

Administrators Operating Guide is intended to supplement and define Board policies, serve as administrative regulations and official directives.

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CENTRALIZED PURCHASING

7.1 INTRODUCTION

TISD is dedicated to the concept of Centralized Purchasing to help ensure continued compliance with the many laws and regulations governing purchases made by school districts in the State of Texas. A number of dollar-limit thresholds apply not only to the TISD, but also to individual schools, departments and organizations.

The fulfillment of the education program of the district is facilitated by the maintenance of a centralized purchasing system. To improve the administrative procedures of this organization and enhance the quality of service it can render to instructional and staff departments, all contacts with potential or approved vendors by employees of the district shall originate in the Purchasing Department. Vendors shall be informed that established administrative procedure requires that the buyer responsible for the purchase of the specific commodity, or his or her supervisor, be informed of all contacts at inception.

Purchasing Authority

The Board delegates to the Superintendent or designee the authority to determine the method of purchasing, in accordance with CH(LEGAL), and to make budgeted purchases.

- All awards must be approved by the Director of Purchasing
- Purchases and contracts for expenditures of \$50,000 and higher must be approved by the Board of Trustees prior to the award if for a new program/project.
- The Board has approved purchases pursuant to the terms of Inter local agreements to which the district is a party.

UNAUTHORIZED PURCHASES

The Board shall assume responsibility for debts incurred in the name of the District so long as those debts are for purchases made in accordance with adopted Board policy, current administrative procedures, and applicable law. The Board shall not be responsible for debts incurred by persons or organizations not directly under Board control; persons making unauthorized purchases shall assume full responsibility for all such debts.

District employees shall not purchase supplies or equipment for personal use through the District's business office or other purchasing methods.

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7.2 ACQUISITIONS

PURCHASES VALUED AT OR ABOVE \$50,000

Except contracts for the purchase of produce or vehicle fuel, contracts valued at \$50,000 or more in the aggregate for each 12-month period shall be made by the method that provides the best value for the District. The Board has authorized the following purchasing methods:

- competitive bidding;
- competitive sealed proposals;
- a request for proposals, for services other than construction services;
- a catalog purchase as provided by Government Code Chapter 2157, Subchapter B;
- an interlocal contract;
- a design/build contract;
- a contract to construct, rehabilitate, alter, or repair facilities that involves using a construction manager;
- a job order contract for the minor construction, repair, rehabilitation, or alteration of a facility;
- the reverse auction procedure as defined by Government Code 2155.062(d).
- the formation of a political subdivision corporation under Local Government Code 304.001.

In awarding a contract, the District may consider:

- the purchase price;
- the reputation of the vendor and of the vendor's goods and services;
- the quality of the vendor's goods or services;
- the extent to which the goods or services meet the District's needs;
- the vendor's past relationship with the District;
- the impact on the ability of the District to comply with laws relating to historically underutilized businesses;
- the total long-term cost to the District to acquire the goods or services; and/or
- any other relevant factor specifically listed in the request for bids or proposals.

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7.2 ACQUISITIONS (continued)

Tie Bids:

- If the District receives two or more bids from responsible bidders that are identical, in nature and amount, as the lowest and best bids, it shall select only one bidder from the identical bids.
- If only one of the responsible bidders submitting identical bids is a resident of the District, that bidder shall be selected. If two or more such bidders are residents of the District, one shall be selected by the casting of lots. In all other cases, one of the identical bids shall be selected by the casting of lots.
- The Board shall prescribe the manner of casting lots and shall be present when the lots are cast. All qualified bidders or their representatives may be present at the casting of lots.

SOLE SOURCE PURCHASES

Compliance with Section 44.031 of the Education Code is not required for purchases that are available from only one source, including:

- An item for which competition is precluded because of a patent, copyright, secret process, or monopoly.
- A film, manuscript, or book.
- A utility service, including electricity, gas, or water.
- A captive replacement part or component for equipment.
- The sole source exception shall not apply to mainframe data processing equipment and peripheral attachments with a single-item purchase price in excess of \$15,000.

INTERLOCAL AGREEMENTS

To increase the efficiency and effectiveness of purchasing operations, the District may contract or enter into agreement with other local governments and with state agencies, to perform some of its purchasing functions. *Gov't Code 791.001, 791.011*

The District may agree with another local government, including a nonprofit corporation that is created and operated to provide one or more governmental functions and services, or with the state or a state agency, to purchase goods and services reasonably required for the installation, operation, or maintenance of the goods. Such an agreement may not, however, apply to services provided by firefighters, police officers, or emergency medical personnel.

A district that purchases goods and services by agreement with another local government or with the state or state agency satisfies the requirement to seek competitive bids for the purchase of goods and services.

CONSTRUCTION OF SCHOOL FACILITIES (SEE SECTION 12.4)

PROFESSIONAL SERVICES (SEE SECTION 12.1)

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7.3 GUIDELINES

All purchases shall be made in accordance with the following guidelines:

Any material, supply, non-professional service or equipment requested shall be purchased by creating a requisition in TEAMS, provided that funds exist in the current year's approved budget. TEAMS provides a hierarchy of approvals including supervisors, the Assistant Superintendent of Finance & Operations or Executive Director of Financial Services, and the Coordinator of Purchasing/Risk Management. Any one of the above may reject the requisition and the reason will be provided in TEAMS. When the requisition becomes a Purchase Order, the originator of the requisition in TEAMS will be notified by email; shortly thereafter, a subsequent email will allow the originator to print the original Purchase Order.

Purchase of any material, supply, non-professional service, or equipment obligating the Board of Trustees of TISD shall be made **only** upon the issuance of a Purchase Order or contract, except for **emergency** conditions as defined below.

Purchase Orders should be checked on a regular basis to ascertain their status. Purchase Orders that remain open beyond 120 days will be subject to cancellation unless the requestor shows justification for extension.

Non – Budgeted Expenditures

An individual purchase of any quantity of a specific item that is not included in an organization's annual spending plan, shall be made only upon prior approval by the Assistant Superintendent of Finance & Operations.

Split Purchase Orders

Purchases of like items may not to be divided to avoid the approved dollar limitations prescribed by law and or local policy. Quantities of like items are to be consolidated into a single purchase request whenever possible and such purchases shall be considered cumulatively during the fiscal year.

Component Purchases

"Component purchases" means purchases of the component parts of an item that in formal purchasing practices would be purchased in one purchase.

Separate Purchases

"Separate purchases" means purchases of items made separately that, in normal purchasing practices, would be purchased in one purchase.

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[7.3 GUIDELINES, CONT'D](#)

Sequential Purchases

“Sequential purchases” means purchases, made over a period of time, that in normal purchasing practices would be purchased in one purchase.

Approved Vendors

Please consult the Purchasing Department if there is any doubt about the status of a vendor. *Vendor Analysis* reports may not include current approved vendors for a particular item.

Credit/Charge Accounts

Only the Director of Purchasing has the authority to establish or open credit/charge accounts for use by District personnel. Any account so established must be in the name of Tyler Independent School District. No individual school or organization may maintain an account and obligate public funds for its exclusive benefit or use.

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[7.4 Technology Purchases](#)

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7.4.6 RECEIPT, INVENTORY TRACKING & DELIVERY

7.4.7 TEAMS FIXED ASSET REQUISITION/PO PROCEDURES

7.4.1 PURPOSE

The purpose of this guideline is to establish a uniform process for the selection, purchase, delivery and installation of technology products. Additionally, this guideline establishes the process for maintaining an accurate inventory record for all TISD technology products, seeks to respect all computer software copyrights and to adhere to the terms of all software licenses to which the district is a party.

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[7.4 Technology Purchases \(continued\)](#)

7.4.2 DEFINITIONS

Technology refers to any digital system of hardware, software, supply, component, module, and infrastructure or maintenance contract used for instructional or managerial purposes in the district regardless of the funding source or cost. Examples of technology include, but are not limited to, computers, cameras, printers, ebook readers, cabling, projectors, telephones, switches, routers, etc.

7.4.3 TECHNOLOGY PURCHASE OR LEASE REQUEST

All requests for purchase or lease of technology must begin with the customer placing a work order. Work orders are placed using the Eduphoria Help Desk application (<https://eduphoria.tylerisd.org>) menu # 10. Pricing and Purchasing. The work order creates a record of the request and forwards it to the Technology Purchasing & Project Coordinator. The customer will receive an E-mail confirmation of the work order and can track the progress of the work order through the Help Desk application.

7.4.4 TECHNOLOGY REQUEST REVIEW

All requests to purchase or lease technology will be reviewed by the Director of Technology Services. The Executive Director of Curriculum, Instruction and Staff Development will be involved in the review process if the request is related to instructional technology. Each request will be analyzed to determine if it is compatible with the district's existing systems and, if applicable, with the district's curriculum. Technology Services will determine the best vendor, pricing, configuration, procurement standards, budget availability and installation contractor as necessary. The Director of Technology Services will provide the customer with written authorization to proceed with the purchase or reason for denial of the purchase.

7.4.5 PURCHASE ORDER PROCESSING

Once purchase is approved, the customer will create a Purchase Order Request in TEAMS. The Work Order number associated with the original request must be on the PO. Technology Services will be available to assist with the creation of the PO. All PO Requests will be reviewed to ensure accuracy and completeness. All technology purchases must go through the purchase order process and not involve direct pays, short form purchase orders, district credit cards, or employee reimbursement. Items not associated with a purchase order will not be paid by the district without the written approval of the Director of Technology Services. The Technology Service Center is exempt from this requirement.

7.4.6 RECEIVING, INVENTORY TRACKING, DELIVERY AND INSTALLATION

All technology orders will be delivered to the Fixed Asset Department where they will be received, bar coded, entered into the Fixed Asset system and/or Hayes Inventory system, and then sent to the Technology Service Center for configuration and installation or to the customer as appropriate. Technology Services will coordinate installation with outside contractors when necessary.

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[7.4 Technology Purchases \(continued\)](#)

7.4.7 TEAMS Fixed Asset Requisition/PO Procedures

Ship To Location: ALL fixed assets should have 731 as the ship to/delivery location so that they are delivered to the warehouse for the Coordinator of Fixed Assets to tag. Purchasing will be reviewing this and denying fixed assets that do not properly have 731 selected as the ship to location.

Requisitions Cannot Combine Unrelated Items in One Cart/PO

There must be a one-to-one relationship to accommodate the TEAMS Fixed Asset system. You can't have unrelated items that are not part of the asset(s) in the same cart/requisition/PO. See below for examples:

Incorrect: Projectors, Unrelated installations, etc., all entered in one cart resulting in one PO.

Example- 3 projectors, 5 installations for projectors, 2 installations for smartboards already purchased)

Example- 5 switches with varying amount of components that do not equally correlate to the number of switches

Correct: Projectors and the related installation should be in cart/PO if the same vendor is providing the installation using either 6395 or 6639 depending on price

Example- 2 projectors and 2 installations in one cart.

Example- 5 switches, and five of the various components that relate to each switch should be in the cart. – If they are different types- do a separate PO/cart for each type with the correct amount of items.

Note: If another vendor is used for installation, it should be on a separate PO coded to 6249.

If the installation is included in the PO for the asset(s) acquisition, then it should be coded to the fixed asset code 6395 or 6639

IPAD Purchases Individual iPads must have Apple Care, coded separately to 6249.

If a package of a group of 10 is purchased, the vendor includes the Apple care so it is all entered to 6395 as a quantity of 1 unit.

Consulting, Support, Maintenance, etc. Do NOT code to fixed asset 6395 or 6639. They should be coded to the correct object for the applicable service, typically 6249.

Percentages Please do not use percentages to split codes on the requisitions 50:50, 70:30, etc. It causes problems in Accounts Payable. You can split codes using dollar amounts with a separate line for each account code.

7.5. State & Federal Purchasing Procedures

See Section 15 Grants and Entitlements section.