerning the technical proposal and other terms and conditions of the proposal will be resolved. Suspected proposal mistakes are to be called to the proposer's attention being specific as possible without disclosing information concerning other proposals or the evaluation process. Proposers will be provided a reasonable opportunity to submit any cost or price, technical, or other revisions to their proposals that may result from discussions.

The negotiation team members and other CSISD personnel involved shall not engage in:

1. Technical leveling (i.e., helping an offeror bring its proposal up to the level of other proposals through successive rounds of discussion, by pointing out weaknesses resulting from the proposer's lack of diligence, competence, or inventiveness in preparing the proposal).
2. Disclosure of any information pertaining to another proposal that results in improvement of a competing proposal, or
3. Auction techniques, such as:
 - A. Indicating to an offeror a cost or price that it must meet to obtain further consideration,
 - B. Advising an offeror of its price standing relative to another offeror. However, it is permissible to inform an offeror that its cost or price is considered to be too high or unrealistic.
 - C. Otherwise furnishing information about other proposals.

If the buyer or Director of Purchasing determine that a proposal no longer has a reasonable chance of being selected for contract

award, it will no longer be considered for selection.

6.8.12. Best and Final Offers (BAFOs)

Upon completion of discussions, the buyer may issue to all proposers still within the competitive range a request for best and final offers. The request shall include:

1. Notice that discussions are concluded,
2. Notice that this is the opportunity to submit a best and final offer,
3. A common cutoff date and time that allows a reasonable opportunity for submission of written best and final offers, and
4. Notice that if any modification is submitted, it must be received by the date and time specified and is subject to the late submissions, modifications, and withdrawals of proposals provision of the solicitation.

After receipt of best and final offers, the negotiation team should not reopen discussions unless it is clearly in CSISD's interest to do so. If discussions are reopened, following evaluation of the BAFOs, the evaluation committee shall recommend that source whose BAFO offer is most advantageous to CSISD, consistent with the established evaluation factors. While the lowest price or lowest total cost to CSISD is an important factor in many source selections, in many solicitations CSISD may select the company whose proposal offers the greatest value to CSISD in terms of performance and other factors.

6.8.13. Committee Recommendation(s) to Director

After validation of qualifications, evaluation, and presentations, the evaluation committee shall select a company or companies, in the order of their respective qualification ranking, deemed to be the most highly qualified to provide required goods/ services.

There may be further discussion between the Director of Purchasing and the evaluation committee members before the committee's recommendation is finalized and sent to the CSISD Board of Trustees for contract award.

6.8.14. Cancellation of Proposal

Solicitations are subject to cancellation if they prove not to be feasible for reasons such as, but not limited to, a fair and reasonable contract cannot be negotiated.

6.8.15. Debriefing of Unsuccessful Proposers (If used)

Debriefings for non-awarded proposers may be conducted by the buyer. The primary purpose of a debriefing is to provide information so that an unsuccessful proposer can improve in the event of similar future procurements.

6.8.16. Comparisons with other unsuccessful proposals are not permitted.

At the onset of the debriefing, the CSISD representative shall state to the company being debriefed that "No other proposal shall be discussed as we would not discuss your proposal with any other company." The debriefing shall only deal in specifics related to the company being debriefed.

6.8.17. IonWave (e-bidding) Evaluation Process

All invited evaluators will receive an evaluation invitation by email.

- The evaluators must click on the "click here" link in the evaluation invitation email.
- When evaluator clicks on the "click here" link if they have not already registered, they must first register. Once registered they will go back to the email and click on the "click here" link to sign in. (Note: If you are already register then you would skip this process and just log in by clicking on the click here link).
- Once the evaluator logs in, they will read the Confidentiality Agreement for Membership on Cross-Functional and Proposal Evaluation Team and Instructions For Evaluators (see verbiage below). Once complete they type their name and check the "I agree to the evaluation terms above" box under the Terms of the Evaluation.
- Then the evaluator will click on the "Scoring Tab" and click on each supplier, then click on "Criteria Score" button to see the supplier response and perform the evaluation to score the supplier. An optional comment field is available for each criterion. (Note: when entering your response, you must click on the "save" button for each response for the system to save the response).
- Once the evaluator has completed everything that needs to be filled out for each supplier, they will click on done, this will then bring you to the available suppliers to be evaluated screen.

- From here the "Submit" tool button will be illuminated and available for selection (note: if something is left out that needs to be completed then you cannot click the "Submit" tool button as it will not be illuminated.

- Once you click the "Submit" button your scores will be submitted, and the evaluation has been completed.

7. EXCEPTIONS TO COMPETITIVE PURCHASING REQUIREMENTS

7.1. Without complying with the competitive procurement options set forth in 6.2, the district may:

7.1.1. Contract for professional services such as architects, engineering, land surveying, CPAs, attorneys, and fiscal agents. In lieu of methods provided by Texas Ed. Code 44.03 the district may contract for professional services rendered by a financial consultant or technology consultant.

7.1.2. Contract for the replacement or repair of the facilities or equipment destroyed or severely damaged if the Board of Trustees determines that the delay imposed by the competitive procurement process would prevent or substantially impair the conduct of classes or other essential school activities; or

7.1.3. Purchase an item that is available from a single source, including:

- An item for which competition is precluded because of the existence of a patent, copyright, secret process, or monopoly.
- A film, manuscript, or book.
- A utility service, i.e. electricity, gas, or water;
- A captive replacement part or component for equipment.

7.2. Selected purchases may be exempt from competitive procurement if they meet established criteria for a sole source purchase:

7.2.1. The Purchasing Department will make the final determination if the purchase is a sole source.

7.2.2. Identification and confirmation that competition in providing the item or product to be purchased is precluded by the existence of a patent, copyright, secret process, or monopoly.

- 7.2.3. Sole source does not apply to mainframe data-processing equipment and peripheral attachments with a single item purchase in excess of \$15,000.

It is important for the district to maintain and retain documentation from the vendor, which clearly delineates the reasons, which qualify the purchase to be on a sole source basis. It is important to verify a vendor's claim of having a sole source product.

8. VENDOR SELECTION/RELATIONS

8.1. Vendor relations

8.1.1. It is district policy to maintain and practice the highest possible standards of business ethics, professional courtesy, and competence in all our dealings. At all times, applicable laws must scrupulously be observed. In this regard, all employees should observe the following when dealing with suppliers and/or their representatives:

- To give prompt and courteous reception, as well as fair and equal treatment, to all suppliers and their representatives,
- Provide equal opportunity for all suppliers including small, minority, woman-owned, or labor surplus area firms to offer price quotes and products,
- Guarantee the confidentiality of all price quotations made by vendors,
- Explain as clearly and fully as possible to suppliers the reason for any rejections of prices and/or quotes provided,
- Remain scrupulously free from obligations to any supplier,
- Keep informed about sources of supply, current methods, services, and material; encourage their testing of new product samples,
- If, for any reason, one vendor is permitted to re-quote, his competitors will be given the same opportunity. Re-quoting should be restricted to an absolute minimum.

8.2. Vendor Award Criteria

8.2.1. The general practice of the district shall be to accept the lowest responsible bid or the most advantageous or best value

proposal for the district as specified. In determining the lowest responsible bid or most advantageous or best value proposal for the district, the district is not restricted to considering price alone but shall consider other factors stated in the selection criteria.

If the District receives two or more quotes or bids from responsible bidders that are identical in amount, as the lowest and best bid, the district shall select only one bidder based on prior experience with vendors.

8.2.2. Criteria

- In awarding a contract, bid, and/or a quotation the district shall consider:
- Purchase Price;
- Reputation of Vendor and of the Vendor's goods or services;
- Quality of Vendor's goods and services;
- The extent to which the goods or services meet the district's needs
- Vendor's past relations with District
- The impact on the ability of District to comply with laws related to Historically Underutilized businesses (HUB) including small, minority, woman-owned, or labor surplus area firms
- Long term cost to District to acquire goods or services
- For a contract for goods and services, other than goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, whether the vendor or the vendor's ultimate parent company or majority owner:*
 - A. has its principal place of business in this state; or
 - B. employs at least 500 persons in this state;
- Any other relevant factor that a private business entity would consider in selecting a vendor.

*This criteria cannot be used for federally funded purchases.

8.3. Vendor Visitations

8.3.1. Sales calls and demonstration solicitors shall not call an individual campus/department without prior appointment and approval from the Purchasing Department. Such approval may be granted to demonstrate any material, supplies, equipment, software or hardware for possible use in the district.

8.4. Vendor Performance Evaluations

8.4.1. The procedures are as follows:

- The Purchasing Department and Business Office personnel deal with vendors on a continuous basis. It is important that information be recorded about specific performance of all vendors.
- The Purchasing Director welcomes any useful and constructive evaluations from departments. This information will be useful for the Purchasing Department to monitor and effectively stimulate vendor activities and performance.

9. RECEIVING AND DISTRIBUTION

9.1. The procedures are as follows:

- 9.1.1. The originator will initiate a purchase requisition in eFinance.
- 9.1.2. The Purchasing Dept. will convert the requisition to a purchase order and forward to Purchasing Director for approval and signature if over \$500.
- 9.1.3. Purchasing will send the purchase order to the vendor.
- 9.1.4. Orders will be delivered to the District Warehouse.
- 9.1.5. The Vendor will mail an invoice to Business Office/Accounts Payable.
- 9.1.6. The Warehouse will deliver the shipment to the campus/department and obtain signature on delivery.
- 9.1.7. The Originator must indicate what items were delivered in relationship to the original purchase order. When the complete order is received the originator must notify the campus/department secretary to sign the green copy of the purchase order which must be forwarded the Business Office/Accounts Payable.

10. TRANSFER AND DISPOSITION OF PERSONAL PROPERTY

10.1 Transfer and Storage of Surplus

- 10.1.1. When a campus or department considers an item to be of no further benefit or is not being used, arrangements for the transfer and storage of this specific item will proceed as follows:
- 10.1.2. Each campus/department must fill out a Fixed Asset Deletion Form and must be signed by the campus/department head. The completed form must be submitted to the Purchasing Department.
- 10.1.3. To have the surplus items picked up by the Warehouse a work order request must be submitted.
- 10.1.4. Once the work order is received the campus/department will be notified by the Warehouse as to the date and time the surplus or salvage property will be picked up. The removal of any surplus or salvage will depend on availability of space in the district warehouse.
- 10.1.5. Surplus property in usable condition will be made available to any campus/department that is in need. Please call the Warehouse for an inventory of available surplus or visit the Purchasing Department.

10.2 Disposition of Surplus Personal Property

- 10.2.1. The Superintendent or designee is responsible for the implementation of this procedure. Every department will be given an opportunity to look at usable personal property before being removed from the inventory and declared surplus. Once the personal property has been declared surplus for sale this personal property cannot be picked up, delivered, exchanged, or used by any other campus or department in the district.
- 10.2.2. When property is determined by the Purchasing Director to be surplus/salvage, is no longer needed, is in unusable or unsafe condition, it shall be disposed of as outlined below. Items purchased by Federal Funds or Grant Funds shall be handled in accordance with their respective regulations. The originating department must follow the following procedure:

- The originator must complete a Fixed Asset Deletion Form and send a copy to the Purchasing Department.
- The Purchasing Director or designee will inspect the property and will make a determination on the nature of the surplus property.
- To have the surplus items picked up by the Warehouse a work order request must be submitted.
- On the recommendation of the Purchasing Director, the property will be declared surplus and authorize disposal of the property.
- For fixed items with an original value over \$5,000 and the Purchasing Department will forward a copy of the Fixed Asset Deletion form to the Business Office, which will remove the property from the fixed asset inventory.

10.2.3. Disposal will be as follows:

- Online Auction
 - The property will be turned over to an approved auctioneer. The auctioneer will be responsible for following established State of Texas law for the advertisement, soliciting and bidding of property.
 - The Auctioneer will auction the property after publication, as per law.
 - Should items fail to be sold by the auctioneer, the Purchasing Director or designee, at his/her own discretion may dispose of the personal property in any manner that is in the best interest of the district.
- Sealed Bid
 - After advertisement in a newspaper of general circulation at least one week prior to the closing of bids.
 - In the event that two or more bids are identical, the awarding bid shall be determined by drawing of lots or by a public auction after publication.

- Recycling
 - Surplus or salvage technology equipment is picked up by a contracted certified electronic recycler.
 - The contracted recycler will issue a Certificate of Destruction to the district once items are received and processed.

- 10.2.4. All auction sales will be handled by credit card and all proceeds will be given to the Business Office and deposited in the General Fund with the giving and receiving of receipts thereof.

- 10.2.5. Should either Sealed Bids or Auction fail to result in the disposal of the property, the Superintendent or designee may, at his or her discretion, dispose of the property in a manner that is in the best interest of the District.

- 10.2.6. Trade-Ins- items that are beyond repair, no longer of use, or surplus may be traded-in on more useful like items. The Purchasing Director will make the determination.

- 10.2.7. In all cases where personal property is declared surplus, it shall be removed from the District Inventory by the Purchasing Department when disposed of and proper notation made showing the price realized for said property. Since title to all personal property is vested to College Station I.S.D., no property may be sold, traded, or disposed of other than by sealed bid or auction with the following exceptions:
 - Scrap building materials, and scrap metal
 - Parts of equipment that cannot be used or identified.

10.2.8. In such cases, the Purchasing Director shall inspect the personal property and declare them scrap, making a written notation for the record of the nature of the item(s), the reason for disposal, and the date of disposal. Such records shall be kept for at least three years.

- Relocation of Capital Equipment
- The Purchasing Department must coordinate the movement of furniture and equipment from department to department or facility. Each department or campus must complete a Fixed Asset Transfer Form and submit the original form to the Purchasing Department for approval. A work order request must be entered to have the items transferred.
- All requests to move computer equipment and/or peripherals must be approved by the Director of Technology. The computer equipment must be unhooked, and all cables must be attached to each respective peripheral.