



Purchasing Guidelines

Sharyland Independent School District

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Purpose and Goals

The purpose of the District's purchasing program is to provide clear procedures and guidelines that help staff obtain the best value when buying goods and services. These procedures are based on best practices and are designed to ensure compliance with board policy, state laws, and federal regulations.

This manual serves as a guide for campus and department staff, promoting consistent purchasing practices across the District.

Our goal is to make the guidelines practical and easy to follow so that all staff can confidently apply sound purchasing practices in their daily operations in compliance with:

- Texas Education Code (TEC) §44.031 – §44.040
- Texas Administrative Code
- 2 CFR 200 (EDGAR) – Federal procurement standards for purchases made with federal funds
- Local Board Policies

Purchasing Overview

The Sharyland ISD Purchasing Department manages all procurement activities for the District under the authority granted by the Superintendent and the Board of Trustees. Our goal is to ensure that all materials, supplies, tools, and services are provided in the right quantity, at the right time and place, and at the best possible value without compromising quality, fairness, or integrity. All procurement activities are conducted in full compliance with applicable local, state, and federal laws and regulations, ensuring transparency, accountability, and ethical stewardship of public resources.

Purchasing Authority

- Board of Trustees – Approves contracts/purchases at or above-board approval threshold.
- Superintendent or Designee – Approves purchases within delegated authority.
- Purchasing Department – Issues purchase orders, ensures compliance, maintains vendor records.
- Campuses/Departments – Submit requisitions with required documentation and approvals.

Ethical Standards and Professional Conduct

Employees shall:

- Integrity: Be truthful, fair, and consistent in all procurement activities.
- Professionalism: Treat vendors, colleagues, and stakeholders with respect, upholding the District's reputation.
- No Improper Influence: Do not solicit or accept gifts, favors, or anything of value from vendors.
- Confidentiality: Protect vendor proposals, pricing, and other sensitive District information.

Compliance and Accountability

Employees shall:

- Compliance: Follow all federal, state, and local laws, as well as District policies and procedures.
- Equal Opportunity: Ensure all qualified vendors have an equal chance to compete for District business.
- Conflict of Interest: Avoid decisions influenced by personal or family interests and disclose potential conflicts in writing.
- Responsible Spending: Use District funds prudently, seeking the best value for taxpayers.
- Accountability: Maintain accurate records and be prepared to justify all purchasing decisions.

Violations of this code including providing false information, making fraudulent claims, or failing to cooperate in investigations may result in disciplinary action, up to and including termination of employment.

State and Federal Requirements

Favoring certain vendors or influencing purchases for personal gain is a serious violation of public trust. Texas Education Code §44.032, Local Government Code §271.029, and 2 C.F.R. §200.318(c)(1) prohibit employees, officers, or agents from taking part in contract decisions if they, their immediate family, or business partners have a financial or personal interest. They also may not ask for or accept gifts or favors from contractors, except for unsolicited items of nominal value. “Immediate family” includes a spouse, children, and parents, and a “partner” is anyone involved in a shared business venture with financial interest.

Sharyland ISD employees involved in purchasing must follow these ethical standards:

- Employees must not seek personal gain through their public duties.
- Employees must not try to influence others to act unethically.
- Employees must not participate in a procurement if they, an immediate family member, or a business connected to them has a financial interest or potential employment relationship related to the procurement.

Gratuities

Employees may not give, accept, or solicit gifts, favors, or job offers related to purchasing decisions or contracts. Gifts valued at \$50 or more are prohibited under Texas Penal Code §36.09 and may be a criminal offense. Vendor gifts are strongly discouraged, and any gift received must be reported on Form CIS with the Purchasing Department for filing.

Kickbacks

It is unethical for subcontractors to offer payments, gifts, or job opportunities to contractors or their associates in exchange for the award of a subcontract or order.

Conflict of Interest

Employees, officers, and officials may not accept benefits from anyone interested in District business (Texas Penal Code §36.08). Vendors and certain employees must file conflict of interest forms as required by Local Government Code Chapter 176. Forms and guidance are available from the Texas Ethics Commission.

Separate, Sequential, or Component Purchases

Employees must not avoid purchasing laws or District policies by splitting purchases.

- Sequential purchasing: Buying the same or similar items over 12 months in smaller amounts to avoid bidding requirements.
- Component purchasing: Splitting a single item into multiple purchase orders for its parts instead of one order for the whole item. Repeated add-on purchases may also appear as component purchasing.

Legal Requirements – Purchasing Contracts

All District contracts shall be competitively sourced for real property (goods) and/or services valued at \$50,000 or more in the aggregate during a 12-month period except contracts for the purchase of produce or vehicle fuel. TEC 44.031

Exceptions

1. Professional Services - Services that require specialized knowledge, skill, or expertise, such as architect, physician, certified public accountant, attorney, surveyor, engineer, or state certified real estate appraiser, and certified public accountant, architect, landscape architect, land surveyor, physician, including surgeon, professional engineer, state certified, or state licensed real estate appraiser, registered nurse, interior designer. (TGC 2254)
2. Sole Source Goods - items covered by a patent, copyright, or monopoly; films, books, manuscripts; utility services; and captive replacement or component parts for equipment repair. TEC 44.031j. Or the item is available only from a single source, and/or after solicitation of several sources, competition is determined inadequate. 2 CFR Part 200.320
3. Emergency Repairs or replacement of school equipment that has been damaged or destroyed with the approval of the Board of Trustees. TEC 44.031h. Or a public exigency or emergency for the requirement will

not permit a delay resulting from competitive solicitation. 2 CFR Part 200.320

4. Renewals of software licenses or support and maintenance shall be evidenced by either renewal terms in the original agreement, or by issuance of a bid tabulation or sole source justification. Both the bid tabulation and sole source justification documents shall remain valid for two additional years, at which time new documents must be submitted to justify any future renewals.
5. The Superintendent or designee may determine, on a case-by-case basis, all other qualified professional services as allowed by law.

Allowable Procurement Methods (TEC §44.031)

1. Competitive Bidding – Formal sealed bids awarded to the lowest responsible bidder meeting specifications.
2. Competitive Sealed Proposals (CSP) – Vendors submit proposals; evaluated on best value, not just lowest price.
3. Request for Proposals (RFP) – Often used for services; focuses on negotiation and evaluation criteria.
4. Request for Qualifications (RFQ) – Used to select professional services (architects, engineers, surveyors). Price is not the initial factor.
5. Interlocal Contracts – Purchases through cooperative agreements with other governmental entities or cooperatives (e.g., Sourcewell, BuyBoard, TIPS).
6. Design-Build Contracts – For construction projects; combines design and construction under one contract.
7. Construction Manager-at-Risk (CMAR) – Hires a construction manager to oversee a project, holding subcontractor contracts.
8. Job Order Contracting (JOC) – For repair, maintenance, and minor construction with pre-established unit prices.
9. Reverse Auction – An online bidding process where vendors compete by lowering prices in real time.

Procurement Process

1. Determine the Purchase Threshold
 - If the aggregate value of goods/services exceeds \$100,000 in a 12-month period, the District must use one of the approved procurement methods under Texas law.
2. Select an Approved Procurement Method

Districts must choose the method that provides the best value:

 - Competitive bidding (for non-construction services)
 - Competitive sealed proposals
 - Request for proposals (RFP)
 - Interlocal contracts (with other government entities)
 - Reverse auction
 - Construction-specific methods under Chapter 2269 of the Government Code.
3. Develop and Issue Solicitation Documents
 - Prepare bid or proposal documents with clear specifications, evaluation criteria, and submission instructions.
 - Publicly advertise the solicitation to ensure transparency and competition.
4. Receive and Evaluate Responses
 - Responses must be received by the deadline.
 - Evaluation must follow the criteria stated in the solicitation (e.g., price, experience, quality).
 - For RFPs, scoring rubric is often used.
5. Board Approval
 - The school board must approve contracts exceeding the threshold.

- Documentation of the procurement process and evaluation must be presented.
- 6. Award the Contract
 - Award to the vendor offering the best value, not necessarily the lowest price.
 - Notify all bidders of the outcome.
- 7. Maintain Records
 - Keep procurement records for audit and compliance purposes.
Procurement and contract records must be retained for at least five years or longer if required by the grant or audit conditions.
 - Include bid documents, evaluations, board minutes, and contract terms.
- 8. Monitor Contract Performance
 - Ensure vendors meet contract terms.
 - Address any issues or non-compliance promptly.

Awarded Vendor List

An Awarded Vendor is a company or service provider that has been selected through a formal competitive procurement process and approved by the school District or an authorized purchasing cooperative. This means the vendor has met specific standards for quality, pricing, and reliability and is under a binding contract that ensures compliance and best value for the District.

How Vendors Are Awarded

- The District issues solicitations such as Invitations for Bid (IFB), Requests for Proposals (RFP), or Requests for Qualifications (RFQ).
- Vendors submit offers, which may be evaluated by line-item pricing or by an overall catalog discount.
 - Line-Item Awards – Vendors are awarded based on the lowest price or best value for specific listed products.
 - Catalog/Discount Awards – Vendors are awarded based on a percentage discount from a published catalog or price list, which applies to a wide range of products.
- Contracts are awarded to the vendor(s) that best meets the District's needs and provides the most advantageous value.
- Some awarded vendors are available through cooperative purchasing agreements approved by the District, which allow purchasing under contracts already negotiated by other public entities.

Awarded Vendors

Using awarded vendors provides several key benefits to the District:

- Legal Compliance – Ensures purchases follow the Texas Education Code and state procurement rules.
- Accountability – Promotes fair competition and transparency.
- Efficiency – Speeds up purchasing with pre-approved contracts, saving time and resources.
- Audit-Ready – Maintains clear records and documentation for audits.
Procurement and contract records must be retained for at least five years or longer if required by the grant or audit conditions.

Accessing Awarded Vendor List

The current Awarded Vendor List is available on the Purchasing Department website and is organized by category (e.g., instructional supplies, custodial, technology). Staff must check the AVL before making purchases to ensure compliance with District policy.

Commodity Categories

The Purchasing Department has developed a grouping of commodity categories based on those listed in Texas Education Agency's Financial Accountability System Resource Guide (FASRG). By using commodity categories, Purchasing can ensure that the District receives the best value for its budget expenditures and that all purchases comply with the competitive procurement statutes, policies, and procedures. A complete listing of all commodity groupings and current Sharyland ISD awarded contracts are posted on the Purchasing website.

These commodities include, but are not limited to:

- Athletic Supplies
- Awards and Incentives
- Charter Bus Services
- General Merchandise
- Career and Technical Education
- Maintenance (Electrical, Plumbing, General Hardware, Lumber, HVAC, Paint, Welding, Landscape, Bus Parts, Vehicle Parts, Flooring and Carpet Supplies and Services)

Vendor Registration

Sharyland ISD regularly issues bids and proposals for goods and services. Vendors are encouraged to monitor the Vendor Registration page for upcoming solicitations.

Vendors who wish to receive notices of future opportunities should complete the ION Vendor Online Registration found on the Purchasing Department website. This is the most reliable way to access all upcoming bids and specifications.

Purchasing Cooperatives

The District partners with several purchasing entities to provide access to pre-approved vendors. Vendors and staff are encouraged to use these cooperatives to simplify procurement and expand options.

Approved Cooperatives:

- 1-GPA
- Allied States Cooperative (ASC)
- Department of Information Resources (DIR)
- ESC 1
- ESC 2 (Good buy)
- ESC 20 (PACE)
- Harris County Department of Education (HCDE) Choice Partners
- Houston-Galveston Area Council (H-GAC)
- Keystone Purchasing Network
- Omnia Partners
- Sourcewell
- TASB BuyBoard Purchasing Cooperative
- Texas Smart Buy
- The Interlocal Purchasing System (TIPS)

Adding a New Vendor in Skyward

If a vendor is not in the finance system or a new vendor number is needed, follow these steps:

1. Obtain Required Forms – Collect a W-9 and a CIQ (Conflict of Interest Questionnaire) from the vendor.
2. Complete Vendor Master Form – The requesting user must fill out the Vendor Master Form, available on the Purchasing Department website.
3. Attach Documents – Attach the W-9 and CIQ to the Vendor Master Form.
4. Submit Request – Submit the completed form to the Purchasing Department.
5. Confirmation – You will receive an email once the vendor number has been created in Skyward.

Requisitions and Purchase Orders

To ensure proper financial controls and compliance with District policy, all purchases must follow the established requisition and purchase order process.

- All purchases must begin with a requisition in the district's financial system (Skyward).
- The Purchasing Department reviews requisitions and issues the official purchase order (PO).
- An approved PO is required before obtaining any goods or services, as it establishes the district's official obligation to the vendor.
- Verbal or after-the-fact (policy violation subject to administrative review) purchases will only be honored after review, and the employee must complete a Non-Compliance Form to document corrective action.

Purchase Thresholds

Purchase dollar thresholds define the specific spending limits and approval requirements that the districts must follow. These thresholds ensure compliance with state law, promote transparency, and safeguard the responsible use of public funds.

For purchases of personal property or services totaling less than \$100,000 in the aggregate for the fiscal year, schools and departments will be allowed to purchase using the Best Value criteria for the individual transaction, with the following guidelines:

Purchases - (Up to \$3,499)

For purchases up to \$3,499, staff should use SISD-awarded or cooperative vendors for faster processing. One written quote must be attached to the requisition. Purchases from the same vendor over 12 months are combined to check compliance with thresholds. New vendors may be added if needed. For cooperative contracts, the vendor must list the cooperative name and contract number on the quote.

Purchases from \$3,500-\$49,999

For purchases over \$3,500, staff must use SISD-awarded or cooperative vendors. Purchases may be denied if total District spending in that category exceeds \$100,000 in a fiscal year (tracked by Purchasing).

Schools and departments must get three written quotes for each requisition, with limited exceptions. The quotes and recap form must be attached as backup. For cooperative contracts, the vendor must list the cooperative name and contract number on the quote.

Exceptions:

- Travel related expenses
- Purchases made with Fund 865 Funds (Student Clubs)
- Interlocal Agreements – These are partnerships with cities, government agencies, or organizations. Staff must consult the Purchasing Department before starting, as some agreements need Board approval.
- Newspaper Subscriptions and legal notices
- Membership Fees to professional associations

- Professional Instruction Services; Over \$100,000 requires Board approval.
- Postage purchased from the Post Office
- Fuel
- Produce
- Food – meals for meetings and events.

Purchases \$100,000 or more

For purchases over \$50,000, staff must contact the Purchasing Department to confirm whether a formal procurement process is required and has been followed. Purchasing will guide departments through requirements, prepare Board recommendations, manage vendor lists, and help address any issues.

Purchases over \$250,000 (Involving Federal Funds)

For purchases exceeding \$250,000 that involve federal funds, staff must complete an independent cost estimate and a cost/price analysis. After these steps, the procurement must follow the procedures outlined for purchases over \$50,000, including coordination with the Purchasing Department to ensure compliance with statutory requirements, competitive procurement rules, and Board approval processes.

All vendors paid with federal funds must be verified in SAM.gov (System for Award Management) to confirm they are not suspended or debarred.

Self-Certification of Micro-Purchase Threshold

The District does not utilize the option to self-certify an increased micro-purchase threshold for federal funds. All purchases using federal funds will adhere to the standard micro-purchase threshold as established by federal regulations and District policy.

Payment Requisition (PA)

Payment Authorization is used when the district needs to pay for goods or services without a prior purchase order. This typically applies to:

- Recurring bills like utilities or phone services
- Any other situation where an invoice is received and no purchase order exists

Important: This should not be used for the purchase of merchandise or services. Such use is considered after-the-fact (policy violation subject to administrative review), and a non-compliance memo will be issued.

Technology Purchases

All technology-related purchases must be approved by the Technology Department before submission to the Purchasing Department.

Hardware and Peripherals

- Campuses should first review awarded line items from the District RFP.
- For items not listed on the RFP, campuses must submit a request via Eduphoria to the Technology Department to obtain a quote.

Software Purchases and Renewals

All software purchases and renewals must be reviewed by both the Technology Department and the Curriculum Department to ensure:

- Compliance with District technology standards
- Alignment with District-approved curriculum
- All software purchases or renewals require a request form submitted through Laserfiche.
- After Technology Department approval, the purchase request may be submitted to the Purchasing Department for processing.

Open Market /Miscellaneous Purchases

These are purchases from vendors without a District contract or when the purchase amount is too low to meet formal procurement requirements.

- The requester must show the purchase is fair value.
- A Justification Form must be completed.
- Three quotes may be required, depending on the purchase amount.

All purchases must follow District policies and be properly documented for audit purposes.

E-Commerce Marketplace Orders

All ecommerce marketplace purchases must be completed exclusively through the Skyward finance system and must be made from authorized vendors that have:

1. Met all applicable procurement guidelines, and
2. An active contract with the district.

These purchases are exempt from the three-quote requirement for transactions exceeding \$3,500. Vendors participating in the marketplace have preadjusted pricing to reflect applicable discounts, ensuring the district receives best-value pricing.

Open Blanket Purchase Order

An Open “Blanket” Purchase Order is a purchase order issued for recurring goods or services over a set period, rather than for a single purchase. It allows the district to pay for repeated needs without creating a new purchase order each time.

When it is used:

The district allows Open Purchase Orders only for the Operations programs:

- Maintenance
- Custodial
- Child Nutrition Program
- Transportation

For all other programs, employees must contact the Purchasing Department to discuss and plan the appropriate purchasing method.

All blanket purchase orders must include the following or they will be returned for corrections:

- Description of items being purchased
- Purpose of the items (e.g., Plumbing supplies, Dairy products)
- Time frame for purchases (not to exceed one month)
- One open PO at the start of the fiscal year for recurring expenses (e.g., copiers, maintenance agreements)
- For instructional purchases, use should be limited. Submit a list or shopping cart of the items intended to be purchased.

Note: Blanket POs are authorized for one month only unless prior approval is granted by the Purchasing Department.

How to Process a Purchase Requisition

1. Identify Need – Determine what goods or services are needed, including description, quantity, cost, and purpose.
2. Check Budget – Make sure funds are available in the correct account.
3. Enter Requisition in Skyward – Include item details, purpose, account code, and attach supporting documents (quotes, agreements, board approvals if needed).

4. Purchasing Review – The Purchasing Department checks the requisition for compliance and completeness.
5. Generate Purchase Order (PO) – Once approved, a PO is issued to the vendor.

Note: A purchase requisition is an internal request only. The order becomes official only after a PO is issued.

Receiving and Payment

1. All shipments must be inspected for quantity and quality.
2. Packing slips and invoices must be forwarded to Accounts Payable promptly.
3. Payment will be made only after goods/services are received and verified and released for payment in the Skyward finance system.

Cancellation of a Purchase Order

If a Purchase Order (PO) needs to be canceled, the school or department must notify the Purchasing Department, which will close the PO and release the funds. The school or department must also inform the vendor.

Invoice Dates

Invoices must not be dated earlier than the PO date.

- All invoices should match or follow the Purchasing Department's final approval date.
- If an invoice arrives before a PO is processed, a payment authorization may be used only with approval from the Chief Financial Officer or Purchasing Director, and a non-compliance form must be attached.

Pre-Paid Purchases

Pre-payment for equipment or services is not allowed. Vendors are paid only after goods are received or services performed. Exceptions require approval from the CFO or Purchasing Director.

Tax Exempt Status

The District is tax-exempt under Texas law. Items purchased under this status must be used for District business only; misuse is a criminal offense.

Surplus Property

The Superintendent or designee is authorized to declare District materials, equipment, and supplies to be unnecessary and shall dispose of unnecessary materials, equipment, and supplies for fair market value. If unnecessary property has no value, the Superintendent or designee may dispose of such property according to administrative discretion. Items purchased with federal funds must follow federal rules. All vendors paid with federal funds must be verified in SAM.gov (System for Award Management) to confirm they are not suspended or debarred.

ACH Setup in Vendor File

Initiating ACH Setup

- Vendor ACH authorization is completed only through the district's Laserfiche ACH Authorization Form.
- A secure link is emailed directly to the vendor contact on record in the district's vendor system.
- Vendor completes the form and submits electronically through Laserfiche.

Verification of Vendor Information

- Purchasing/Finance staff verify:
 - W-9 form is on file and matches vendor legal name and TIN.
 - Form is signed and complete.

Data Entry into Vendor File (Skyward)

- Purchasing/Finance staff update the vendor file in Skyward using the approved information.
- Supportive documentation (Laserfiche submission and attachments) is uploaded into the vendor record in Skyward.

Review and Approval

- Completed form and supporting documents are routed to the Purchasing Director for review.
- Purchasing Director approves setup after confirming verification steps are documented.

Pre-Note Verification

- Accounts Payable initiates a pre-note transaction (zero-dollar ACH test) to validate the banking information.
- Once the pre-note clears successfully, the vendor is activated for ACH payments.

Updates or Changes to ACH

- If a vendor requests changes to banking information:
 - The district sends a new Laserfiche ACH Authorization link to the vendor contact on file.
 - Vendor completes and submits electronically.
- If the vendor contact information changes, the vendor must provide written authorization on company letterhead identifying the new contact.
- The same review, approval, and pre-note process applies to updates.

Recordkeeping

- All ACH authorization forms and supporting documents are stored in Laserfiche and uploaded to the vendor file in Skyward.
- Records are retained per the Texas Records Retention Schedule.

Security and Compliance

- Links are sent only to the vendor contact of record in the district's vendor system.
- No banking information is accepted by phone, email, or outside the Laserfiche submission process.
- Access to vendor banking information in Skyward is restricted to authorized business office staff.

Purchasing Thresholds and Requirements Reference Table

The tables below outline purchasing thresholds and required procedures for both federal and non-federal funds for quick reference.

Purchases with Local Funds				
Purchase Commitment	Support Recommended	Additional Forms	RFP/BID	Board Approval
Non-Approved Vendors under \$100,000	Up to \$3,499 One Quote, over \$3,500 Three Quotes	Justification form and Recap Form \$3,500 and over	None, unless it is over \$50,000	N/A
Approved Vendors up to \$49,999.99	Up to \$3,499 One Quote, over \$3,500 Three Quotes	Recap Form \$3,500 and over	District Bid or COOP	N/A
Purchases over \$100,000	Three Quotes	Re-cap Form	District Bid or COOP	Required
Sole Source Purchases	One Quote	Justification Form and Supportive Documentation	If Applicable	Required
NOTE: Preferred items are not considered sole source, you will need three quotes from vendors that provide similar products or services. COOP contracts number needs to be referenced on price quote.				

Purchases with Federal/Grant Funds				
Purchase Commitment	Support Recommended	Additional Forms	RFP/BID	Board Approval
Non-Approved Vendors Micro Purchases for less than \$10,000	Up to \$3,499 One Quote, over \$3,500 two Quotes	Sam Report, Re-cap form and Justification Form	N/A	N/A
Approved Vendors Micro Purchases for less than \$10,000	Up to \$3,499 One Quote, over \$3,500 two Quotes	Sam Report and Re-cap Form	District Bid or COOP	N/A
Non-Approved Vendors Micro Purchases from \$10,000 - \$49,999.99	Two Quotes	Sam Report, Justification Form and Re-Cap Form	N/A	N/A
Approved Vendors Micro Purchases from \$10,000 - \$49,999.99	Two Quotes	Sam Report and Re-Cap Form	District Bid or COOP	N/A
Purchases over \$100,000	Three Quotes	Sam Report, Re-Cap Form	District Bid or COOP	Required
Purchases over \$250,000	Price and Cost Analysis required	Sam Report, Bid or COOP Tabulations Re-Cap Form	Required	Required
Sole Source Purchase under \$50,000	Up to \$3,499 One Quote	Justification Form, Sam Report, Supportive Documentation	N/A	N/A
Sole Source Purchase over \$50,000	One Quote	Justification Form, Sam Report and TEA approval Form	N/A	Boad Approval
NOTE: Preferred items are not considered sole source, you will need quotes from vendors that provide similar products or services. COOP contracts number needs to be referenced on price quote.				

Staff and Student Incentive Awards

All incentives must comply with local, state, and federal regulations, including IRS guidelines, and promote fairness and equity. Incentives are items of nominal value provided as recognition or motivation, not as compensation or cash equivalents.

Purchases for goods or services funded by Student Activity Funds (Budget Fund Code 865) are not considered District funds, so they are exempt from all public procurement requirements and both federal and state procurement rules and regulations. However, purchases for goods or services with funds derived from student activities (i.e., fundraisers) that are deposited into a District-controlled activity account (e.g., Budget Code 461) or General Operating Fund account (e.g., Fund Account 199) must comply with all applicable procurement requirements.

Incentive for purposes of these guidelines refer to a “reward” for performing an activity, achieving a milestone, or some other form of recognition.

Funding Sources:

- Campus Activity Fund (Fund 461): May be used for allowable staff and student incentives
- Non-District Student Activity Fund (Fund 865): May be used for reasonable student incentives. Purchases must be approved by the student group treasurer, sponsor, and campus principal

Equity and Compliance:

- All students must have an equal opportunity to earn incentives
- Student incentives must comply with UIL rules and state guidelines
- Federal/state FMNV (Foods of Minimal Nutritional Value) guidelines
- All students and staff must have an opportunity to receive incentives

Meals and Refreshments:

- Staff appreciation meals must be officially recognized as a District’s event.
- Meals provided during meetings or professional development events are not considered incentives
- Daily staff refreshments, such as coffee, are not considered incentives and should not be treated as incentives

Staff and Student Incentive and Award Reference Table

Incentive Type	Description	District Funds	State/Federal Funds	Non-District Funds
Small Value Items (≤ \$10 each)	Trophies, ribbons, certificates, plaques	Allowed	Not Allowed	Allowed
Gift Cards	Pre-set value cards for recipient’s discretion	Not Allowed	Not Allowed	Not Allowed
Gifts or Personal Items	Birthday/holiday gifts, flowers, candy, or gift cards for personal services	Not Allowed	Not Allowed	Staff: Allowed Students: Not Allowed
Snack Food	Cookies, pretzels, chips, ice cream, water, sports drinks, or other snacks (follow FMNV)	Allowed	Not Allowed	Allowed
Meal Food	Pizza, hamburgers, hot dogs, tacos, or other foods considered a meal (e.g., Student of the Week, senior events)	Allowed Staff ≤ \$12 Students ≤ \$8	Not Allowed	Allowed Staff ≤ \$12 Students ≤ \$8
School Spirit Items (≤ \$30 each)	T-shirts, caps, water bottles, towels, clocks, mugs	Allowed	Not Allowed	Allowed
Service or Longevity Awards	Service pins, certificates, ribbons, non-cash awards (≤ \$30 each)	Allowed	Not Allowed	Allowed
Retirement Awards	Plaques, service pins, or other non-cash awards (≤ \$50 each)	Allowed HR Only	Not Allowed	Allowed
Electronics	Laptops, tablets, phones, printers, digital cameras, gaming consoles, calculators	Not Allowed	Not Allowed	Allowed

Note: Meals for staff are allowed only during all day, closed meetings or working lunches. A meeting agenda must be provided to support the expense.

Meals may be provided to students during school-sponsored events (academic or athletic) while the students are away from the school campus.

Employee achievement awards, such as length-of-service or safety shall be presented to an employee as part of a meaningful presentation, i.e. End-of-the-Year Employee Recognition & Retiree Event.

Staff Meals during Meetings/Training Session

1. Light meals may be provided during all day (six hours or more) meetings or training sessions when it is not practical for participants to get lunch on their own (for example, due to a remote location) and their attendance is essential to achieving the session's objectives.
2. A "working" or "light" meal is considered reasonable if it costs \$12 or less per person.

For a working meal, when staff or participants are engaged in activities during mealtimes, an agenda and a participation list documenting the meeting are needed.

Professional and Consulting Services

Under Texas Education Code 44.031 (f) this section does not apply to a contract for professional services rendered, including services of an architect, attorney, certified public accountant, engineer, or fiscal agent. A school District may, at its option, contract for professional services rendered by a financial consultant or a technology consultant in the manner provided by Section 2254.003, Government Code, in lieu of the methods provided by this section. NOTE: federally funded professional service contracts must be let on a competitive basis. Competitive bids shall not be solicited for professional services of any licensed or registered:

- certified public accountant,
- architect,
- landscape architect,
- land surveyor,
- physician,
- optometrist,
- professional engineer,
- state-certified or state-licensed real estate appraiser, or
- registered nurse.

Contracts for these professional services shall be made on the basis of demonstrated competence and qualifications to perform the services and for a fair and reasonable price. Government Code 2254.002, 2254.003(a). In connection with certain professional service contracts, specifically architectural or engineering, Chapter 2254, Government Code, requires a two-step negotiation process. The two-step process only allows negotiation of price after an initial selection based upon demonstrated competence and qualifications of the person/firm.

Consultant Services (Independent Contractors / Non-Employee Services)

A consultant is an independent contractor (not an employee) who provides specialized, temporary or short-term services outside the routine expertise of District staff.

Approval Required:

- Complete a Consultant Form and obtain administrator approval before any services begin.
- Contract Review: If consultant submits their own contract the contract must be reviewed by Purchasing prior to signature.
- Background Checks: Required for consultants on campus or with student access.

- Dollar Thresholds: Contracts over statutory thresholds (e.g., \$100,000 in 12 months) may require competitive procurement under TEC §44.031, unless Chapter 2254 applies.
- Ethics: No staff participation with personal or financial interest; comply with District ethics policies.
- Oversight: Monitor performance, verify deliverables, match invoices, and retain records for audit. Procurement and contract records must be retained for at least five years or longer if required by the grant or audit conditions.
- Subcontractors: Require District approval and adherence to same standards.

Contract Review and Signature Guidelines

All contracts must be reviewed before signatures, and a fully executed copy must be kept on file with the Purchasing Department.

1. Authority and Responsibilities

- The Superintendent or designee has final signature authority.
- The Purchasing Director reviews contracts for compliance with statutes and procurement requirements.
- The Department or Program Manager is responsible for:
 - Understanding the scope of work and contract requirements.
 - Ensuring deliverables, timelines, and budget align with District goals.

2. Contract Review Process

All contracts must be reviewed before being signed. Each department must verify:

- Scope of work and services are clearly defined.
- Funding sources are identified, and budget is available.
- Required documents are attached (W-9, CIQ, Form 1295, Insurance Certificates).
- Contract terms, payment schedule, and dates are correct.
- Legal review is obtained when needed.
- Purchasing reviews compliance and routing before signature.

3. Signatures and Execution

- Contracts must be signed by authorized representatives from both parties.
- Electronic signatures are acceptable.
- The effective date should match or follow the final signature date.
- No work or payment should begin until the contract is fully executed.
- A fully signed copy must be sent to the Purchasing Department for recordkeeping.
- All amendments, renewals, or changes must follow the same review and signature process as the original contract.

Travel Guidelines

Staff Travel

Applies to staff traveling for conferences, training, meetings, or other work-related purposes without students.

Authorization

- Complete a Travel Request through Laserfiche.
- All travel must be pre-approved by the appropriate supervisor.

Transportation

- District vehicles – Staff should use District-owned vehicles as the first option for official travel.
- Rental vehicles – If District vehicles are unavailable, rentals may be used through approved vendors under state contract.
- Personal vehicles – Use of personal vehicles is permitted only as a last resort. Reimbursement will be limited to the cost equivalent of a rental vehicle under the state contract rate.

Mileage reimbursement

- Mileage reimbursement is based on current IRS guidelines and District approved rates.
- If an employee elects to use a personal vehicle for personal convenience rather than utilizing an available District or rental vehicle, reimbursement will be limited to the equivalent cost of renting a vehicle through the state contract.

Lodging

- Lodging should be booked at reasonable rates, aligned with the GSA per diem rate for the travel location.
- Booking at the designated conference hotel is permitted, even if it exceeds the GSA rate.
- Standard rooming assignment is two persons per room, same sex.
- If an employee requests a private room for personal preference, prior approval is required. The traveler is responsible for the entire room rate.

Meals

Meal reimbursement is based on travel timing and follows District rates:

- Breakfast – \$7 (eligible if travel begins before 6:00 AM)
- Lunch – \$13 (eligible during travel hours)
- Dinner – \$20 (eligible if travel ends after 7:00 PM)
- If a meal is provided by the host (e.g., conference or training), the traveler must disclose and not seek reimbursement for that meal.
- Alcohol is not reimbursable.
- Reimbursement requisition must be submitted within 10 business days of return.

Staff Traveling with Students

Apply to field trips, competitions, or other student activities.

Authorization and Planning

- Complete a Travel Request through Laserfiche.
- Travel must be approved by campus administration and include a detailed itinerary.
- Emergency contacts, medical information, and student rosters must be documented.

Transportation

- Students are required to travel using school provided transportation, such as District-owned buses or vehicles, for all school-sponsored events and activities.
- Use of charter buses is permitted when District transportation is unavailable or when approved by administration for logistical or safety reasons. Charter services must be arranged through approved vendors in accordance with District procurement procedures.

Supervision and Safety

- Maintain appropriate student-to-staff ratios.
- Follow District policies for student safety, behavior, and emergency procedures.

Lodging

- Accommodation must be safe and appropriate for student travel.
- Rooms should be assigned to separate male/female staff and students.
- Four students per room.

Meals

- Meal reimbursement is \$8.00 per person for district travel and \$9.00 per person for regional or state travel (students and staff).
- Alcohol is not an allowable expense.

Documentation and Reimbursement

- Submit travel reimbursement requests promptly with itemized receipts.

Guidelines for Federal Funds (EDGAR Compliance)

All purchases made with federal funds must comply with EDGAR (2 C.F.R. §200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards). These guidelines ensure responsible, legal, and transparent use of federal funds.

All vendors paid with federal funds must be verified in SAM.gov (System for Award Management) to confirm they are not suspended or debarred.

Competition and Vendor Selection

- Federal funds require full and open competition whenever possible.
- Solicit multiple quotes or bids depending on the amount and risk.
- Document the basis for vendor selection, including price, quality, and service.

Cost Principles

- Ensure all purchases are necessary, reasonable, and allocable to the federal program.
- Avoid unnecessary or luxury items not directly tied to program objectives.
- Maintain clear records of how costs were determined.

Conflict of Interest

- Employees must avoid conflicts of interest in federal fund procurement.
- Disclose any potential conflicts in writing.
- Family or personal relationships with vendors must not influence purchasing decisions.

Documentation and Recordkeeping

- Keep complete records of all procurement activities, including quotes, bids, contracts, and approvals.
- Maintain documentation for audit purposes, typically 3–5 years after the grant ends.
- Records must show compliance with both federal and District requirements.

Cost/Price Analysis

- For all purchases, particularly non-competitive ones, conduct a cost or price analysis to ensure reasonable pricing.
- Document the methodology used to determine price reasonableness.

Compliance with Federal Regulations

- Follow all applicable federal laws, including EDGAR §§200.317–200.326.
- Adhere to special conditions of federal grants (e.g., equipment, travel, or services).
- Purchasing staff are responsible for reviewing compliance; program managers ensure the purchase is appropriate for the grant's purpose.

Monitoring and Oversight

- The district will periodically review procurement activities funded by federal grants.
- Staff must cooperate with internal and external audits.
- Any irregularities or suspected violations must be reported immediately.

References:

- 2 C.F.R. §200.317–327 – Procurement Standards for Federal Awards (EDGAR)
- Texas Education Agency (TEA) Purchasing Guidelines for Federal Funds