SOUTH TEXAS ISD
PURCHASING THRESHOLDS & REQUIREMENTS

Purchase Amount	Support Required	Additional Info	RFP/RFQ	Board Approval
Local Funds				
Purchases up to $50,000 (Approved Vendor)	1 QUOTE Approved Vendor Purchasing Coop Contract	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED
Purchase over $50,000 (Approved Vendor)	1 QUOTE Approved Vendor Purchasing Coop Contract	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED
Purchase of $1,000 - $50,000 (Unapproved Vendor)	3 QUOTES	DISTRICT QUOTE FORM (DOCUSIGN)	NOT REQUIRED	NOT REQUIRED
Purchase over $50,000 (Unapproved Vendor) state rule applies	FORMAL BIDS (Education Code 44. 031) EDGAR	TABULATION Cost/Price Analysis (Federal)	REQUIRED	REQUIRED
Federal Funds				
Purchases up to $10,000 (Approved Vendor)	1 QUOTE Approved Vendor Purchasing Coop Contract	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED
Purchase of $10,000.01 - $50,000 (Approved Vendor)	3 QUOTES Approved Vendor Purchasing Coop Contract	DISTRICT QUOTE FORM (DOCUSIGN) * Federal Factors CIP & DIP	NOT REQUIRED	NOT REQUIRED
Purchase over $50,000 (Approved Vendor)	3 QUOTES Approved Vendor Purchasing Coop Contract	DISTRICT QUOTE FORM (DOCUSIGN) * Federal Factors CIP & DIP	NOT REQUIRED	NOT REQUIRED
Purchase of $1,000 - $10,000 (Unapproved Vendor)	3 QUOTES	DISTRICT QUOTE FORM (DOCUSIGN) * Federal Factors CIP & DIP	NOT REQUIRED	NOT REQUIRED
Purchase over $50,000 (Unapproved Vendor) state rule applies	FORMAL BIDS (Education Code 44. 031) EDGAR	TABULATION Cost/Price Analysis (Federal)	REQUIRED	REQUIRED
Sole Source	1 QUOTE NOTARIZED SOLE SOURCE LETTER	TEA APPROVAL DUE DILIGENCE OF RESEARCH THAT SHOWS THERE IS NO ITEM LIKE THEM	NOT REQUIRED	NOT REQUIRED

*Federal factors: Reasonable, Necessary, Allowable, Allocable (EDGAR Justification)

**Purchase that exceeds $50,000 per item requires board approval

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South Texas ISD - Cooperatives and Contracts

The bid number field must have the coop and contract number on every requisition

Purchasing cooperative/category	Bid Number Field (coop & contract #)	Notes
791 Purchasing Cooperative	791	Enter valid contract number
BuyBoard	Buyboard	Enter valid contract number
Choice Partners	CP	Enter valid contract number
Department of Information Resources	DIR	Enter valid contract number
Equalis Group	EG	Enter valid contract number
Goodbuy	GB	Enter valid contract number
National IPA	NIPA	(formerly known as TCPN)
OMNIA Partners	OMNIA	Enter valid contract number
PACE	PACE	Enter valid contract number
Purchasing Cooperative of America	PCA	Enter valid contract number
Region 19 Allied States Cooperative	ESC 19	Enter valid contract number
Region One Cooperative	ESC 1	Enter valid contract number
Sourcewell	SW	Enter valid contract number
STISD RFP	STISD RFP	Enter valid contract number
Texas SmartBuy	TXMAS	Enter valid contract number
TIPS-USA	TIPS	Enter valid contract number
US Communities	USC	Enter valid contract number
Quotes	Quotes	Attach District Quote Form (used when purchase is $1,000 or more from unapproved vendors)
Travel request	Travel	Travel advances, reimbursements, lodging, airfare, conference registration, etc.
Unapproved Vendor	MP	membership dues, food, items cannot be found from approved vendors, etc.
Manufacturer Part	OEM	
Contracted Services	CS	
Sole Source	SS	TEA Sole Source Approval Form (EDGAR) required

SOUTH TEXAS ISD
SUPPORTING DOCUMENTATION
REQUISITION CHECKLIST

Purchase of Goods/Services	
Quote(s)	District Quote Form (Not Awarded Vendor Over $1000.00 Local
Approved Vendor Purchasing Cooperative Contract	$10,000.00 Federal)
Travel- Registration	
Registration Form/ Documentation: name of conference/workshop, date, location, registration fee, etc.	
Prior Authorization Form	
Travel Advance- Employee Only	
Prior Authorization Form	Map: if requesting mileage (shortest distance)
Travel Advance Request Form	Board approval (out of state only)
Travel Documentation: name of conference/workshop, date, location, registration fee, etc.	
Hotel- Lodging	
Hotel Reservation	Prior Authorization Form
Board approval (out of state only)	
Travel Documentation: name of conference/workshop, date, location, registration fee, etc.	
Staff & Student Travel	
Prior Authorization Form (staff members attending)	Staff & Student Travel Request Form
Board approval (out of state only)	
List of students	
Superintendent Approval (In State)	
Travel Reimbursements	
Reimbursement Form	Original Receipts: shuttle, taxi, parking, flights, etc.
Prior Authorization Form/Certificate of Attendance	Map: if requesting mileage (shortest distance)
Mileage Reimbursement	
Mileage Form	
Map/Odometer readings on form	
Supporting documentation: (Ex: calendar, certificate of attendance, sign-in sheet, etc.)	

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SOUTH TEXAS ISD
PURCHASING TIMELINE GUIDE

Goods/Services	
Campus or Department orders goods or services by sending P/O to Vendor	No specific timeline for this step, except at the end of the year, all goods and services must be done or received by 08/31/XX
Vendor provides goods or services is rendered	Time starts ticking at this point to pay Vendor within 30 days of invoice, items received or services rendered
Goods or Services are verified by Campus or Department	Goods or services need to be verified within 5 days to meet due date
Campus or Department sends completed paying copies to the Business Office	Send Paying copies to Business Office within 10 days from receiving goods/services
Accounts Payable issues payment to Vendor before Due Date	Accounts Payable needs to take into consideration the time for processing and mailing of payment. Net 30 day term
Reimbursements - Non Travel	Require Approval from Asst. Superintendent of Finance & Operations
Travel	
Principal approves conference	Employee submits prior absence form as soon as possible
Registration, Travel Advance, Hotel	Employee submits all **required** forms via DocuSign, also submits all forms to Bookkeeper/Secretary as soon as possible
PO Paying copy submission	Complete documentation is to be received by the Business Office **two weeks before** the check is needed. Must take into account any holidays, and add the time to meet the requirements.
Travel Meals (PO Only)	Coaches/Sponsors must submit all require forms via DocuSign to Bookkeeper/Secretary at **least two weeks** before travel date. Requisition should be submit **at least a week** before travel date.
Athletic receipts for meals	Coach is to submit immediately to campus, and campus is to submit immediately to Business Office with paying copies.
Travel Reimbursements	Right after Trip within 10 days. Actual expenses are required in order to qualify for reimbusement.

There is a two-week deadline from the date the check needs to be processed, to submit paying copies to Accounts Payable. Any paying copies that do not meet the established deadlines will be treated on a reimbursement basis, after the traveler returns back from trip.

Note: Plan according; If the checks are needed during Holidays, planning ahead is required to process all documentation on a timely manner to meet two-week deadline.

Note: Any request not meeting deadlines, Principal or Supervisor must email Asst. Supt for Finance & Operations with justification.

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