

PURCHASING GUIDE

Purchasing Guide by Dollar Amount	
When making any purchase you should always attempt to use an Approved Vendor First	
< \$10,000	If no approved source exists, you may select the most economical source and proceed. If an approved source exists, you must attach quotes or an explanation for selecting a non-approved source. 2CFR200.320
\$10,000 - \$49,999	If using an unapproved vendor, three written quotes must be provided. Depending upon the type of purchase, a formal RFP may be required at the discretion on the Director of Purchasing.
> \$50,000	Requires a formal bid process and requires approval from the Board.

Finding a Vendor

Step 1: Look at appropriate Bid Tabulation.

- Listed on PfISD Website (not Intranet) under Departments -> Purchasing -> Current Contracts.
- If the item you are purchasing is specifically listed in the Bid Tab, purchase from the Vendor to whom the item was awarded as they submitted the lowest bid.
- If the item is not listed in the Bid Tab, you may use any approved vendor for that bid (usually highlighted at top of Bid Tab).

Step 2: If no bid tabulation is posted go to the Approved Vendor List.

- Approved Vendor List is posted on the PfISD website under Departments -> Purchasing -> Approved Vendor List.
- Vendors are grouped by bid number with each entry showing Bid Number, Bid Name, Awarded Date, Expiration Date, Vendor Number, and Vendor Name. To search for a specific vendor, use the "control F" function and type the vendor's name. Please note that this list is updated periodically so occasionally an expired bid may still be listed and a newly awarded bid may not yet be added.

Entering a Purchase Request or Payment Voucher in Skyward

You currently have the ability to enter several types of purchases in Skyward:

- **Standard Purchase Request** (This type of PO contains one or more-line items for specific dollar amounts and quantities. It is received and released in Skyward for payment by quantity.) **These would include Amazon, Instrument purchases (fixed assets of 5K or more), purchases with less than 20-line items. Unless there is a “Not to exceed” ex. Unknown specifics: Home Depot, Costco, HEB.**
- **Blanket Purchase Request** (This type of PO is an “open” PO that usually will have multiple delivery dates and partial payments. Partial payments will be made by dollar amount by notifying the Accounts Payable department.) **This is OK if there are 20+line items (must have detailed list attached) This would be for HEB, Costco, Home Depot, etc. (with description of what is being purchased) Library books (with detailed list), Fine Arts (ex. Scripts and sheet music).**
- **P-Card Purchase Request** (This type of PO is used ONLY for purchases being made with the District credit card.)
- **Invoice Request** (This is used for any purchases that have already been made and for expenses such as registrations, field trips, reimbursements, etc.).
- **Warehouse Request** (This is used to order directly from the District Warehouse).

Please refer to your Skyward Business System Training Guide for detailed information on how to enter Purchase Requests and use the Skyward Finance System.

THINGS TO REMEMBER:

1. Try to use an approved vendor at all times.
2. You may use an unapproved vendor for purchases under \$10,000 **if no approved source exists.**
3. If you spend over \$10,000 and are using an unapproved vendor, you must provide 3 quotes. These quotes must be attached in Skyward before we can approve your Requisition.
4. Requisitions over \$5,000 will go to Deputy Superintendent and over \$25,000 will go to the Superintendent and Director of Purchasing for approval. Purchases over \$50,000 must be approved by the School Board, unless a formal bid process has occurred.
5. If **Title** funds or **SCE funds** are being expended, the requisition must include a reference to the Campus Improvement Plan (CIP): Goal #, Performance Objective #, and Strategy #. The reference can appear in the Item Description/Description of Services, or in the Comments Section. The expenditure will not be approved if this reference is not included. (**Example:** When entering a requisition to register teachers for a conference, you might refer to Goal 1, Perf. Obj. 1, Strategy 7, where Goal 1 is “Each student will be fully prepared to reach his/her potential; Perf. Obj. 1 is “Campus will meet the needs of all students through high quality classroom instruction and varied interventions...”; and Strategy 7 is “Provide additional and ongoing training to all staff in effective instructional practices...”) The State and Federal Programs Department will verify the information in the Campus Improvement Plan based on the Goal, Performance Objective, and Strategy referenced. Central office expenditures utilizing Title or SCE funds must reference the District Improvement Plan (DIP) in the same manner as exemplified above for the CIP.
6. If you are buying something out of pocket and want to be reimbursed, the purchase must have a Pre-Approval for Reimbursement Form that has been approved before you make

the purchase. The approved form and the receipt must be scanned in and attached to your Payment Voucher / Invoice in Skyward in order to be reimbursed.

7. When submitting a Not-To-Exceed Requisition, a list of items to be purchased must be included. The Requisition will not be approved without this list. You may include it on the Requisition under Item Description or attach the list in the Files box of your Purchase Request in Skyward. A common example is Office Depot orders or orders that include more than a page of specific items. Do not include any items requiring tech approval in any itemized list. (keyboards, monitors, printers, etc.) These items must be listed individually on the requisition.
8. Just because a Vendor is Active in the Skyward Finance System, it **does not** make them an Approved Vendor.
9. Procurement by noncompetitive proposal - Procurement through solicitation of a proposal from only one source "**Sole-Source**," may only be used when one or more of the following circumstances apply:
 - a. The item is available only from a single source;
 - b. The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation;
 - c. The Federal awarding agency or pass-through entity expressly authorizes noncompetitive proposals in response to a written request from PflSD; or
 - d. After solicitation of a number of sources, competition is determined inadequate.

If a vendor is determined to be the sole provider of the product or service, a signed and dated Sole-Source Letter must be provided to us. Sole-Source letters are only good for one-year. You must obtain a current letter if the one on file has expired.

PflSD must receive approval for "sole-source" designation from TEA.

10. Adding Vendors - Forms to add a vendor can be found on the Purchasing website in the Information for Employees section. All forms must be completed and returned along with a W9 from the vendor. If the vendor is an individual, you must send HR approval with forms.
11. Contracted Service Providers – must complete the vendor application packet and return the completed packet along with the contract for services to the originator of the service request. If the contract is to be paid with Federal funds, it must first be approved by the Federal and State Programs Director. Then, the contract shall be reviewed and approved in accordance with the district guidelines for all non-grant funds. The purchasing department will verify if HR approval, quotes, and/or a bid process are required prior to approval of the contract.
12. We have what we call "**The 10% Rule**" on amounts exceeding the Approved PO amount. What this means is, if for some reason a product you ordered is more than what you thought or the shipping is higher than what was estimated then you can increase the Approved PO amount by no more than 10% of the original PO amount. **This Does Not apply to PO's that have had previous Board Approval.** If that is the case then they would have to go back and be reviewed and approved again by the Board for the higher amount.

IF YOU HAVE ANY QUESTIONS OR NEED ADDITIONAL HELP, PLEASE FEEL FREE TO CONTACT US.

For Food Service, Technology, or Athletics questions contact:
JANIE ORNELAS, Assistant Director of Purchasing – 512-594-0074
Guadalupe.ornelas@pfisd.net

For Secondary Schools and Fine Arts questions contact:
TAMARA BERDING, Buyer– 512-594-0072
Tamara.berding@pfisd.net

For Elementary School, Support Services, or Furniture questions contact:
NICOLE AYER, Buyer – 512-594-0075
Nicole.ayer@pfisd.net

For Admin., EDP, CTE, or SPED questions contact:
SYLVIA D. TAPPIN, Buyer – 512-594-0089
Sylvia.tappin@pfisd.net

Frequently Asked Questions – Purchasing

1. How do I find purchasing related information?

Purchasing related information can be found on the district's website and on the Intranet. Warehouse order information and links to both vehicle rentals and Office Depot can be found on the district's intranet site under Purchasing. Bid tabulations, purchasing forms, and an Approved Vendor List can be found on the district's website (www.pfisd.net).

If you have questions or need assistance in any way, please contact any member of the purchasing department. We will be glad to assist.

2. How to find the Approved Vendor list.

To locate the approved vendor list, go to the main page of the Pflugerville ISD website. Click on **Departments, Purchasing, Information for Employees**, and choose **Approved Vendor List**. You can search by bid category or vendor name. All approved vendors (both PfISD Bid Approved and Co-op) are listed. If you cannot locate the vendor you are looking for call the Purchasing Department.

3. If an approved source is more expensive than a non-approved source, do we have to use the approved source?

Not always. However, we do have to treat vendors fairly. You should not approach an unapproved vendor and ask if they can beat a certain price. The appropriate method is to ask each vendor for the best price they can give you and then submit those quotes along with the purchase order.

4. Can we buy from vendors at conventions?

If you are using a purchase order, and the purchase is less than \$1000, you can. If you are going to use a pay request, you must follow the guidelines specific to use of a pay request.

5. Why are reimbursements only allowed to be used with approved vendors?

Because, according to Texas law, the purchase order is the prescribed manner of doing business. Use of the purchase order ensures that the funds have been set aside for that particular purchase and that all relevant legal guidelines and board policies have been met. When you use a reimbursement, there is no way to ensure that the funds have been set aside, or that legal guidelines and board policies have been met.

6. Why do we have to use approved vendors?

Texas law and Board policy require us to use approved vendors whenever possible. Approved vendors have provided all legally required paperwork and have agreed to do business in the manner required by the district's Board of Trustees. For example, you may need to make a \$120 office supply purchase. On the surface, this seems like an insignificant matter. However, Texas law requires school districts to conduct formal bids for all categories of products that exceed \$50,000 in *aggregate* in one school year. Last year, the district has spent approximately \$400,000 for office supplies. Frequent purchases made through unapproved vendors do not follow Board policy and is also illegal. The State of Texas can levy fines on the district and prosecute responsible persons for Texas purchasing law violations.

7. When approved vendors don't have the exact item we want; can we purchase it from an unapproved vendor?

If an approved vendor has a comparable item, you should use the approved vendor. (For example, same item but different brand.) If you are unable to use the item from the approved vendor, attach an explanation for selecting a non-approved source to your Requisition.

Pflugerville ISD
Executive Summary of Local Purchasing Procedures

To ensure that the District is legally compliant and within the limitations set by Board policy, the following purchasing procedures are also enforced.

When the District seeks to purchase personal property of a value of at least \$1,000 but less than \$50,000, in the aggregate, for a 12-month period, the District must obtain at least 3 written quotes from a list of vendors maintained by the Purchasing Department.

Deputy Superintendent approves all purchase orders of a value that are between \$5,000-\$24,999.

Superintendent approves all purchase orders of value that are more than \$25,000.

When the District seeks to purchase personal property of a value less than \$1,000, the most economical source will be sought.

Levels of Review and Approval Required for Contracts and Purchase Orders

Amount of P.O. or Contract	Budget Manager	Purchasing Coordinator	Deputy Superintendent	Superintendent	Board of Trustees
\$0-\$4,999.99	✓	✓			
\$5,000 - \$24,999	✓	✓	✓		
\$25,000 - \$49,999	✓	✓		✓	
\$50,000 +	✓	✓		✓	✓

The amounts listed above represent the total dollar volume of purchases for a related class of items, in the aggregate, for a 12-month period (usually the fiscal year). It is in violation of State law to submit separate and sequential purchase orders to avoid the competitive bid process.

If additional unanticipated purchases are made requiring a higher level of approval, competitive bidding and/or Board approval (when applicable) will be secured as soon as possible.

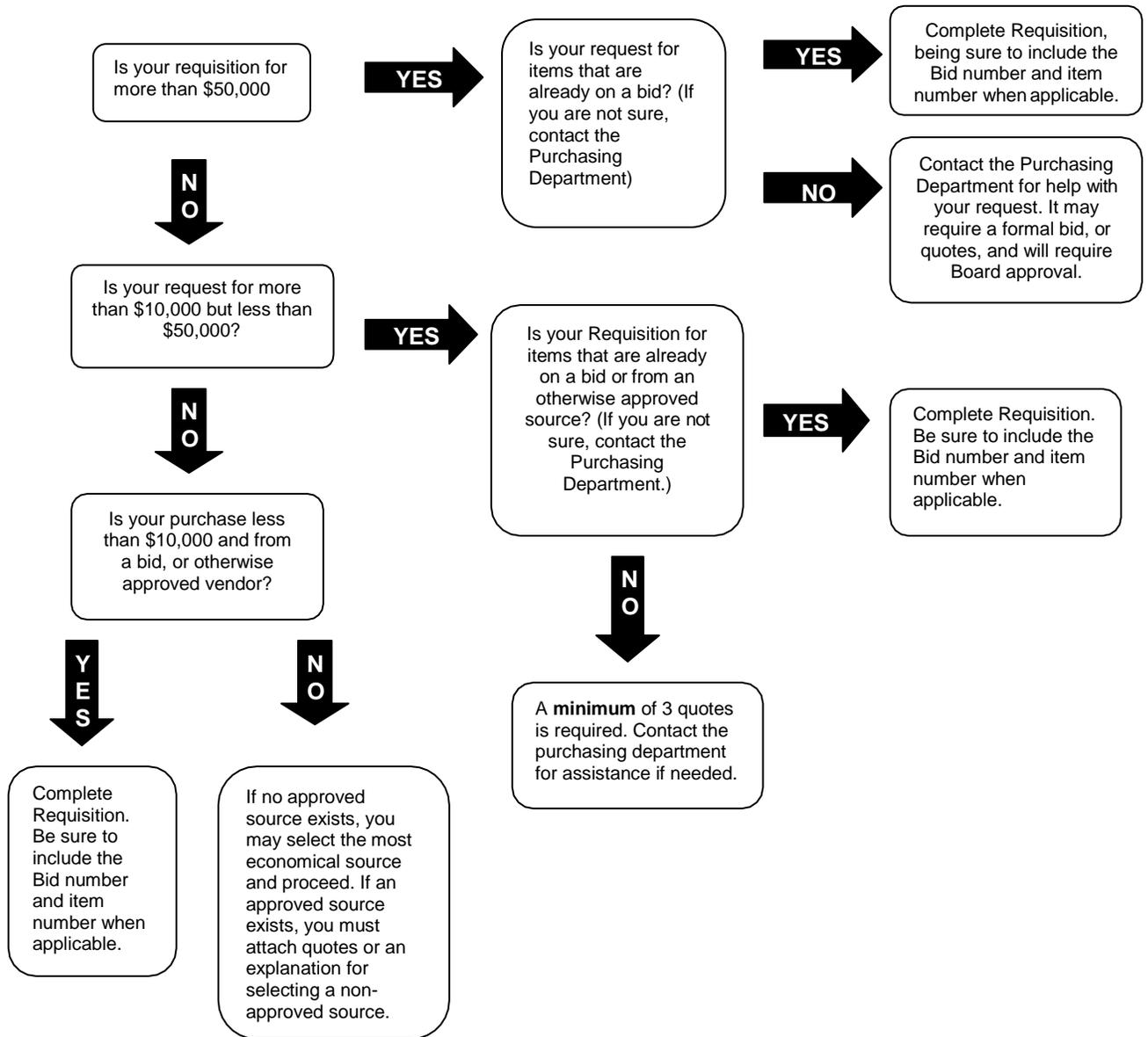
Any employee of the district entering into a contract for goods or services must immediately forward the contract to the Purchasing Department for evaluation and approval. They will provide support and direction, and facilitate consultation with legal counsel if necessary. Except as noted below, all district contracts will be signed by the Superintendent or Deputy/Assistant Superintendent when acting as designee. All original district contracts are maintained by the Purchasing Department.

Principals, Directors, and Executive Directors may sign contracts or agreements with certain companies providing student services such as yearbooks, senior rings, graduation invitations or school photographs.

Frequently Used Vendors

1. **Amazon** – Make sure you process quickly; Amazon price is only guaranteed for 5 days including Saturday and Sunday.
2. **Costco** – Must have approved PO and PfISD ID with you at time of purchase.
(Cannot do online ordering)
3. **Apple** – **V#3268 for all purchases. V#7879 to be used for iTunes vouchers or can use V#3268. (Do not use V#3272 – Apple Store (in The Domain) - not on DIR Contract.)**
4. **Barnes & Noble** – Use PO number and call store #7875, if items need to be ordered they order them for us. Remember to leave contact information for orders to be picked-up.
5. **Best Buy** – Two Vendors:
09292-**Unapproved**- Local store for purchases under \$50 **only**.
Will not accept PO's.
09299- BestBuy.gov – Approved through a government Co-op.
Must call 612-292-0268 or email: Jeremy at Jeremy.como@bestbuy.com for quote. Enter PO then contact Jeremy again with PO # and where you would like to make pick up. Orders can also be delivered to your campus.
6. **Dell**- V#18163 Dell Marketing – Use for all purchases. All PO's must reference an e-quote number which is acquired through the Dell Premier Website. Please see your bookkeeper for further information.
7. **HEB** – V#10245 - Enter a PO. Take HEB card and if the PO to the store to make purchase.
8. **Home Depot** – Three vendor numbers. Each campus has a card. Please use the number that corresponds with your campus card as listed below:
V#29402 – for cards ending in 0599
V#29398 – for cards ending in 4098
V#29399 – for cards ending in 4106
Check with your bookkeeper if you are unsure of which to use.
9. **Hobby Lobby** – Enter a PO and pick up Hobby Lobby card from Accounts Payable Department. Take both to the store to make a purchase.
10. **Office Depot** – You can order online, but **all online orders must be over \$50**. Each campus has a card. If you are going to the store, you need campus card and PO (PO not required under \$50.00, but need pre-authorization form to send to finance w/receipt & voucher)
11. **Target** – Not approved and will no longer accept Purchase Orders.
12. **Walmart**- Not approved- Purchases over \$10,000 require quotes. Must pick up card from Accounts Payable and take PO and card to service desk and set up an account for every person that makes a purchase. **Cannot use online ordering with Walmart.com.**

PURCHASE ORDER DECISIONS



Cheat Sheet for Amazon

PfISD only allows bookkeepers to have an Amazon account, since they are the ones that have access to the budget and place orders. Other PfISD employees can go into Amazon, create a list, and share your list with your bookkeeper. The bookkeeper can then place your order.

Here is what you do:

Go to Amazon: <https://www.amazon.com/>

- Start shopping
- Pick what you want to order, but **don't hit Add to Cart**. Instead, go below that and click **"Add to List"**. (If you are buying books, make sure and select what option you want, such as hardback, paperback, or audio before you add it to the list, that way when it gets to the bookkeeper they don't have to contact you again to ask what you want)
- Continue adding items to your list
- When you are done selecting your item(s), click on **"View Your List"**
- Above the first item below shopping list there is "Share", click **"Share"**
- It will bring up a box and give you two options Buy Only or Edit & Buy, choose **Edit & Buy**.
- In the box under Edit & Buy – Search for People. Type your bookkeeper's name and their email pops up. Click on it and it's added in the box.
- Then you click Save and it sends an email to your bookkeeper. The email informs them a list has been shared. Bookkeepers will open the email and click the orange box **"View List"** and add the list to your cart.
- The bookkeeper needs to click on **"Add to Cart" for each individual item**. **DO NOT CLICK ON ADD ALL TO CART**. You want to **individually "Add to Cart"** in case there are different delivery options on some items.
- Bookkeeper should do a "Screen-Shot" of the list as soon as the email arrives, to add to the PO, because if they have other lists coming they might all get added together.