

Purchasing

Process =

1. Request to Purchase → Product, Equipment, Services, Contracts,
2. Obtain Legal Quote/Bid/RFP →
 - a. Purchases over \$15,000 requires 3 Quotes from Approved Vendors
 - b. Purchases over \$100,000 requires 3 Quotes from Approved RFP Vendors or COOP Approved Vendors
 - c. Purchases over \$100,000 requires Consultation with Purchasing FIRST, prior to obtaining Quotes
 - d. 972-600-5440 - Discuss appropriate Purchasing Method and Procedure, Documents needed.

Purchasing

Process

1. Requisition → Munis: Enter Requisition(s) for selected Vendor(s), Attach Quote, with Method of Purchase
2. Purchase Order → Purchasing Converts Requisition to Purchase Order and Secretary receives and sends to Vendor.
3. Delivery → Vendor Delivers Order or Performs Services
4. Receiving → Requisitioner receives in Munis within 24 hours of Delivery
5. Invoicing → Vendor sends Invoice to Accounts Payable
6. Payment → Accounts Payable pays invoice based on match with Purchase Order

Purchasing

Rules =

1. Ordering without a Purchase Order is a violation of district policy (CH local).
2. Could result in termination, maybe criminal penalties.
3. District employees shall not use district funds, purchase orders, credit cards, store cards to purchase supplies, services, or equipment for personal or non-school use.

Purchasing Primary Functions

1. Through Approved Purchasing Methods, Establish Approved Vendors for the Purchase of Goods and Services;
2. Ensure every purchase is done in compliance with Federal, State, and District Policy.
3. Ensure each purchase has an appropriate Purchasing Method (Request for Quote, Request for Proposal, Cooperative Purchase)
4. Review and Approve Contracts, Route and Obtain Contract signatures.
5. Obtain approval from the Board on Certain Purchases

Purchasing Primary Functions

- Review contracts prior to submittal to Legal Services.
- Collaborate with Internal Departments on Purchasing Requirements: Legal, Risk Management, Accounts Payables.
- Maintain District-Side Annual Contract and Award List (12 Month Agreements).
- Maintain District's Purchasing Website
- Maintain List of Approved Suppliers, Vendors, and Contractors
- Process Requisitions to Purchase Orders

Purchasing Primary Functions

- Maintain documentation of All Purchases for Compliance and Audit Purposes
- Monitor Purchasing Categories for compliance with - \$100,000 Aggregation rule
- Conduct Purchasing Training for Campuses and Departments District-wide

Purchasing Management Tools

- Purchasing Website
- Purchasing Procedures Manual
- Purchasing Forms and Standardized Purchasing Documents
- Formal Procurement:
(RFP, RFQ, RFCSP, Coop Purchasing etc.)
- Annual Awarded Bids, Agreements, and Contracts
- Electronic Bidding
- Online Shopping

Purchasing “Method of Compliance” (MOC)

- MOC is an internal term used to describe a legal Method of Purchase. Required on ALL Quotes / Requisitions / Purchase Orders / and Contracts
- IISD Approved Methods of Compliance:
 - a. Request for Quote -----(Category Code less than \$100,000 districtwide)
 - b. Competitive Sealed Bid -----(for Purchases 100,000+ single or in aggregate)
 - c. Request for Proposal----- (for Purchases 100,000+ single or in aggregate)
 - d. Request for Competitive Cooperative Quote
(for Co-op Purchases \$100,000+ single or in aggregate)
 - e. Request for Qualifications-----(\$100,000+ single or in aggregate)
 - f. Sole Source
 - g. Construction Contracting per Govt. Code 2269.
- **Collaborate with Purchasing first** to determine the appropriate Purchasing Method, prior to obtaining quotes from vendors.

Purchasing Methods

- Purchasing Method per Dollar Threshold
 - a. Purchases under \$15,000 – Request for one (1) Quote
 - b. Purchases over \$15,000 but less than \$100,000
(Written Request for Quote from 3 Qualified Approved Vendors)
 - c. CONTACT PURCHASING BEFORE OBTAINING QUOTES FROM UNAPPROVED VENDOR.
 - d. Purchases over \$100,000 (Requires 3 or more formal quotes, bids, or proposals Method: Competitive Bid or Request for Proposal, Competitive Coop, Sole Source (if appropriate))

Purchasing Award Approval

Board approval required for:

- Purchases made by the Following Methods:
 - a. Contracts over \$100,000
 - b. Request for Proposals over \$100,000
 - c. Request for Qualifications over \$100,000
 - d. Sole Source over \$100,000
 - e. Coop Purchases over \$500,000
 - f. Interlocal Agreements

Formal Procurement Process (RFP)

- Department provides **Description, Scope / Specifications**
- Purchasing Establishes **Procurement Schedule**
- Purchasing Develops **Bid / RFP Document**
- Purchasing Post **Legal Notice / Advertisement** and **Issues Bid**
- **Pre-Proposal** Meeting (If applicable)
- Vendors submit **Questions**
- **Purchasing issues Addendum** to respond to Questions
- **Vendors submit Proposals** prior to Deadline
- Purchasing **Review and Tabulate Proposals**
- Department **Evaluate Proposals** and submit **Recommendation for Award** to **Selected Vendor**
- Purchasing prepare **Board Agenda** for Approval (if applicable)

CONTRACTS SIGNATURE AUTHORITY

Who signs Contracts

- a. **NEVER** sign a Contract or Agreement with a vendor or consultant
- b. All contracts MUST be first routed to Purchasing for review and signature.

Only the authorized administrators from Irving ISD may sign contracts

(Refer to Purchasing Website for [Contract Signature Approval Matrix](#))

- Dr. Dorian Galindo - Superintendent of Schools
 - Jorge Acosta - Deputy Superintendent of Human Resources, Finance, and Operations
 - Ahna Gomez – Deputy Superintendent of Leadership & Learning
 - Dr. Andrè Smith - Chief of Administrative Services
 - Devendra Shah - Chief of Technology & Innovation
 - Fernando Natividad – Chief Financial Officer
 - Liesl Payne – Chief of Staff
 - Luis Rosado - Director of Purchasing (Purchase Orders)
 - Board Approval required for certain contract awards exceeding \$100,000
- Any other signature may not be considered binding to the District. Entering into purchases and contracts verbally or without appropriate authorization is prohibited and a violation of district policy

Contracts Processing

Most Contracts require a Method of Compliance:

The rules of Competitive Procurement applies to Contracts the same as with other purchases, unless exempt by Tx Gov't Code 2254.

1. Contract Routing **begins at Purchasing:**
 - a. Contracts Submittal & Review Forms
 - b. The Vendor's Contract
 - c. Service Provider Agreement
 - d. Attachment A – Scope of Services (Contract Details)
2. Contracts should NOT be submitted to Legal Services or the Superintendent's Office directly for review or signature.
3. Overview of the Contract Submission / Routing / Signature process
 - a. Obtaining a Contract
 - b. Submitting a Contract
 - c. Reviewing a Contract
 - d. Routing a Contract
 - e. Signing of a Contract
3. REFER TO PURCHASING WEBSITE FOR FORMS:
CONTRACT SIGNATURE APPROVAL MATRIX