



Purchasing Procedures Manual

2026-2027

Purchasing Guide by Dollar Amount	
When making any purchase you should always attempt to use an Approved Vendor First	
< \$50,000	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
\$50,000 - \$99,999	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.
> \$100,000	Requires a formal bid process and requires approval from the Board.

Finding a Vendor

Step 1: Look at appropriate Bid Tabulation.

- Listed on PflSD Website (not Intranet) under Departments -> Procurement and Auxiliary Services -> Information for Vendors-> Current Bid Results.
- 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 PflSD website under Departments -> Procurement and Auxiliary Services -> Information for Employees -> 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.

Step 3: If vendor is not in Skyward, please send us an Add the vendor form, CIQ form and 2024 W-9.

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, Instrument purchases (fixed assets of 10K or more), purchases with less than 20-line items. Unless there is a “Not to exceed” ex. Unknown specifics: Home Depot, Costco, HEB. Add quotes to these requisitions.**
- **Ecommerce Request** (this type of PO contains one or more-line items for specific dollar amounts and quantities) **The PO is created and links to the following vendors: Amazon, Lakeshore Learning and School Specialty.**
- **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.

Cooperative Contracted Vendors

The decision to use a cooperative contract is to be made by the Purchasing Department not the department or campus.

It is the Purchasing Department’s role to ensure if the best interest of the District is being met by whichever process is available to secure such products or services. The department/ campus must always consider all procurements as competitive opportunities and no one vendor should be considered without such due process.

The District partners with the following purchasing entities (cooperatives):

- 1GPA
- CTPA (Central Texas Purchasing Alliance)
- Choice Partners
- E&I Cooperative
- HGACBUY
- Omnia Partners – including US Communities, TCPN
- Region 19 (Allied States Cooperative)
- TASB Buyboard
- TIPS (The Interlocal Purchasing System)
- T-PASS

Pflugerville ISD is also eligible to procure goods and services through State of Texas contracting programs such as:

- **Texas Multiple Award Schedules (TXMAS, Smart Buy)**
- **Department of Information Resources (DIR)**

Purchasing Pitfalls

Some of the most common pitfalls that are experienced involve the following:

- **Rush or Non-Standard Purchase Orders – Allowing enough time to process requisitions is paramount to having success. It must be noted that acquiring goods or services without a properly issued purchase order is a violation of board policy (CH LOCAL).**

Emergency Purchases

Under the Texas Education Code 44.031 text of subsection (h) as amended by Acts 1999, 76th Leg., chapter 1225, "If school equipment 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 of trustees determines that the delay posed by the methods provided for in this section would prevent or substantially impair the conduct of classes or other essential school activities, then contracts for the replacement or repair of the equipment or the part of the school facility may be made by methods other than those required by this section."

The Board of Trustees has delegated to the Board President and/or Superintendent the authority to take necessary action in the event of a catastrophe, emergency, or natural disaster affecting the District and the authority to contract for the replacement or repair of school facilities and/or equipment under Education Code Chapter 44, Subchapter B. [see CH (LOCAL)].

Sole Source Procurements

The Pflugerville ISD Purchasing Department maintains a sole source list.

For an item to be considered for purchase under a sole source justification, **the Purchasing Department must first review the request based on the requirements set forth in the Texas Education Code 44.031(j) and (k) and District policy CH(LEGAL). The vendor's product claim must then be reviewed, researched and approved by the District's Purchasing Department to be added to the Sole Source Vendor List. The product must be on the list to be considered acceptable for purchase without a formal bid process.**

To be a bona fide sole source exemption to purchasing law requirements, there must be no other like items available for purchase that would serve the same purpose or function, and only one price for the product because of exclusive distribution or marketing rights.

The fact that an item is covered by a patent or copyright is but only one factor in determining if the purchase falls under the sole source exemption to the purchase requirements. **The District's Purchasing Department shall be the sole determinate on the acceptability of an item for inclusion on the sole source list.**

The sole source exceptions provided by the TEC 44.031(j) do not apply to mainframe data-processing equipment and peripheral attachments with a single-item purchase price in excess of \$15,000.

Acceptable Items

To be considered, the item must be available from only one source (not provided through distributors or dealers) and meet one of the following descriptions:

- an item for which competition is precluded due to the existence of a patent, copyright, secret process, or monopoly;

- a film, manuscript, or book;
- a captive replacement part or component for equipment.

The following will not be considered acceptable for inclusion in the sole source list by the District:

- Services are not included in the statute and must be procured through other appropriate means
- A product with a patent that does not change the intent or output of an item, allowing for competition
- from another manufacturer's product that meets the same intent or output
- A product that is marketed through two or more distributors or has two or more outlets for purchasing the product
- Regional contracts between a manufacturer and a vendor that limits other vendors from selling the same product to the District.

HOW TO MAKE A DISTRICT PURCHASE

The following guidelines are established based on State of Texas and Federal statutes, and District policies CH (Legal) and CH (Local), and these requirements are to assist District personnel in making a purchase using District managed funds. Please note, if federal funds (not related to Food and Nutrition) are to be utilized, the end user must follow the State and Federal Grants Manual guidelines.

Awards of purchase contracts shall be subject to the following legal requirements:

Board Policy

- BBFB (LEGAL) Ethics – Prohibited Practices
- CH (LEGAL) Purchasing and Acquisition
- CH (LOCAL) Purchasing and Acquisition
- CHH (LEGAL) Purchasing and Acquisition – Financing Personal Property Purchases
- CHG (LEGAL) Purchasing and Acquisition – Real Property and Improvements
- CK (LOCAL) Safety Program / Risk Management
- CR (LEGAL) Insurance and Annuities Management
- CV (LEGAL) Facilities Construction
- CV (LOCAL) Facilities Construction
- DBD (LEGAL) Employment Requirements and Restrictions – Conflict of Interest
- DBD (LOCAL) Employment Requirements and Restrictions – Conflict of Interest

Federal Regulations

- Office of Management and Budget (OMB) Circular A-21 Cost Principals for Educational Institutions
- Office of Management and Budget (OMB) Circular A-87 State and Local Governments

State Statutes

- [Texas Education Code Chapter 44](#) – Fiscal Management – Subchapter B
- [Texas Education Code Chapter 45](#) – School District Funds – Subchapter G
- [Texas Business and Commerce Code](#)
- [Texas Local Government Code Chapter 171](#) – Regulation of Conflicts of Interest of Officers of Municipalities, Counties and Certain Other Local Governments
- [Texas Local Government Code Chapter 176](#) – Disclosure of Certain Relationships with Local Government Officials: Providing Access to Certain Information
- [Texas Local Government Code Chapter 271](#)
 - o Subchapter B – Purchasing and Contracting Authority of Municipalities, Counties and Certain Other Local Governments
 - o Subchapter D – State Cooperation in Local Purchasing Programs
 - o Subchapter Z – Miscellaneous Provisions
- [Texas Government Code Chapter 552](#) – Public Information
- [Texas Government Code Chapter 791](#) – Interlocal Cooperation Contracts
- [Texas Government Code Chapter 2054](#) – Information Resources
- [Texas Government Code Chapter 2157](#) – Purchase of Automated Information Systems
- [Texas Government Code Chapter 2251](#) – Payment for Goods and Services
- [Texas Government Code Chapter 2252](#) – Contracts with Governmental Entities
- [Texas Government Code Chapter 2254](#) – Professional and Consulting Services
- [Texas Government Code Chapter 2269](#) – Contracting and Delivery Procedures for Construction Projects
- [Texas Health and Safety Code Chapter 361](#) – Solid Waste Disposal
- [Texas Health and Safety Code Chapter 435](#) – Dairy Products
- [Texas Agriculture Code Chapter 150](#) – Imported Meat

THINGS TO REMEMBER:

1. Try to use an approved vendor at all times.
2. You may use an unapproved vendor for purchases under \$50,000 **if no approved source exists**.
3. If you spend over \$50,000 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 \$25,000 will go to the Chief of Staff. Requisitions over \$50,000 will go to the Executive Director of Finance and the Superintendent. Purchases over \$100,000 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. Vendors who are awarded district bids are considered Bid Approved Vendors. Other vendors can be added to Skyward that have not gone through the bidding process, but there is a limitation of \$10,000. Any purchases over that amount require 3 quotes.
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 PfISD; 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.

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

10. Adding Vendors - Forms to add a vendor can be found on the Procurement website in the Information for Employees section. All forms must be completed and returned along with a W9 and a CIQ 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.

13. **Food Service/Child Nutrition Program (SNP) Procurement Procedures:**

All procurements made with School Nutrition Program funds must comply with federal regulations under 2 CFR Part 200, USDA procurement requirements, and applicable state and local laws. When regulations conflict, USDA rules take priority. PfISD must ensure full and open competition, avoid conflicts of interest, and follow appropriate procurement methods (micro-purchase, small purchase, or formal procurement) based on the total cost. Written procedures must be in place for solicitation, bid evaluation, contract award, and recordkeeping.

Debarment checks, the Buy American provision, and documentation of cost reasonableness are required. All vendors, contractors, or third parties acting on behalf of PfISD must also follow these rules, and any noncompliant purchases are considered unallowable costs. For these requirements, the term, contract, applies to both legal contracts and operational agreements and applies to the District and third-party entities acting on behalf of the District to procure services and/or products.

To ensure compliance and protect program funds, the district will maintain strong internal controls throughout the procurement process. All purchases using school nutrition funds must follow approved procurement procedures designed to promote transparency and accountability, prevent fraud, waste, and improper payments, and ensure fair and competitive purchasing practices. Any costs resulting from improper or noncompliant procurement methods are unallowable and must not be paid from school nutrition program funds.

Roles & Responsibilities

The Procurement Director carries overarching responsibility for the district’s compliance with federal, state, and local procurement requirements. This role approves procedures, provides final authorization for solicitations, ensures enforcement of conflict-of-interest policies, and oversees program integrity.

The Procurement Coordinator manages the day-to-day execution of the procurement process, including developing solicitation documents, conducting bid advertisements, and coordinating evaluation committees to ensure open competition and transparency. This role is also responsible for maintaining comprehensive procurement records, overseeing documentation of the procurement history, and providing training and ongoing guidance to staff across campuses or departments engaging in procurement activities.

Procurement Buyers handle routine purchasing tasks, such as obtaining quotes, confirming correct procurement thresholds are used, validating vendor credentials, processing purchase orders, and ensuring all delivered products and services match contractual expectations. Their responsibilities include tracking vendor performance, maintaining detailed records for all transactions, ensuring all expenditures are properly coded, and promptly reporting any concerns or vendor non-compliance to the Coordinator or Director.

The Assistant Director of Budget ensures that funds are available and correctly coded prior to purchases, reviews contracts for budget alignment, monitors funding sources to confirm costs are allowable, and tracks commitments and encumbrances as contracts are executed. This role also collaborates with the Procurement Director to maintain fiscal controls, supports audit readiness, and manages reporting on contract expenditures and financial impact across grants and programs.

Cost Analysis

Before requesting quotes or bids, the district must complete a cost analysis. Using past purchase data, quotes, or other tools to estimate what the product or service should cost. The amount of detail needed will depend on how complex or large the purchase is. All records will be retained as required.

Micro-Purchases ($\leq$ \$15,000):

Although federal guidelines under 2 CFR 200.320 allow for micro-purchases without competitive quotations, the District requires a minimum of three informal quotes for all SNP micro-purchases to ensure price reasonableness and promote competition. This requirement applies even when selecting vendors from approved District bids or cooperative purchasing agreements.

Note: Obtaining multiple quotes for micro-purchases will effectively elevate the transaction to a Small Purchase under federal thresholds, and corresponding procedures must be followed.

Small Purchases (\$15,001 – \$100,000)

For all small purchases—including those made through cooperative purchasing agreements such as BuyBoard—written specifications must be developed prior to obtaining at least three competitive quotes. Documentation must include:

- Detailed product/service specifications
- Price quotes from at least three responsible vendors
- Justification for vendor selection

Formal Purchases ($\geq$ \$100,000):

Formal procurement procedures are required for SNP purchases equal to or exceeding \$100,000. The process must follow Texas Department of Agriculture (TDA) formal procurement methodology and District procurement guidelines. Formal methods include:

Competitive Sealed Bids (IFB)

Competitive Proposals (RFP)

State or Cooperative Purchasing Agreements, if allowable under federal and TDA requirements

All formal procurements must include:

Published public notice

Written specifications or scope of work

Documented evaluation criteria

Signed contracts or agreements

Board approval

Procurement files must be maintained and readily available for review by auditors or TDA reviewers.

Buy American Provision:

In accordance with 7 C.F.R. §§ 210.21(d) and 220.16(d), all School Food Authorities (SFAs) must purchase, to the maximum extent practicable, domestic agricultural commodities and food products.

A “domestic commodity or product” is defined as one that is grown and processed in the United States substantially from U.S.-produced agricultural commodities. Exceptions must be documented and justified in writing based on product availability or significant cost differences.

Refer to Board Policy COA (Legal) for additional compliance requirements related to School Nutrition Program procurement.

BYRD Anti-Lobbying Amendment (31 U.S.C. 1352)

In accordance with federal procurement requirements, all solicitations and contracts exceeding \$100,000 that utilize federal funds must include the BYRD Anti-Lobbying Amendment.

Policy Requirement:

Contractors are prohibited from using federal funds to influence or attempt to influence an officer or employee of any federal agency, a Member of Congress, or an employee of a Member of Congress in connection with the awarding of any federal contract, grant, loan, or cooperative agreement.

Process Requirement:

For applicable contracts, the vendor must complete and submit the following forms as part of the procurement process:

Certification Regarding Lobbying

Disclosure of Lobbying Activities (if applicable)

These forms must be retained in the contract file and are subject to audit or review to ensure compliance with federal regulations.

Failure to comply with the BYRD Amendment requirements may result in penalties, termination of the contract, and/or disqualification from future federal awards.

Material Change Requirements

Policy Requirement:

Per Texas Department of Agriculture (TDA) guidance, material change requirements apply to any procured agent or service provider. This ensures transparency, accountability, and continued compliance throughout the term of the contract.

Process Requirement:

Solicitations and resulting contracts must clearly define the scope of work and

the expected services to be provided by the agent for the full duration of the contract. This includes, but is not limited to:

Frequency and type of services to be delivered

Performance expectations and measurable deliverables

Any roles or responsibilities the agent is expected to fulfill

Any significant revision or deviation from the original scope of work after award may be considered a material change. Such changes may require:

Re-solicitation or new procurement action

Contract amendment with justification and proper approvals

Documentation to support continued allowability of the cost under federal procurement standards

Unnecessary or Duplication of Goods/Services

The District will avoid acquisition of unnecessary or duplicative items/services.

Purchases will be justified using the following criteria:

1. Purchaser will determine if there are like items in the District that may not be in use and consider transferring item before determining if purchase is necessary
2. The item is being considered for menus or is needed to serve, prepare, receive, transport or store an item on the menu
3. The item is replacing an obsolete, broken, damaged or outdated piece of equipment

Noncompliance and Disciplinary Action:

Misuse of School Nutrition Program funds or failure to comply with USDA procurement requirements may result in serious consequences. Under USDA regulations:

Individuals found to have intentionally misused SNP funds or violated procurement procedures may face disciplinary action, including employment termination, legal prosecution, and/or financial restitution. It is the responsibility of all staff involved in SNP purchasing to follow these procedures with integrity and transparency.

Conflict of Interest

Two District policies, CH (Local) and DBD (Local), address conflict of interest issues for employees of the District that have direct relationships with vendors, and vendors looking for opportunities to do business with the District.

District Employees

DBD (LOCAL) requires that a District employee is to disclose to their immediate supervisor any personal financial or business interest, or any other obligation or relationship that in any way creates a potential conflict of interest with the employee's duties and responsibilities. The employee has an obligation to the District to be transparent in such situations and disclose relationships with vendors for any procurement and always have the District's best interest in the forefront. Failure to do so will be considered a breach of District policy.

If the employee will be assisting the Purchasing Department in the evaluation of a solicitation, the employee will be required to complete and sign a Non-disclosure Statement for PfISD Employee Form. By signature, the employee affirms that they, their spouse or dependent(s), are not receiving any compensation from, nor have been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any proposal or involved proposers in return for favorable consideration.

Vendors

For vendors, CHE (LEGAL) requires that names of any PfISD employee who owns, directly or indirectly, an interest in their firm or any of its subsidiaries must be disclosed before the vendor does business with the District. If the vendor fails to do so, there may be grounds for disqualification of the bid or cancellation of a contract resulting from the Solicitation.

Conflict of Interest for Vendors with Future Business Interests

If the department chooses to hire or retain a vendor, even at no cost, to assist in any part of the procurement process (e.g. developing specifications or scope of work, helping evaluate responses to a solicitation, etc.), the vendor cannot have any personal or business interest in the outcome of the process.

The contractor should disclose at the beginning of their contact with the District they may have interest in any potential solicitors related to their project. If one does exist, they will have to withdraw from assisting in the solicitation development. If they do not, all of the vendor's employees assisting will be required to complete a Vendor's Nondisclosure Statement for Contracted Consultants Form. Any companies with this level of relationship will not be eligible for any business opportunities related to this engagement.

Access to Staff

Vendors will ask for access to District staff since they are paid to cultivate business. If the end user agrees to meet, District office visits are acceptable and is the suggested location. District personnel are not obligated to talk to vendors. Responses and communications should be professional and respectful. **Offsite meetings, meals, gatherings at coffee shops, bars, golf outings, etc., should be completely avoided and without consideration.** This can be conceived and is perceived as providing an advantage during the bid process. Again, allow all interested vendors the same access to you as all other vendors.

VENDOR PROTEST PROCEDURES

1. PROTEST A proposer protesting the RFP for any reason, including the RFP procedure, the district's objection to proposer, or a person or entity by the proposer, the award of the contract or any other aspect arising from or relating in any way to the RFP shall cause a written protest to be filed with the District within five (5) days of the event giving rise to the protest and in any event, no later than five (5) business days after the date upon which the bid is awarded and vendors are notified. The written protest shall include the name of the

protesting bidder, a detailed description of the specific grounds for protest, copies of all supporting documents, and the specific relief requested. Protests shall be delivered to Chief Financial Officer, Pflugerville ISD, 1401 W Pecan, Pflugerville, TX 78660.

2. CONTENTS A protest must be in writing and shall state all grounds upon which the protesting party asserts the RFP or contractor (vendor) selection was improper. The proposer protesting may submit any documents or information it deems relevant.

3. CONSIDERATION Upon receipt of the written protest, the District will consider the protest. The District may, within five (5) business days of the receipt of the protest, provide any other affected proposer(s) the opportunity to respond in writing to the protest. A proposer protesting may respond to the District's reply within five (5) days of the District's response. If the protest is not resolved by mutual agreement of the District and the protesting proposer, the Superintendent of the District will review the issues and promptly furnish a final and binding written decision to the protesting proposer and any other affected proposer(s). within twenty (20) business days of the District's receipt of the protest. If more than one protest is filed, the District's decision will be provided within twenty (20) business days of the District's receipt of the last protest. 4. WAIVER Failure to comply with these protest procedures will render a protest waived.

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

For Food Service, Technology, Athletics or Bond questions contact:
JANIE ORNELAS, Director of Procurement & Auxiliary Services –
512-594-0074 Guadalupe.ornelas@pfsd.net

For Elementary, Police, Transportation, Furniture, Asset Management or Procurement questions contact
NICOLE AYER, Procurement Coordinator – 512-594-0075
Nicole.ayer@pfsd.net

For Secondary Schools, and Fine Arts
questions contact:

Liz Delgado

Buyer– 512-594-0072
Liz-Maria.delgado@pfsd.net

For Admin, EDP, CTE, Support Service
or SPED questions contact:

FRANCISCA JIMENEZ, Senior
Buyer – 512-594-0089
Francisca.jimenez@pfsd.net

Procurement Staff Responsibilities

- Ensure that requisitions are entered with required information.
- Confirm supporting documentation is attached.
- Confirm that account codes are correct and follow up with finance if there are any questions.

Tools used for comprehensive cost/price analysis

- Comparison of competing quote- 3 quotes
- Comparison to historical prices- within 5% of past procurement
- Catalog Pricing- Reviewed during bid process

Frequently Asked Questions – Purchasing

1. How do I find purchasing related information?

Purchasing related information can be found on the district's website homepage by selecting Departments, then Procurement Auxiliary Services. Links on the left side of the main page will connect you to current Bid Tabulations as well as information regarding local policies and Helpful Information for District Employees.

2. How can you track a purchase order?

Skyward allows you to keep track of your purchase orders without having to print them out. Please use the filters that Skyward provides to create, track and close out all of your Purchase Orders. If for some reason you are unable to locate your requisition, contact your procurement buyer.

3. 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, Procurement and Auxiliary Services, Information for Employees**, and choose **Approved Vendor List**. You can search by bid category or vendor name. All approved vendors (both PflISD Bid Approved and Co-op) are listed. If you cannot locate the vendor, you are looking for, call the Purchasing Department.

4. 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.

5. Can we buy from vendors at conventions?

If you are using a purchase order, and the purchase is less than \$1,000, you can. If you are going to use a pay request, you must follow the guidelines specific to use of a pay request.

6. 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.

7. 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 \$100,000 in *aggregate* in one school year. Last year, the district has spent approximately \$900,000 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.

8. 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.

8. Are we allowed to purchase gift cards?

Whereas gift cards fall under the unallowable list on PFISD Finance procedures, a new amendment has been added that you can purchase gift cards **IF** it is for your campus 461 Sunshine fund purchases. Please follow this link for more information. Only account codes ending with 704 will be approved for gift cards. PFISD also allows gift cards for the McKinney Vento Act.

<https://www.pfisd.net/about-us/departments/finance/finance-procedures>.

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 \$50,000 but less than \$100,000, 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.

Chief of Staff approves all purchase orders of a value that are between \$25,000-\$49,000

Superintendent approves all purchase orders of value that are more than \$50,000.

Executive Director of Finance approves all purchase order of value that are more than \$100,000.

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	Chief of Staff	Superintendent Executive Director of Finance	Board of Trustees
\$0-\$4,999.99	✓	✓			
\$25,000 - \$49,000	✓	✓	✓		
\$100,000 +	✓	✓		✓	✓

Annual Aggregate

The following guidelines apply to the TOTAL requisition amount, not just the cost of a particular item, and includes any shipping / freight costs.

The aggregate amount, is defined locally by the school district by identifying “like-types” of purchases. The aggregate is then calculated across all school district’s fiscal year “like-type” purchases. The aggregate amount is NOT a single purchase or single purchase order.

Pflugerville ISD requires that campuses and departments reference an awarded contract when creating a requisition. An Awarded Vendor List containing all currently awarded vendors is available on the Pflugerville website under information for employees.

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.

PURCHASING CODE OF CONDUCT

CODE OF CONDUCT

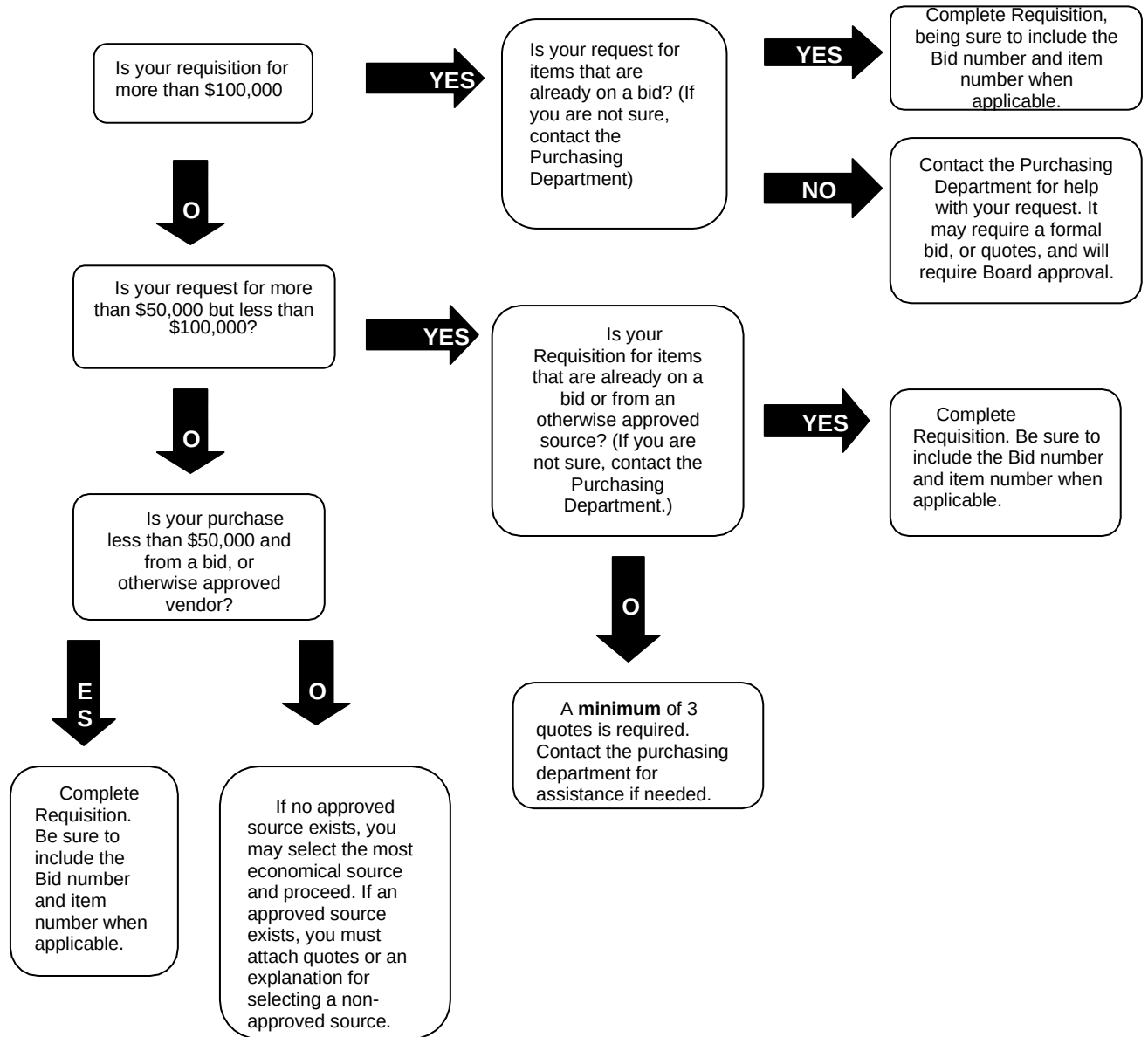
- Avoid the intent and appearance of unethical or compromising practice in relationships, actions and communications.
- Demonstrate loyalty to the District by diligently following the lawful instructions, procedures and policies using reasonable care while exercising only the authority, which has been delegated to you.
- Refrain from any private business or professional activity that would create a conflict between personal interest and the interests of the District.
- Refrain from soliciting or accepting money, loans, credits, discounts, gifts, entertainment, favors or services from present or potential vendors.
- Handle confidential or proprietary information with due care and proper consideration of ethical and legal ramifications and government regulations.
- Promote positive supplier relationships through courtesy and impartiality.
- Know and obey the letter and the spirit of laws governing the purchasing function and remain alert to the legal ramifications of all purchasing decisions.
- Ensure that all segments of society have the opportunity to participate in governmental contracts.
- Enhance the stature of the purchasing profession by improving technical knowledge and adhering to the highest ethical standards.

Violation of any policies, regulations, or guidelines, including making a false claim, offering a false statement, or refusing to cooperate with a District investigation, shall result in disciplinary action, including termination of employment.

Frequently Used Vendors

1. **Amazon** – Make sure you process quickly; Amazon price is only guaranteed for 14 days including Saturday and Sunday. Vendor # 293625036
2. **Apple** – V# 000003268 for all purchases. Vendor#7879 to be used for iTunes vouchers or can use V#00003268. (Do not use V#00003272 – Apple Store (in The Domain) - not on DIR Contract.)
3. **Barnes & Noble** – Use PO number and call store #00007875, if items need to be ordered they order them for us. Remember to leave contact information for orders to be picked-up. Vendor # 000007875
4. **Best Buy** – Two Vendors:
00009292-**Unapproved**- Local store for purchases under \$50 only.
Will not accept PO's.
00009299- BestBuy.gov – Approved through a government Co-op.
Must call 612-292-0268 or email: Jeremy at Jeremy.como@bestbuy.com for a quote. Enter PO then contact Jeremy again with PO # and where you would like to make a pick up. Orders can also be delivered to your campus.
5. **Dell**- Dell Marketing – Use for all purchases. All PO's must reference an e-quote number which is acquired through the Dell Premier Website. Vendor # 000018163 Please see your bookkeeper for further information.
6. **Mastercard- HEB** – Vendor#300004478 - Enter a blanket PO. Take Mastercard to HEB. Be sure to fill out a tax exempt form at the store.
7. **Home Depot** – Three vendor numbers. Each campus will use the Mastercard. Please use the number that corresponds with your campus card as listed below:
Vendor#000029402
Vendor#000029398
Vendor#000029399
Check with your bookkeeper if you are unsure of which to use.
8. **Hobby Lobby** – Enter a blanket PO. The Vendor name will be Hobby Lobby Store, Inc. Vendor # 000028852. In your description, please add that you are using your campus Mastercard for the purchase.
9. **ODP** – You can order online, but **all online orders must be over \$50**. Vendor #300004021. If you are going to the store, you need to take the campus Mastercard and PO (PO not required under \$50.00, but need pre-authorization form to send to finance w/receipt & voucher)
10. **Target** – Not approved and will no longer accept Purchase Orders.
11. **Walmart**- Purchases over \$10,000 require quotes. Please create a PO for purchases. Vendor # 000065000 May use your campus credit card .**Cannot use online ordering with Walmart.com.**
12. **Sams Club**- Campus is responsible for purchasing yearly membership. Please go in person to set up your account. Please create a blanket PO and use your campus Mastercard for these purchases. Vendor # 300005424

PURCHASE ORDER DECISIONS



Guide 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.