

Frisco ISD Purchasing Department Handbook

(REV. 09.15.2026)

The Purchasing Department builds vendor relationships to buy goods and services for FISD in compliance with state and federal laws and local policies and procedures. We are responsible for district-wide procurement for education, research, and business initiatives.

Purchasing's handbook outlines standard procedures for staff managing the "purchase to pay process" (*see also* *TEA's Financial Accountability System Resource Guide (FASRG)*, *EDGAR*, and *The Administrator's Reference Manual* (TDA ARM), & *Board policies*). It ensures are consistent and follow all applicable regulations. The manual is updated biennially to reflect changes in practices and legislative or policy updates.

The handbook includes:

- Standards of conduct, including ethics and conflicts of interest
- Purchasing goals and objectives
- Relevant statutes, regulations, and board policies
- Purchasing authorities
- The purchase to pay process (requisitions, POs, change orders)
- Contract management, vendor risk assessment, and contract monitoring
- Receiving requirements
- Bid and proposal forms
- Guidance on minor (e.g., low dollar, quotes, spot purchases) and major (e.g., high dollar and/or complex) purchases

Annual Ethics Statement

Purchasing staff review and acknowledge ethical standards annually, integrating them into all FISD purchasing functions. We foster strong vendor relationships, promoting open competition, and ensuring impartiality in procurement.

Purchasing communicates ethical standards regarding conflicts of interest, financial interests in vendor firms, and the acceptance of gifts to district staff, as needed. We understand the penalties for violating purchasing laws, including criminal prosecution and job loss. *Staff must be familiar with FISD Board policies on conflicts of interest and ethics.*

Common standards of ethics (from FASRG 5.2). Common ethical standards for purchasing department staff are as follows:

- It is a breach of ethics to attempt to realize personal gain through public employment with a school district by any conduct inconsistent with the proper discharge of the employee's duties.

- It is a breach of ethics to attempt to influence any public employee of a school district

to breach the standards of ethical conduct set forth in this code.

- It is a breach of ethics for any employee of a school district to participate directly or indirectly in a procurement when the employee knows that:
    - the employee or any member of the employee's immediate family has a financial interest pertaining to the procurement.
    - a business or organization in which the employee, or any member of the employee's immediate family, has a financial interest pertaining to the procurement; or
    - any other person, business, or organization with whom the employee or any member of the employee's immediate family is negotiating or has an arrangement concerning prospective employment is involved in the procurement.
- It is unethical for any employee or former employee of a school district to offer, give, solicit, demand, accept, or agree to accept any gratuity or employment offer in connection with decisions, approvals, recommendations, program requirements, procurement, specifications, advice, investigations, audits, or any other matter related to contracts, subcontracts, or pending solicitations.

Acceptance of gratuities may be construed as a criminal offense.

- It is a breach of ethics for any payment, gratuity, or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor or higher tier subcontractor for any contract of a school district, or any person associated therewith, as an inducement for the award of a subcontract or order.
- The prohibition against gratuities and kickbacks prescribed above should be conspicuously set forth in every contract and solicitation, therefore.
- It is a breach of ethics for any employee or former employee of a school district knowingly to use confidential information for actual or anticipated personal gain, or for the actual or anticipated gain of any person.

Frisco ISD Purchasing Department Ethics and Confidentiality Certification

I, [Name] _____, as a staff member of the FISD Purchasing Department, certify that I understand and agree to the following commitments:

Conflicts of Interest.

- I will not disclose information from FISD procurement processes that could create conflicts of interest or appear improper
- I will promptly report any actual or potential conflicts to FISD
- I will not participate in procurement activities involving vendors where I or my immediate family members (spouse, parents, siblings, children) have financial interests or employment
- I will not participate if I am currently employed by or compensated by any vendor

Gifts and Conduct.

- I will not solicit or accept valuable items from vendors
- Any received vendor gifts must comply with FISD gift policies
- I will act independently and without external pressure in all procurement processes
- I will not accept gifts, loans, or favors in exchange for favorable consideration

Fair Treatment and Confidentiality.

- I will remain impartial and treat all potential vendors equally
- I will ensure specifications and evaluations are unbiased
- I will maintain procurement information confidentiality
- I will only share information with authorized FISD staff following proper procedures

I confirm that I have reviewed and understand both this certification and FISD purchasing ethics policies.

Signature: _____ Date: _____

Laws, Policies, Procedures & Violations

State law imposes criminal penalties for violations of purchasing requirements, as outlined in the *Texas Education Code (TEC) §44.032* and the *Texas Local Government Code §271.029*. The Texas Penal Code, Chapter 36, addresses corrupt influence violations. A public servant commits an offense if they solicit or accept benefits related to contracts or transactions they oversee. Offering a benefit to a public servant that is prohibited by law constitutes a Class A misdemeanor.

References: Texas Education Code (TEC), §44.032; Texas Local Government Code, Chapter 171, Chapter 176, and *§271.029; Texas Government Code, §2155.062(d); Texas Penal Code, Chapter 36*

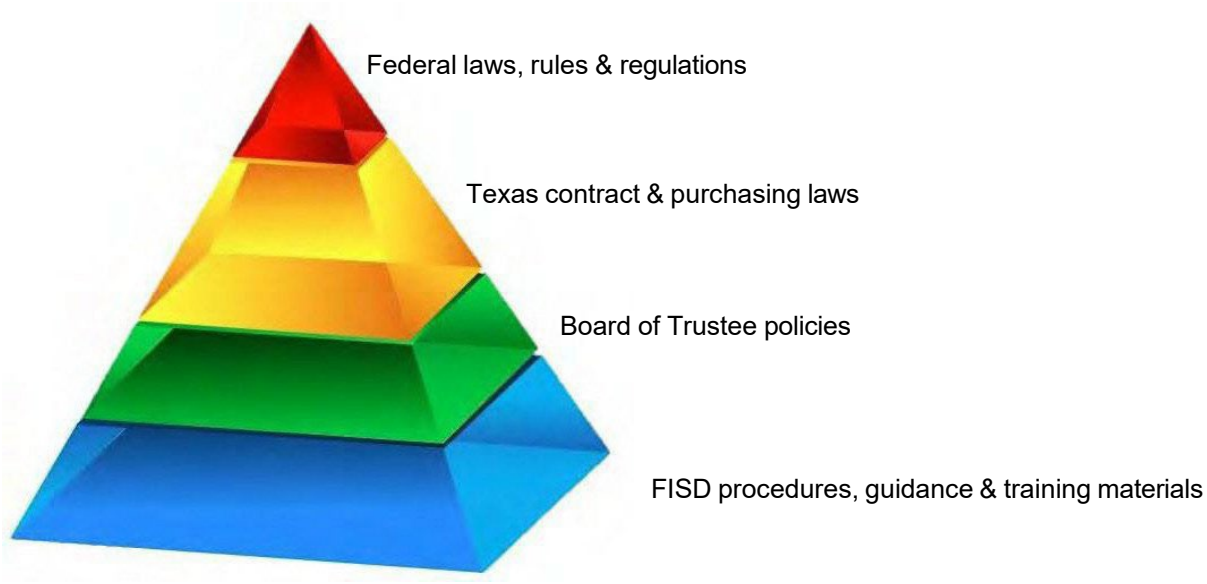


FIGURE 1: Federal and State Laws and Local Purchasing Policies and Procedures

Procedures, Manuals, Guidance & Training Materials. The following training guides and manuals govern the activities of the Department:

- Purchasing Department Desk Manual
- Business Services Training Guide (Purchase to Pay Process)

Frisco ISD's *Child Nutrition Purchasing Procedures* are included by reference. If any local procedure manuals or training materials conflict with FISD Board policy, the Board policy takes precedence. If the training materials or procedures do not address a purchasing or contracting procedure, then Board policy and applicable state and federal laws apply.

Board of Trustee Policy. The policies listed below pertain specifically to Purchasing. The complete *FISD Board of Trustee* policy book is available on the FISD website. LEGAL policies encompass federal and state laws and court decisions, providing statutory context for all other policies. LOCAL policies reflect decisions made by Trustees. If any Board policy conflicts with state or federal law, the law prevails. If the Board policy is silent on a topic, state and federal law should guide the purchasing decisions.

TABLE 1: Frisco ISD Purchasing Board Policy	
CH(LEGAL) Purchasing and Acquisition	CH(LOCAL) Purchasing and Acquisition
CHE(LEGAL) Purchasing and Acquisition: Vendor Relations	CJ(LEGAL) Contracted Services
CJ(LOCAL) Contracted Services	CJA(LEGAL) Contracted Services: Criminal History
CJA(LOCAL) Contracted Services: Criminal History	COA(LEGAL) Food and Nutrition Management: Procurement
COA(LOCAL) Food and Nutrition Management: Procurement	CVA(LEGAL) Facilities Construction: Competitive Bidding
CVA(LOCAL) Facilities Construction: Competitive Bidding	CVB(LEGAL) Facilities Construction: Competitive Sealed Proposals
CVB(LOCAL) Facilities Construction: Competitive Sealed Proposals	CVC(LEGAL) Facilities Construction: Construction Manager-Agency
CVD(LEGAL) Facilities Construction: Construction Manager-At-Risk	CVE(LEGAL) Facilities Construction: Design-Build
CVF(LEGAL) Facilities Construction: Job Order Contracts	

The following Texas State laws govern a District's purchasing and contracting activities. Federal law takes precedence over state law in case of conflicts. When state law is silent on purchasing or contracting, federal law applies.

Texas Administrative Code (TAC) 109.41: Adopts the Financial Accountability System Resource Guide (FASRG), which mandates rules for Texas public and charter schools.

Texas Education Code (TEC) Title 2 Chapter 44 Subchapter A: Covers school finance and fiscal management for school districts.

Texas Government Code (TGC) Title 7 Chapter 791 Subchapter A (interlocal agreements);*Title 10 Subtitle F Chapter 2254 Subchapter A*(professional and consulting services); *Title 10 Subtitle D Chapter 2155 Subchapter A* (general purchasing rules and procedure); *Title 10 Chapter 2157 Subchapter A* (automated information systems); *Title 10 Subtitle F Chapter 2269* (contracting and delivery procedures for construction projects).

Texas Local Government Code (TLC): Chapters 171, 176, and 271 address conflicts of interest, disclosure of relationships with local government officers, public access to information, and purchasing authorities of local entities.

Texas Penal Code Chapter 36: Addresses bribery and corrupt influence.

Federal Laws. 2 CFR 200: Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards.

Annual Aggregating of Expenditures

"Aggregate" in TEC §44.031(a) refers to the total expenditures for similar goods and services that would typically be purchased together over a 12-month period (July 1 to June 30). Purchasing analyzes a full fiscal year's expenditures (i.e., identifies purchase amounts in the aggregate) to plan small purchases (less than $100K) and formal solicitations for the upcoming year.

Commodity Codes & General Ledger. We use United Nations Standard Products and Services Codes (UNSPSC) to categorize purchases. We review general ledger (GL) data to make informed decisions about purchase methods, as well.

Periodic Review. Purchasing conducts quarterly reviews of purchase data to ensure spending in any category does not exceed $100,000 unexpectedly. When a requisition is submitted for an "under $100K" purchase, the vendor team reviews expenditures and commodity codes. If total spending in a category is under $100,000, the requisition may be processed as an "under $100K" purchase. If total spending exceeds $100,000, the Vendor Team must determine the appropriate purchasing method. The review of aggregate expenditures is documented in eFin. If necessary, the Vendor Team will notify the Bidding Team to prepare a formal competitive solicitation.

An "under $100K" approval is temporary. Vendors are encouraged to respond to FISD solicitations to maintain their access to FISD "customers".

Competitive Purchasing

Large Purchases. Except as provided by TEC 44, Subchapter B, all district purchases of goods and services, except for the purchase of produce or vehicle fuel, valued at $100,000 or more in the aggregate for each 12-month period, shall be made by a method stated in TEC 44.031.

TABLE 2 below lists allowable purchase methods for purchases of $100,000 or more (formal).

TABLE 2: Purchase Methods in TEC 44.031		
Method	What are we buying?	Competitive or Noncompetitive
Competitive bidding	Services (not construction)	Competitive (formal)
Competitive sealed proposals	Services (not construction)	Competitive (formal)
Request for proposal	Services (not construction)	Competitive (formal)
Interlocal	Goods & services (not construction) from state, local governments and ISDs.	Non-competitive (informal)
Methods from TGC 2269	Construction services	Competitive (formal)
Political subdivision corporation	Electricity	Non-competitive (informal)
Reverse Auction	Services other than construction	Competitive (formal)

Exceptions to competitive purchasing are listed in TEC 44.031, but getting competitive pricing is always recommended regardless of purchase size or the vendor type (see sections on interlocal agreements, purchases from city and county government, DIR, FASRG 5.10, sole source, etc.).

Small Purchases. School districts can establish additional requirements for small purchases. These can be more but not less restrictive than those established by state and federal law. For FISD, purchases valued at $50,000 or more over a 12-month period must be best value for Frisco ISD. We must have at least two quotes or estimates for a purchase of $50,000 or more. **TABLE 3** below summarizes FISD quote requirements.

TABLE 3: FISD Quote Requirements		
Purchase Amount	Document(s) Needed	Rule
$0 to $4,999	No quote	FISD policies & procedures
$5,000 to $49,999	1 quote	FISD policies & procedures
$50,000 or more	2 quotes & *Best Value Form*	TEC §44.031

Federal agencies, including the Department of ED, require districts receiving federal funds to have one set of purchasing policies, regardless of the funding source—federal, state, or local. All purchases must adhere to the same quote rules as those for federal funds.

For purchases of $100,000 or less, we use the following terms or phrases:

- Under $100K
- Purchase below the SAT (simplified acquisition threshold)
- Small purchases
- Micro-purchases*
- Informal procurements
- Competitive request for quotes (quote request)

Review of Required Quotes. Quotes must be attached to requisitions processed in e-Fin. Purchasing reviews attachments to ensure the appropriate number of quotes are included and, if necessary, a best value form is attached (see **Attachment 4** for requisition review information).

Additional Considerations.

- Get Help. Staff can request help with quotes using the Purchasing Help tile in the staff portal.



- Competitive FISD Bids. A purchase from a vendor on a competitive RFP satisfies quote requirements: no additional quote is needed. (this is an RFPs on which one vendor was awarded).

- Catalog and other RFPs with multiple vendor awards. If a purchase is made from a vendor on a catalog or Multiple Service Award (MSA) RFP, quotes must be provided.

- EDGAR-Compliant Cooperatives. For a purchase from a vendor on an EDGAR-compliant purchasing cooperative, end users must still gather quotes to comply with Frisco ISD policies.

- Purchases Under $100,000. For purchases under $100,000, quoting requirements must be met. The vendor team reviews the District's aggregate spending on defined categories of goods and services for “under $100K” purchases. Under $100K vendors are on bid hold to ensure additional review occurs before a purchase is made.

- Contracts of $100,000 or more must be approved by the FISD Board of Trustees. Purchasing may request additional information from FISD staff (due diligence) for large purchases. (See Risk Assessment and Contract Monitoring section)

Non-Competitive Purchases

FASRG 5.10. Certain purchases are non-competitive according to FASRG, Module V, Section 5.10. A non-competitive purchase is not the same as a sole source purchase. For goods or services available from only one vendor, follow the procedures for approving sole source vendors.

Generally, non-competitive purchases under *FASRG 5.10* are limited to less than $100,000 in total over a 12-month period. If FISD plans to spend $100,000 or more with one vendor, or if total expenditures for the year will reach $100,000, additional review is required. The following

purchases are classified as non-competitive (*FASRG 5.10, pgs. 27-29*):

When Non-Competitive Purchasing Is Allowed. Governmental Entity. Services only available through a government agency (local, state, or federal) where no interlocal agreement exists and the district must meet legal requirements. If the contract will exceed the threshold annually, secure a formal interlocal agreement.

Example: Purchasing goods or services directly from a university where FISD doesn't have a Board-approved interlocal agreement. These purchases may be mandated but aren't necessarily sole source.

Student Independent Educational Evaluation (IEE).Federal law (34 CFR §300.502) gives parents the right to request an independent evaluation at public expense if they disagree with the district's evaluation. Parents may choose the provider, and the district should honor that choice. *IDEA and other protected groups' legal requirements override standard purchasing procedures. FISD follows guidance from our legal team to ensure compliance. When parents select an independent evaluator, purchasing will create a one-time vendor for that evaluation.*

Professional Organization Fees. Employee memberships in professional organizations, registration fees for school-related events, or fees for UIL and other school competitions. If annual fees to one organization exceed the threshold, administration should provide written justification for choosing that organization.

This covers required fees for staff to participate in organizational functions but doesn't include purchasing goods from the organization. UIL competition judges hired for scoring purposes are also included. However, this doesn't cover accompanists for concerts or consultants hired to improve student performance—those must be procured competitively or through Trekorda (our contracted professional musician booking service).

Assembly, Seminar, or Workshop. Uniquely designed or copyrighted events hosted by individuals trained in specific disciplines who aren't government employees. If the event or series of identical events exceeds the threshold annually, follow competitive procurement rules.

This exception only applies when spending stays below the threshold. FISD spends well over $100,000 annually on professional development, so this exception rarely applies. It would only apply when FISD jointly hosts an event with other government entities. Any specialized training or speaker benefiting only FISD staff requires competitive procurement.

Conference Attendance. Employees attending conferences, seminars, workshops, or training sessions related to their job, where registration fees are required. If total annual conference fees to one organization exceed the threshold, administration should justify why that organization's conference is preferred.

This covers fees for publicly held events that FISD staff travel to attend. FISD doesn't currently spend over the threshold with any single conference organization. The key difference: staff travel to receive training rather than bringing consultants to FISD.

Newspaper Advertising. Advertising in local newspapers to communicate legally mandated information like elections and procurement opportunities, when paid directly to the publisher. *This includes advertising for RFP releases and elections.*

Subscriptions. Professional publications needed for job duties or educational requirements.

Examples include professional magazines, publications, or newsletters relevant to staff roles.

Field Trips. Student trips to specific locations or one-time events. *This applies to student trips only. Staff team-building events require competitive procurement.*

Student Venues. Facilities where location makes alternatives impractical due to proximity to school (such as swim facilities and golf courses). If annual venue costs exceed the threshold, competitive procurement is required.

Example: Paying green fees at a local golf course or swim access fees. Vendors providing student facility access over the threshold must go through competitive procurement.

Extracurricular Venues. Rental facilities chosen based on availability, schedule, or specific needs (like graduation venues with adequate seating). If annual costs exceed the threshold, administration should justify why no other facility works.

FISD has multiple venues available. Any request to add a vendor for facility rental requires Director of Purchasing approval.

Travel. Student and employee travel costs like airfare, rental cars, lodging, and meals that can't be competitively bid due to specific locations or dates. Travel that can be competitively bid (like charter buses) should be, unless unavailable.

Journey House is FISD's contracted travel booking service. The Purchasing department has a travel desk to ensure compliance with travel rules. Any travel expenses not booked through Journey House require Purchasing review and approval.

Sole Source. Sole source purchases are non-competitive procurements allowing a single supplier to provide products or services to FISD, exempt from competitive procurement requirements under TEC 44.031. *(See Sole Source Purchase Approvals section below).*

TEA defines a sole source as a vendor providing:

- An item restricted by patent, copyright, secret process, or monopoly
- A film or manuscript
- Utility services
- Captive replacement parts for equipment

While patents or copyrights are factors, the primary consideration is whether there are no other products or services serving the same purpose available. Some vendors—especially those offering software, subscriptions, and professional development—claim sole source status, often because they tailor their products to FISD. However, this does not automatically qualify them as sole source under the legal definition. Purchasing regularly reviews sole source vendors to a make sure the vendor is still a sole source and encourages vendors to register in Ion Wave for RFP opportunities they should respond to if they wish to continue having FISD as a customer.

Sole Source Procedure and Approvals. FISD adheres to EDGAR guidelines for sole source

purchases. Sole source justifications include:

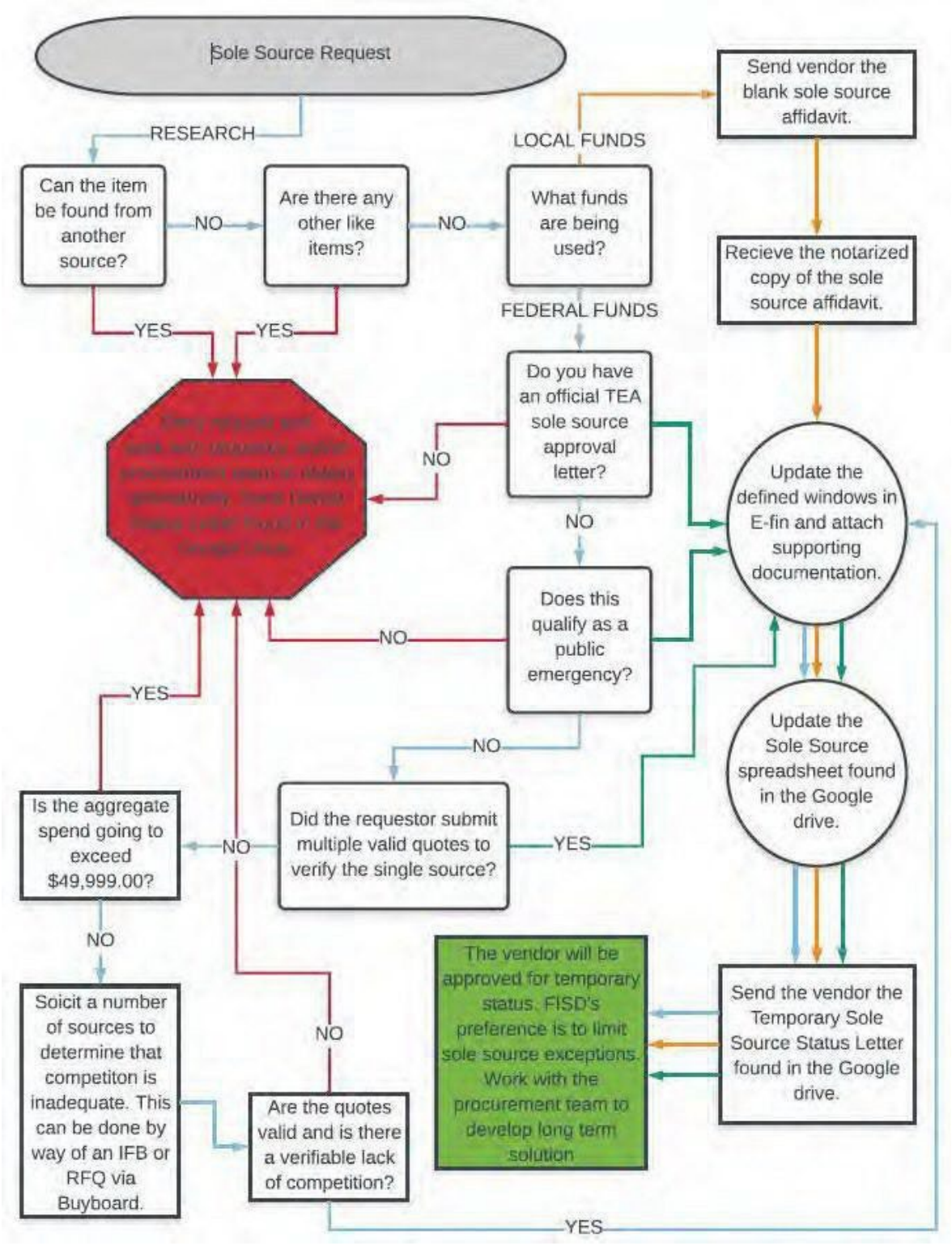
1. Items protected by patent or copyright.
2. Films or manuscripts or theatrical royalties
3. Utility services.
4. Captive replacement parts.

Sole source exceptions are limited, and alternatives should be sought for vendors claiming sole source status. For federal funds, affidavits are not accepted.

Approvals. For sole source vendor requests:

1. Buyers receive requests for purchases from vendors claiming sole source status.
2. Verify if the vendor is registered in E-Fin. If not, follow TEC §44.031 requirements.
3. Collaborate with the Vendor Team for vetting.
4. The Vendor Team checks for alternative procurement methods.
5. If necessary, conduct informal bidding through Buyboard or IonWave.
6. Document findings in a purchase justification, which must accompany requisitions.
7. Track sole source vendors and update records accordingly.
8. Send template response emails on official FISD letterhead to notify vendors of their status and guide them on registering in IonWave.

FIGURE 2: Sole Source Approval Workflow



Interlocal Agreements. An interlocal agreement is formed when one local government contracts with another to provide goods and/or services. We execute interlocal agreements for the purchase of goods and services directly from government units, as in when we buy services and software from Regional Service Centers, but we also sign interlocal agreements to participate in purchasing cooperatives. including the Educational Purchasing Cooperative of North Texas and the Central Texas Purchasing Authority. These agreements allow for shared contracts, enabling FISD to utilize bids awarded to other ISDs. For a complete list of ISDs whose contracts FISD can use, please contact robersonj@friscoisd.org.

FISD participates in the following cooperative programs:

TABLE 4: Purchasing Cooperatives	
Cooperatives	Websites
1GPA	www.1gpa.org/
BuyBoard	www.buyboard.com
CCGPF (Collin County)	www.collincountytx.gov/purchasing/
Central Texas Purchasing Alliance	www.txctpa.org
Choice Partners / HCDE	www.choicepartners.org
DIR	www.dir.texas.gov
Educational & Instructional	www.eandi.org
Education Service Centers	www.esc3.net
Region 3	www.tips-usa.com
Region 8 (TIPS)	www.region10.org
Region 10 (MRPC)	www.esc11.net
Region 11	www.esc12.net
Region 12	www.esc19.net
Region 19 (Allied State)	https://programs.esc20.net
Region 20 (PACE)	www.epcnt.com
EPCNT	www.gsaelibrary.gsa.gov
General Services Commission (GSA)	www.hgacbuy.org
HGAC	www.ncpa.us/Vendors
NCPA	www.sourcewell-mn.gov
NJPA/Sourcewell	www.nppgov.com
NPPGov	www.omniapartners.com
Omnia / NIPA / TCPN / US Communities	www.ncpa.us/Vendors
Purchasing Cooperative of America	www.tarrantcounty.com
Tarrant County PC	www.tasb.org
TASB	www.tfc.state.tx.us
Texas Facilities Commission	www.comptroller.texas.gov
Texas Procurement & Support Services	www.txsmartbuycom
TX Smartbuy	

Competition in Cooperative Purchases. Purchases through an EDGAR-compliant cooperative generally meet competitive bidding laws. However, quotes are required according to TABLE 1. FISD staff will additional quotes them in certain cases, such as:

- Purchases of $100,000 or more
- New products or services not previously used by FISD
- Critical, high-priority projects
- To meet guarantor requirement.

Professional Services. Professional services, defined in TEC and TGC, are not evaluated solely on price but on the quality of service provided. While there is no formal definition, TEC §44.031 and TGC Chapters 2254 and 2269 specify certain services considered professional. Professions include, but aren't limited to: Certified public accountants, fiscal agents, financial consultants, and technology consultants, attorneys, real estate appraisers, nursing and medical professionals, landscaping architects, architects, engineers, land surveyors, and construction material engineers, testers, and inspectors.

FISD Solicitations

Purchasing coordinates competitive bidding and vendor selection for campuses and administrative offices, managing the entire process for District solicitations. The exceptions to this are FF&E and construction projects, which are handled by other departments and their partner organizations. This solicitation process, termed an FISD bid (*see* **Attachment 1**), includes:

- Intake of purchase requests.
- Evaluating the need for informal or formal procurement based on state and federal laws.
- Collaborating with subject matter experts to develop statements of work.
- Scheduling the solicitation timeline.
- Assisting in preparation of bid documents and specifications.
- Distributing requests for bids to interested vendors.
- Receiving and assessing vendor submissions for responsiveness.
- Analyzing bid documents and preparing qualification recommendations for School Board approval.

Upon qualification, qualified vendors are notified, and District purchase orders are processed.

Proposal Submission. Proposals are preferably submitted online via Ion Wave, a bidding management system. Alternatives include postal service or in-person delivery before the bid closing date. Buyers must monitor mail to include hard copy bids in the RFP process.

Intake and Evaluation of Purchase Methods.

1. Buyers assist FISD staff with procurement-related inquiries.

2. The Buyer identifies:
    - Anticipated purchase value.
    - Availability of current vendors for similar goods/services.
    - Possibility of using an EDGAR-compliant purchasing cooperative.
    - Whether the product is available from a sole source, following appropriate procedures if so.

3. Buyers evaluate intake information to determine the required procurement method.

Developing Solicitation Documents and Schedules.

4. The Buyer creates a bidding schedule and determines the date for Board approval.

5. Using the FISD Bid Work Plan, the Buyer collects necessary information for new bids to

include:

- Required services and products.
- Technology support.
- Scope limitations.
- Confidential data handling.
- Delivery and invoicing requirements.
- Certification/licensing needs.

The Buyer and staff collaborate to establish evaluation criteria and identify necessary criteria for responsive bids. They also select a minimum of three evaluators and their alternates.

Confidentiality and Guidelines. All participants in the bidding process sign an FISD Non-Disclosure Agreement (NDA) before any documents are released. Signed NDAs are stored in Smart Sheets until bids close after which they are moved to Ion Wave. Evaluators receive FISD Evaluator Guidelines, which must also be signed and returned before the release of vendor bids. These documents follow the same storage protocol as the NDAs

Bid Preparation and Evaluation Process.

6. After receiving the *NDA and Evaluator Guidelines,* the Buyer adds new evaluator documents to the google drive.

7. The Buyer gathers potential bidder information from campus and department staff, including email addresses for contacting vendors about registering in Ion Wave's supplier portal.

8. The Buyer emails the timeline to staff, including deadlines for:
    - Bid posting
    - Bid acceptance
    - Submission for review
    - Evaluation return dates
9. The Buyer drafts the bid opportunity in Ion Wave, ensuring compliance with template standards, including required items like a conflict of interest questionnaire. The Buyer decides on:
    - Rolling evaluation periods
    - Auto-renewal options
    - Multiple Service Award (MSA) or Catalog bids, notifying the Director as needed for memo justification.
10. A draft bid is sent to campus or department staff for review and written approval before issuance. This can also be done through a meeting, followed by an email confirmation.

11. All communication regarding open solicitations must go through Purchasing; staff should not discuss these with potential vendors.

Distribution of Bids and Legal Notices.

12. Open RFPs, CSPs, and RFQs are distributed to registered vendors in Ion Wave when released.

13. For bids under Education Code 44.031, a legal notice must be emailed to *Star Community Newspapers* (jcraghead@starlocalmedia.com), with a copy sent to the Director of Purchasing and the Business Office Secretary. Attach the confirmation to the bid in Smart Sheets until the bid closes.

14. The legal notice must include bid specifications, requirements, closing date, and submission instructions. It will run for two consecutive weeks.

15. A help desk ticket is submitted to add the bid opportunity to the FISD Procurement web pages.

16. Vendors can modify their submissions via Ion Wave before the closing date, but changes are restricted after closure until awards are issued.

Bidding Process.

17. Suppliers must register on Ion Wave to submit bids electronically.

18. All inquiries regarding open solicitations should go through the Purchasing department, not directly to vendors.

19. The Buyer provides limited technical assistance and may hold a pre-bid conference, coordinating the agenda with FISD staff.

20. The Buyer collects questions from bidders and shares answers via Ion Wave.

21. During the bid opening:
    - Responses are reviewed for compliance with terms and completeness.
    - The Buyer communicates with bidders about any missing attachments.
    - The evaluation template is initiated, and preliminary information is added to the Board agenda.

22. The Buyer ensures all submissions, both electronic and hard copy, are managed properly.

23. Ion Wave prevents late submissions after the closing date. A help desk ticket is submitted to remove the bid from the Procurement web page post-closure.

Evaluation.

24. Upon closing, the Buyer conducts a final review of vendor bids to ensure responsiveness:
    - Alignment with the scope of work
    - Completeness of responses
    - Inclusion of necessary documentation

25. The Buyer finalizes the download of documents from Ion Wave and uploads materials to the Google Drive to share.

26. The evaluation template is completed with scoring criteria, points to be awarded and names of entities to be evaluated.

27. The Buyer schedules a TEAMS call with new evaluators to confirm they've signed the NDA and Evaluator Guidelines, review scoring instructions, address additional scoring questions, and answer any evaluator inquiries. The meeting is optional for end users familiar with the current evaluation process and template when Buyer has no bid-specific information to share.

28. The Buyer emails vendor bids, including all review documents, the scoring template, and the "How to Score Responses" tip sheet to evaluators using the standard email template. The email includes:
    - Deadline for returning evaluations
    - Link to vendor responses downloaded from Ion Wave
    - Planned Board meeting date for vendor qualification
    - Instruction for evaluators to contact the Buyer if they cannot complete the review before the deadline
29. The Buyer notifies evaluation alternates of their status in case an evaluator cannot complete the review.
30. Purchasing will attempt to initiate evaluations with identified evaluators twice. If evaluators remain non-responsive, their reviews will not be submitted to the Board.

31. Evaluations typically involve multiple teams. Only evaluations completed by responsive evaluators will go to the Board.

32. The Purchasing Director will inform the evaluator and their appointing individual of any failure to engage in the evaluation process, with the CFO copied on the email.

33. The Buyer monitors evaluator progress, addresses questions, and compiles score sheets in the evaluation template as they are received.

34. The Buyer is responsible for sending clarification requests to vendors during the evaluation period.

35. Once scores are totaled, the Buyer shares them with the evaluation committee and relevant staff. Purchasing analyzes the scores and collaborates with campus and department staff on reference checks for high-scoring vendors, if necessary.

36. The Buyer asks if evaluators or project managers wish to schedule finalist interviews or presentations. If so, he or she will:
    - Collaborate on the number of finalists to invite
    - Determine interview/presentation format and length
    - Identify possible dates and locations, reserving rooms as needed
    - Decide which FISD staff should attend
    - Develop a scoring rubric with input from evaluators

37. The Buyer will also:

- Combine finalist presentation scores with proposal scores
- Send NDAs and evaluator guidelines to any additional staff scoring presentations: new evaluators sign an NDA before participating
- Attach signed NDAs and other documents to RFP Smart Sheets "card" until bid closes.
- Collect scoring rubrics from evaluators and attach them to the bid in Ion Wave, compiling scores from finalist presentations and proposals
- Notify staff of the vendors proposed for Board recommendation.
- Moves all documentation from Smart Sheets to IonWave when the RFP closes (to include legal notice of advertisement from Star Local Media).

Best and Final Offers. The Buyer may request best and final offers or clarifications from bidders after finalists' interviews.

Qualification Recommendation. Preliminary Award. Frisco administration may preliminarily qualify a vendor pending successful contract negotiations. The selected vendor receives an email notification regarding the intent to negotiate.

Negotiation. Purchasing facilitates negotiations with the highest scoring vendor. If negotiations fail, the Buyer will notify the highest vendor and start discussions with the next highest scorer, continuing down the list until a decision is made or the bid is canceled.

Board Agenda Preparation. The Buyer updates the Board agenda on the Procurement I drive, creating a bid folder that includes the evaluation and Board Agenda Action Sheet.

Board Action Sheet Contents:

- Recommended vendors list
- Spending estimates (if applicable)
- Staff member representation
- Board meeting date
- Background information
- Qualification
- Term dates

Agenda Submission. The Assistant to the Superintendent places the agenda item on the School Board's agenda, providing support materials for review.

Board Approval. The Board reviews and approves all bids/proposals, as recorded in the minutes.

Vendor Notification. The Buyer informs awarded vendors via a qualification notification in IonWave.

Post-Qualification Process. Award Notification. The day after the Board qualifies vendors, the Buyer logs into IonWave to finalize the qualification, notifying vendors of their status.

Form 1295 Request. If needed, the Buyer requests Form 1295 from the vendor, if needed. Review the 1295 requirements on the Texas Ethics Commission website to determine whether the vendor needs to submit a 1295. Instructions for filing a 1295 are on the website.

Vendor Team Notification. The Buyer emails the Vendor Team Senior Buyer with details about the qualified vendor, including the vendor name, number, awarded bids, and term dates.

Priority Processing. For priority vendors, the Buyer will seek approval from the Senior Buyer for expedited processing.

Qualification Extensions. Extension Terms. Vendor qualifications are typically one year, with optional extensions. If a contract does not meet district needs, the bidding process may be initiated at any time.

Tracking Extensions. The Buyer tracks bid +extensions and expirations using the FISD Bid Calendar in Smart Sheets and a monthly Cognos report.

Extension Correspondence. When a contract is up for extension, the Buyer contacts the relevant department to assess whether to extend, update, or cancel the contract.

Contract Manager Notification. Purchasing will notify the contract manager about the upcoming renewal and inquire if the bid continues to meet their needs.

Contract Extension Process.

A. The contract manager or end user department must verify specifications and report any issues to the awarded vendor(s) before extension.

B. Extensions will only be issued to previously awarded vendor(s) with satisfactory performance. Completion documentation will be sent to the requesting department upon request.

C. Extension information will be added to the Board Agenda under “Information Items.”

D. If the District opts not to extend a qualification, the Buyer will email the vendor using the "non-renewal template" from the Purchasing Google Drive.

Post-Board Meeting.

38. The Buyer will email the Vendor Team to request updates in E-Finance, including address, phone, contact, PO email, A/R email, and contract expiration date. The extension will be "awarded" in Ion Wave.

Multiple Award Requests for Proposals (RFPs). FISD utilizes multiple qualification RFPs to purchase supplies and services for students and staff. These solicitations allow multiple vendors to be awarded contracts for similar products or services, such as catering. FISD ensures that MSA bids meet minimum competitive requirements. Purchases from MSA RFPs must meet FISD quote requirements.

Justification for Multiple Awards. The Director of Purchasing must create a memo explaining the need for multiple awards, stating that historical purchasing patterns are unpredictable. This memo confirms that multiple awards are necessary and appropriate.

Annual Review of Multiple Award Contracts. The Director of Purchasing conducts an annual review of contracts awarded through multiple qualification RFPs, including:

- Total expenditures for awarded vendors.
- Confirmation that conditions justifying multiple awards still exist.
- Evaluation of whether a single qualification may provide better value for FISD.

Examples of Multiple Award Procurements. Multiple qualification RFPs may be appropriate for:

- Administrative and instructional contracted services
- Professional development providers
- Catering and charter bus services
- Special event services (e.g., DJ services)
- School photography
- Specialty printing services

Catalog or Discount-From-List Procurements. These RFPs are used when multiple vendors offer similar goods, but specific needs may require different vendors. Examples include:

- Classroom instructional materials
- Fine arts supplies
- Health and vocational equipment

Protesting a Solicitation. Protest Information. Applicants receive information about protesting solicitations as part of the standard bid template. Protests must be submitted in writing to the responsible Buyer.

Forwarding Protests. The Buyer forwards protests to the Purchasing Director. For Child Nutrition bids, protests are sent to the Director of Child Nutrition, who will notify TDA.

Resolution Process. If the protest is valid or unresolved, it is forwarded to the CFO for further action.

Protesting a Qualification. Initial Review. The Purchasing Director meets with the protesting vendor to discuss the qualification details.

Formal Protest. If unresolved, the vendor may submit a formal protest within five business days of the public notice of qualification.

Notification Process. The written protest is sent to the responsible Buyer, who emails it to the relevant FISD staff based on the award value:

- Level 1: Up to $499,999 – Purchasing Director
- Level 2: Above $499,999 – CFO and Purchasing Director

Protest Contents. The protest must specify:

- Relevant statutory or regulatory provisions
- Description of alleged violations
- Relevant facts
- Issues to be resolved

- Supporting arguments

Procurement Delay. FISD will temporarily pause the procurement unless the CFO determines that proceeding is necessary.

Response Timeline. FISD will respond to the protest within 10 business days.

Appeal Process. The vendor may appeal the decision within five business days by sending a written appeal to the FISD CFO and General Counsel.

Final Decision. FISD will inform the vendor of the decision. Appeals are not permitted.

Vendor Risk Assessment & Contract Monitoring

Purchasing completes a risk assessment for purchases presenting elevated exposure to the District: contracts exceeding $1 million, purchases involving student data, and purchases that connect to District technology systems. Most purchases are not affected. Purchases that meet these criteria receive a closer review before a contract is signed, so that issues are identified early enough to protect large-dollar investments, student privacy, and District data.

The assessment determines the level of procurement support a purchase receives and what monitoring occurs after the contract is in place. The assessment is an internal Purchasing determination. It is not a part of bid scoring. Vendors are not scored or compared based on risk. Only the vendor a department intends to qualify is assessed.

Assessment Triggers. A purchase is referred for risk assessment when any of the following apply:

- Anticipated spend of more than $1 million over the term of the contract.
- The vendor will have access to student or staff confidential information.
- The goods or services connect to or integrate with District technology systems, including new technology or artificial intelligence (AI) functionality.
- The Director of Purchasing, an administrator, or the Deputy Superintendent designates the purchase for review.

The student data and technology integration triggers apply regardless of dollar amount. A purchase meeting either trigger is assessed even when annual spend is below the competitive bidding threshold.

End User Responsibilities. Before making a purchase, staff work through the End-User Purchasing Decision Tree (**Attachment 2**), which asks four questions:

1. How much will be spent over the life of the contract? Under $50,000 requires quotes. Between $50,000 and $100,000 requires quotes and a Best Value Justification. At $100,000 or more, the purchase must use a formal competitive method and be approved by the Board. Over $1 million is sent to Purchasing.
2. Is this a new vendor for FISD? If yes, submit a Purchasing help desk ticket in Laserfiche and hold the purchase until Purchasing determines the purchase method, then return to question three.
3. Will the vendor see student data or connect to District systems? If yes, the purchase receives a risk assessment.

4. Has the purchase been unchanged for the past two or more years? If nothing new has been added, meaning no new process, no new technology or AI, and the same use of data, no ticket is needed and the end user proceeds using the Business Services Operating Guide procedures.

Help Desk Tickets. Staff should submit a Purchasing Help Desk ticket in Laserfiche when:

- Frisco ISD will spend more than $1M over the term of the contract.
- The vendor is new to FISD.
- The purchase introduces a new process, new technology, or artificial intelligence (AI).
- The arrangement has been in place for less than two years.

The ticket should indicate whether the vendor will need access to student and/or staff information or District technology. Tickets for large, sensitive, or unusual purchases should be submitted early in the planning process. When required information is not identified early, the requisition or contract may be delayed or returned for correction.

Staff who are unsure whether the process applies should submit a ticket. Purchasing will review the request with them and determine the appropriate next steps.

Purchasing Review Process.

1. Information review. Purchasing reviews vendor information during the bid and contract process.
2. Risk flag. A vendor using/integrating student data, PII, or District technology is flagged for added review. A flag is administrative and is used for follow-up only; it is not a score.
3. Main review. The full assessment is normally completed when the contract is submitted for approval. The contract approval queue is the primary point of capture, and the requisition queue serves as the backup for cooperative, interlocal, and other purchases that bypass front-end screening.
4. Scoring. The Contract and Procurement Systems Specialist scores the vendor using the Risk Scoring Worksheet (**Attachment 2**) and assigns a rating of Low, Medium, or High.
5. Escalation. The Specialist presents High-rated vendors to the Director of Purchasing, who determines whether to proceed and how the rating is communicated.

Turnaround. Assessments are completed within two-day business days, usually.

Confidentiality. Risk ratings are internal working determinations. They are not provided to evaluation committees, are not shared with responding vendors, and are not used as an evaluation criterion.

Risk Ratings and Level of Procurement Support.

- Low. The end user makes the purchase following the Operating Guide.
- Medium. Purchasing handles the purchase. Purchasing sends a written quote request, helps the department build an evaluation tool, brings in District subject matter experts to evaluate, checks references and public records, documents findings as the process goes, and assists with contract negotiation.
- High. Purchasing issues a full, formal procurement, using an RFP, RFQ, or competitive sealed bid.

Enhanced Reference Checks. For high-rated vendors, Purchasing completes a written

reference form, follow-up telephone reference calls, and reviews of Better Business Bureau or other publicly available reputation information. The phone log is completed in real time, so responses are recorded consistently across buyers, and any discrepancy between written and verbal feedback is documented.

Board of Trustees Approval. Entities applying to Frisco ISD extended open or other catalog solicitations are presented to the Board for qualification; whereas vendors on competitive solicitations are awarded and presented to the Board.

High and Medium risk scores are communicated to the Executive Director of Business Services and the Deputy Superintendent before a vendor is recommended to the Board. This is in addition to the CH(LOCAL) requirement that contracts of $100,000 or more be approved by the Board.

A vendor may first be qualified/awarded and deemed LU (low risk, unused), then later be issued a contract and at that point go to the Board as medium or high risk.

Contract Monitoring. Vendors rated Medium or High enter contract monitoring after award. Monitoring activities are selected from the Monitoring Activity Matrix, which organizes activities under the District's established review types. The matrix is a menu rather than a required set; the Contract and Procurement Systems Specialist selects the activities that fit the contract.

- Medium risk. At least one monitoring check each year.
- High risk. At least two different monitoring checks each year. High-risk contracts are re-scored annually.

Federal and Grant Funding. Purchases funded in whole or in part by federal awards or grants carry a Medium monitoring floor and the applicable 2 CFR 200 compliance activities regardless of the assigned tier. Federal funding is not by itself a High-risk trigger.

Records. Documentation for high-risk vendors is maintained in a standard folder structure covering procurement, contract, risk assessment, Board documents, monitoring, performance, financial, technology and data protection agreements, renewals, and closeout.

Repeat Purchases and Reassessment. A completed assessment is recorded with the vendor's tier, the assessment date, and the assessed category. A repeat purchase from the same vendor does not require re-screening when the purchase falls within the same assessed category, the assessment remains current, and there is no indication of new technology, AI functionality, or a change in how data is handled. A recorded tier does not carry over to a purchase outside the assessed category.

A vendor is re-scored before award when there is a change in purchase method or a change of term, pricing structure, or scope. Requisition reviewers refer any purchase meeting a trigger to the Contract and Procurement Systems Specialist, including cooperative and interlocal purchases that did not go through the front-end screening process.

Travel

Purchasing's Travel Desk manages travel for staff on school business. Staff should use the travel desk tile in Laserfiche for flight, hotel, conference registration, and car rentals. (*see FISD staff portal*).

Once a request is received, the Travel Specialist will finalize arrangements and send the requestor

confirmation(s) and purchase orders. Approved employee travel expenses are reimbursed upon return only. **Attachment 3** outlines documents end users need for reimbursements. Purchasing's *Travel Work Vivo* page is a comprehensive guide to District travel.

Internal Controls

FISD uses requisitions, (REQs), change orders (CO), and purchase orders (POs) to ensure all purchases align with district needs, budget, and compliance requirements.

Requisitions. Use **Attachment 4** for standard requisition review (checklist). A purchase requisition notifies Purchasing that goods and/or services have been requested through eFin.

Requisition Processing Procedure.

1. The requestor at the campus or department enters a requisition. Guidelines and training are provided by Compliance.

2. Approval Workflow:
    - Requisitions are routed to the principal or department head in eFin for review.
    - They follow a specified approval workflow, including compliance checks for technology, furniture, or federal grants.
3. Finance reviews requisitions for budget and account code accuracy before forwarding to Purchasing. Incorrect items are returned for correction.
4. Purchasing Approval:

    A. The Buyer logs into eFin, selects "L—Approved at Lower Level," and checks the "required" box to view the requisition queue.
    B. The Buyer opens the requisition to verify purchase order type and requested goods/services.

Alternative Payments (Alt Pays). Alt Pays are issued when an end user needs a check before an event or if the purchase does not need to be received in eFin (intangible goods). Examples: Field trips (initial deposits), refunds, employee reimbursements, memberships

Approving Alt Pays.

1. Log into eFinance. Navigate to **Purchasing > Requisition Processing > Approve/Deny Requisitions.

2. Select Approval Criteria. Choose 'L-Approve at Lower Level' and input "2*" in the Approval Group box.

3. Review Alt Pay requisitions using the checklist in **Attachment 5**.

4. Approval Actions. Click "Approve" if the alt pay information is correct to finalize. If corrections are needed, use the "Needs Correction" button to provide brief notes. Use the standard needs correction emails to return alt pays.

5. Print Purchase Orders. Navigate to **Purchasing > Purchase Order Processing > Purchase Orders**, select "Complete" status, and print.

Not-to-Exceed Requisitions. NTE requisitions are one-time orders for goods/services not exceeding a specified amount, usually $500 or less. The requisition must include "NTE" in the comments.

Requisitions for Blanket POs. BPOs are ongoing purchase orders with a fixed amount for the same vendor, typically for contracted services at a set hourly rate. Change orders cannot be requested for BPOs. If the requisition is for a campus BPO, approval from the Purchasing Director is needed. For department requests, ensure appropriateness for a BPO. If the request is not reasonable, deny it.

Corrections and Cancellations: Standard and Alt Pay Requisitions. Needs Correction. Always use the email templates to return requisitions to end users.

Emergency Requests. Needed for the safety and security of students, staff and facilities. Ask the end user to have his or her principal contact the Purchasing Director to expedite requisitions. Notify Accounts Payable for special processing if a check is needed outside normal schedules.

Cancellation. To cancel an approved PO, email Accounts Payable with the PO number and reason. For ones unapproved deny the approval.

Purchase Orders. Purchase order review is a second review of the information and details reviewed by the Requisitions Team.

1. Log into eFinance. Navigate to **Purchasing > Purchase Order Processing > Approve/Deny Purchase Orders.

2. Select Approval Criteria. Choose ‘L-Approve at Lower Level’.

3. Review Purchase Orders using the checklist in **Attachment 4.**

4. Approval Actions. Click “Approve” if the purchase order information is correct to finalize. If a purchase order does not meet approval criteria, select “Deny,” and enter the reason for denial in the dialog box. The Purchase Order is denied, and a notification is sent to the user.

5. Print Purchase Orders.
    a. Alt. Pays will be printed first - Navigate to **Purchasing > Purchase Order Processing > Purchase Orders**, input 2*” in the Approval Group field, select Complete status, search, and print. *Uncheck the box “email document to vendor.”
    b. Once Alt. Pays have printed, repeat the process to print traditional Purchase Orders. Navigate to **Purchasing > Purchase Order Processing > Purchase Orders**, select “search,” print purchase orders.

Change Orders. Change orders correct issued POs (quantity, dollar amount, or budget/account code changes). They cannot be processed for BPOs, except for specific departments. To approve a change order:

1. Log into eFinance and select “Approve/Deny Change Orders.”
2. Choose approval criteria and check “Required.” Click OK to view waiting change orders.

3. Open the change order and check the related PO for requested changes.
4. If it's a BPO from a non-exception department, deny the change and advise on submitting a new BPO.
5. Ensure the end users attach a brief explanation for the change. Contact the end user if it is not attached.
6. After review, click "Approve" and confirm changes. Print the change orders from the change order listing screen.

Change Order Printing Process. Print Change Orders. In the print dialog, uncheck "Email document to vendor" and click "OK". Respond to the pop-up boxes by clicking "Yes" and "OK" until prompted with "Did the change order print correctly?" Click "Yes".

Reprint Purchase Order.

- Navigate back twice in the menu.
- Select: **Purchasing > Entry & Processing > Purchase Order Processing > Purchase Orders**.
- Enter the purchase order number and click "Find".
- Click "Print Purchase Orders".
- In the print dialog, check "Reprint purchase orders", uncheck "Email document to vendor", and click "OK".
- Click "Yes" and "OK" through the pop-up prompts.

Credit and Store Cards

Credit Card. FISD does not have a p-card program. Campuses or departments may request to use the Business Services credit card, primarily for urgent purchases or when a vendor only accepts credit cards. Exceptions require approval from the Purchasing Director or CFO. A District credit card purchase form is available in Laserfiche.

Process for Credit Card Purchases.

1. Submit Request. The requesting department submits a District Credit Card Purchase Request.
2. Approval Workflow. The approval workflow includes requesting department → Purchasing Director → CFO assistant. Notifications go to Accounting, Purchasing, and CFO.
3. Purchasing verifies vendor status in eFinance, checking:
    - Current vendor status
    - Competitive purchasing guidelines
    - Aggregate expenditures, which must be under $100K.
4. Vendor Setup. If necessary, the Buyer directs the requestor to submit a new vendor packet to add the vendor to eFinance.
5. Decision. After review Purchasing approves or denies the request.
6. Final Approval. If approved the purchase is made by CFO's office.
7. Record Keeping. All transactions are recorded in Laserfiche and captured in the GL.

A non-compliant purchase approval form must be submitted for credit card purchases not following procedures.

Store Cards Management. Collection. The CFO's office manages annual store card collection and inventory.

Compliance Training. Compliance trains secretaries on proper card usage. Training is mandatory. Principals must also complete the training annually.

Distribution. Store cards are distributed based on needs.

TABLE 4: Store Card Distribution				
Organization	Kroger	Market Street	Hobby Lobby	Walmart
High School	2	1	1	1
Middle/Elementary	1	1	1	1
Department	1	1	1	1

New Vendor and Store Card Setup. Purchasing orders new vendor store cards and logs card numbers. New store cards follow the annual inventory process.

Lost or Stolen Store Cards. End users must report lost or stolen cards to the CFO's Office, which informs Purchasing to deactivate or replace cards.

Employee Departures. Principals are responsible for collecting all store cards when employees leave FISD.

Additional Store Cards Checkout. (Hobby Lobby, Kroger, United Supermarket)

- The CFO's Executive Assistant manages checkout of additional cards.
- Staff must have a copy of the PO when checking out a store card and return it within 24 hours.

Vendor Management in e-Fin

Vendor contract information is manually entered in e-Fin to expedite approval and document purchase method. When a new contract is awarded or a current one renewed, we must update several screens in eFinance.

Updating Contract Information (Screen 5000).

1. From the eFinance home page, staff clicks on **Vendor List** to access the Search Criteria screen.
2. Staff locates the vendor by entering the vendor number or searching by name or keyword in the **Vendor Name** or **Search Name** fields, using asterisks (*) around the search terms (e.g., *Costumes by Dusty*).
3. Staff selects the desired vendor (search results may include several) and clicks on **Defined Windows** at the top.
4. Staff highlights **5000 Contract Information** and clicks the green **OK** button at the top. Screen 5000 follows this format:

	CONTRACT INFORMATION		
CONTRACT #	FINE ARTS	END DATE	
CONTRACT #	RFP 628-2018-11-22	END DATE	11/12/2022
CONTRACT #	FINE ARTS CLINICIANS	END DATE	
CONTRACT #	RFP 662-2019-10-23	END DATE	10/7/2023
CONTRACT #		END DATE	
CONTRACT #		END DATE	
CONTRACT #		END DATE	
CONTRACT #		END DATE	
CONTRACT #		END DATE	
CONTRACT #		END DATE	
NOTES &	THEATRE SUPPLIES AND EQUIPMENT		
COMMENTS			

Screen 5000. Entering Contracts. You can enter or update up to five contracts per vendor. For each contract, fill in the following:

- Contract Name (1st field)
- Contract # (2nd field below Contract Name)

Notes & Comments. Use the NOTES & COMMENTS section for additional contract information.

Save Changes. Click the green OK button at the top to save.

Screens 5002 to 5006.

Return to Search. Click the red BACK button to return to the Search Criteria screen, then click Defined Windows to access contract details.

Select Contract. Highlight the relevant contract page (5002 to 5006) and click the green OK button.

Update Details. Enter or update the following information:

- Contract Name
- Contract #
- Expiration Date
- Discount (if applicable)
- Shipping (if applicable)
- Rep Name
- Interlocal (YES or NO)
- Rep Phone
- D&D Lookup (YES or NO) and its expiration date

- 1295 Compliance (if applicable) and its expiration date
- EDGAR Compliance (YES or NO) and its expiration date
- Rep Email

Save Changes. Click the green OK button to save each update.

Screens 5002 to 5006 follow the format below.

CONTRACT 1			
CONTRACT NAME	FINE ARTS	COMMODITY	
CONTRACT #	RFP 628-2018-11-22	EXP DATE	11/12/2022
DISCOUNT	10%	SHIPPING	QUOTE
REP NAME	KYMBERLY NIELSEN		
INTERLOCAL	YES		
REP PHONE	817-548-5767		
D&D LOOKUP	YES	EXP DATE	8/11/2022
1295		EXP DATE	
EDGAR	YES	EXP DATE	11/22/2022
BUYER	BARNES		
REP EMAIL	COSTUMES@COSTUMESBYDUSTY.COM		
COMMENTS			

Procedure to Update PO Email. From the Search Criteria screen, click the **EFT/ACH** tab.

1. Click the green **OK** button and enter the updated PO Email.
2. Click the green **OK** button to save the information.

Removing a Vendor from BIDDING Hold. To remove a vendor from BIDDING hold after entering or updating contract information:

1. From the Search Criteria screen, click the **General** tab.
2. Click the green **OK** button and delete “BIDDING” from **Status 1**.
3. Click the green **OK** button to save the changes.

Locating Contract Information for FISD RFPs, CSPs, and RFQs.

1. Access FISD’s bidding system, *Ion Wave.*
2. Click **Bids** at the top of the screen.
3. Enter the first three digits of the bid number in the **Bid Number** box and hit enter.
4. Click on the relevant RFP, CSP, or RFQ number.
5. The **Award Details** tab shows awarded vendors.
6. Verify the awarded vendor and click the **Documents** tab for bid specifics.
7. Download the **Bid Invitation** to view contract details, including qualification date and renewal information.

8. Check the **Supplier Response** for vendor contact and discount information, as well as the PO email address.
9. Under **Supplier Response Attachments**, verify the EDGAR and 1295 documents are signed and dated (if applicable).

Locating Contract Information for FISD Written Quote Requests.

- Use the requested quote to gather information for screens 5000, 5002, and the PO Email.
- Attach the original quote document, awarded supplier response documents, and justification for vendor selection in eFinance:
    - Save files on your computer.
    - Click the paperclip icon on the Search Criteria screen.
    - Browse and attach the documents, naming each file before saving.

Locating Contract Information for Sole Source.

1. Ensure the sole source vendor has a current signed and notarized Sole Source Affidavit attached the vendor file in eFinance:
2. Save the sole source file on your computer.
3. Click the paperclip icon and attach the document.
4. Enter the expiration date in screens 5000 and 5002 (sole source agreements
5. expire one year from update).

Locating Contract Information for RFPs from Other Districts.

- Contact the ISD for:
    - RFP / Contract (includes details like qualification date and expiration).
    - Supplier Response (provides contact info, discounts, and PO email).
    - Vendor Price Sheet, EDGAR, 1295 (if applicable), Interlocal Agreement.
- Attach the documents in eFinance:
- Save files on your computer.
- Click the paperclip icon and attach each document.

TABLE 5: ISDs Frequently Sharing Contracts

District Contacts	ISD website
Allen ISD	www.allenisd.org
Austin ISD	www.allenisd.org
Carrollton-Farmers Branch ISD	www.cfbpurchasing.com
Dallas ISD	www.dallasisd.org
Denton ISD	www.dentonisd.org
Eagle Mountain- Saginaw	www.emsisd.com
Fort Worth ISD	www.fortworthisd.org
Garland ISD	www.garlandisd.net
Grand Prairie ISD	www.gpisd.org
Grapevine / Colleyville ISD	www.gcisd.net
Irving ISD	www.irvingisd.net
Joshua ISD	www.joshuaisd.org
Keller ISD	www.kellerisd.net
Lewisville ISD	www.lisd.net
Little Elm	www.littleelmisd.net
Mansfield ISD	www.mansfieldisd.org

McKinney ISD	www.mckinneyisd.net
Plano ISD	www.pisd.edu
Richardson ISD	www.risd.org
Sherman ISD	www.shermanisd.net
Lewisville ISD	www.lisd.net
Little Elm	www.littleelmisd.net
Mansfield ISD	www.mansfieldisd.org
McKinney ISD	www.mckinneyisd.net
Plano ISD	www.pisd.edu
Richardson ISD	www.risd.org
Sherman ISD	www.shermanisd.net
Weatherford ISD	www.weatherfordisd.com

Locating Contract Purchasing Cooperative RFP Information.

1. Access the Cooperative's Website. Log in to the purchasing cooperative's website to find vendor and contract information (registration may be required).
2. Save Required Documents. Save the following documents to your local computer:
   - RFP/Contract. Includes the contract name, qualification date, extension schedule, expiration date, and renewal terms.
   - Supplier Response. Contains vendor contact details, discount information (if applicable), and the PO email address for eFinance.
   - Vendor Price Sheet
   - EDGAR Document
   - Form 1295 (if applicable)
   - Interlocal Agreement
3. Upload Documents to eFinance.
   - Click the paperclip icon on the Search Criteria screen.
   - Browse for and attach each document.
   - Name the document and hit enter to save.
   - Repeat for each document needed.

TABLE 6: Frisco ISD Cooperative Memberships	
Cooperatives	Websites
1GPA	www.1gpa.org/
BuyBoard	www.buyboard.com
CCGPF (Collin County)	www.collincountytx.gov/purchasing/
Central Texas Purchasing Alliance	www.txctpa.org
Choice Partners / HCDE	www.choicepartners.org
DIR	www.dir.texas.gov
Educational & Instructional	www.eandi.org
Education Service Centers	www.esc3.net
Region 3	www.tips-usa.com
Region 8 (TIPS)	www.region10.org
Region 10 (MRPC)	www.esc11.net
Region 11	www.esc12.net
Region 12	www.esc19.net
Region 19 (Allied State)	https://programs.esc20.net
Region 20 (PACE)	www.epcnt.com

EPCNT	www.gsaelibrary.gsa.gov
General Services Commission (GSA)	www.hgacbuy.org
HGAC	www.ncpa.us/Vendors
NCPA	www.sourcewell-mn.gov
NJPA/Sourcewell	www.nppgov.com
NPPGov	www.omniapartners.com
Omnia / NIPA / TCPN / US Communities	www.ncpa.us/Vendors
Purchasing Cooperative of America	www.tarrantcounty.com
Tarrant County PC	www.tasb.org
TASB	www.tfc.state.tx.us
Texas Facilities Commission	www.comptroller.texas.gov
Texas Procurement & Support Services	www.txsmartbuycom
TX Smartbuy	

Divestment Look-up Procedure

The Texas Comptroller provides divestment lists under TGC 808.051, TGC 2252.153, and TGC 2270.0209 for compliance with contracting requirements. Public procurement professionals must verify that new vendors are not on these lists before completing purchases and regularly check existing vendors.

New Vendor Verification. After setting up a new vendor in eFinance, staff visits the *Comptroller's divestment lists* to verify the vendor's status.

1. If the vendor is not listed, enter "YES" in the D&D Lookup field on screens 5002-5006 and sets an expiration date one year from the verification date.
2. If the vendor is on a divestment list, inform them they are ineligible to sell to FISD and places their eFinance vendor file on “BIDDING” hold.

Existing Vendor Verification. *Throughout the year, vendors on the divestment list are reviewed. A vendor on the divestment list is placed on “BIDDING” hold, is not available to use, and the divestment expiration date is updated as checks are completed.*

ATTACHMENT 1: FRISCO ISD BID PLAN

Frisco ISD Purchasing Bid Plan

Purchasing Solicitation Calendar of Events	
Event	Date
Planning Meeting	
Drafting Solicitation	
Department Review & Approval of Solicitation	
Legal Notices Due Date	
Solicitation Issued	
Date Responder Questions Due	
Date Answers are Due	
RFP Responses Checked-in by Purchasing	
Evaluation Meeting/Kickoff	
Evaluations Due to Purchasing	
Vendor Selection, Negotiation & Interviews, if necessary	
Prep Board Agenda Items	
Board of Trustees Qualification	
Planned Vendor set up in e-Finance (add one week)	

Needs Assessment & Budget

#1. Describe the education, business, or research need for this solicitation (background information for the RFP).

#2. What is your estimated budget? (Last FY's expenditures on like goods/services last year)

#3. Do you know of more than one vendor that can provide the products or services to meet your needs? (List names) (For example, Sylvan provides SAT prep, but so does Kaplan, Huntington, etc.)

#4. Is the solicitation (RFP, RFQ, CSP, etc.) required by federal or state regulations or laws? By local policy & procedure? (EX: over $100K annual spend or Child Nutrition purchase).

Stakeholders
What other departments or campuses should be included in the project planning?
#1
#2
#3
#4
Does this affect facilities? Have you contacted Construction, Maintenance or Risk Management about their role in the project?

Scope of Work

The SOW defines services AND/OR the products needed. It includes your schedule for the services and where the services will be provided. Payment terms and conditions are in the SOW, as well as quality and quantity standards you expect.

#1. Can you summarize what deliverables will be provided? (deliverable = goods or services provided the awarded entity. It can be tangible or intangible)

Possible Products to Include	
Product Name(s)	Product Name(s)

#2. Do you want samples of products provided? If yes, indicate requirements for samples and the delivery address.

#3. Is this for equipment? If yes, standard hourly price for maintenance not covered under warranty, including service call cost will be requested. A catalog price list will be requested

for possible parts needed for equipment repair.

#4. Is the product (or service) is a customized item or standard item “bought off the shelf”?

#5. Will the product or service require warranty? What is the standard minimum warranty required? All manufacturers must provide documentation of their warranty for CN to keep in their files.

#6. Do you need services? Does Frisco ISD have the staff or resources to provide the service in-house? If we do, did you talk to the department/staff that could provide the service?

NOTE: Frisco ISD employees or former employees that have been employed by the District in the last calendar year cannot be solicited for vendor qualification. Please confirm that your department will not ask or recommend recent former employees to apply.

#7. Will removal, installation, and clean-up services be needed at one or more locations? (list locations) Who will review the work to confirm completion?

Technology

#1. Does this RFP include technology? Describe it.

#2. Have you met with Technology? Can new technology integrate with FISD’s current tech? Will vendors access student data? If yes, have you talked to Legal?

#3. Does the technology have an annual paid subscription? Will the price increase after the first year? Do you know how much?

Schedule

#1. How quickly do you need the goods/services? What are the quality and quantity standards you expect? Will your vendor be asked to warehouse items? Do you have specific requirements for warehousing?

Vendor Walk-Through(s)

#1. Will vendor walk throughs be required? How many locations? Can you list them? What is the estimated length of time for a walk through?

#2. Do you have a planned date and time for walk through(s)? Do other departments need to attend?

General Information

#1. Will this be a one-time RFP or an RFP with the option to extend for several years? Note – In order for the RFP to be extendable, the project needs must be the same from year to year. For example, you may update the quantities or schools involved but the scope of work and equipment cannot change year to year.

Evaluation		
Evaluation Team (selected by the end-user)		
Identify 3-5 people who evaluate all bid responses or proposals based on the evaluation matrix and weights assigned to each category of the evaluation plan.		
Name:		Title:
1.		
2.		
3.		
4.		
5.		
Alternate:		
Alternate:		
Alternate:		

All evaluation team members will complete the FISD Non-Disclosure and Conflict of Interest Statement for staff participating in the planning, development, solicitation, evaluation and/or award of contracted goods and services on behalf of FISD.

#1. ***Proposal Content.*** What documents do you want applicants to provide for purposes of evaluation?

- Curriculum Vitae, Resumes, Staff Credentials, Staffing Plan
- Proposal only (do you want to limit proposals to 5, 10, 25 pages?)
- Description of facilities/Examples of past projects
- List of services offered
- Hours of operation

Other items to request.

#2. ***References.*** The Buyer collaborates with campus and department staff to develop a plan for completing reference checks for high-scoring vendors, as necessary.

#3. ***Scoring Rubric.*** Evaluative criteria and relative weights: Frisco ISD must consider the below criteria in awarding contract or bid (TEC 44.031). The maximum score is 100 points. Review the basic evaluation tool and decide which elements are most important and assign points based on importance.

RFP Evaluation Tool		
44.031(b)(1): The Purchase Price		
#1		
#2		
#3		
#4		
44.031(b)(2): The reputation of the vendor and of the vendor's goods and services		
#1		
#2		
#3		
#4		
44.031(b)(3): The quality of the vendor's goods and services		
#1		
#2		
#3		
#4		
44.031(b)(4): The extent to which the goods/services meet the district's needs		
#1		
#2		
#3		
#4		
44.031(b)(5): Vendor's past relationship/past performance with FISD		
#1		
#2		
#3		
#4		
44.031(b)(6): Impact on the ability of FISD to acquire the vendor's goods and services		
#1		
#2		
#3		
#4		
44.031(b)(7): Long-term cost of buying the good and services, to include annual renewals, maintenance, upgrade, ongoing training, etc.		
#1		
#2		
#3		
#4		
44.031(b)(8): Texas-based company: For a contract for goods and services, other than goods and services related to telecommunications and information services, construction and maintenance, or instructional materials, whether the vendor or vendor's parent company or majority owner: (A). has its principal place of business in this state; or (B). employs at least 500 people in the state of Texas.		
44.031(b)(9): Other relevant factors		
#1		
#2		
#3		
#4		
	TOTAL POINTS:	**100**

#4. Will you invite vendors to a finalist interview or presentation at Frisco ISD that will be evaluated by staff?

#5. Will staff that evaluated proposals score finalist presentations? (List names) Why do we need different staff to review?

Staff Evaluators: Presentations, not Proposals		
Name	Name	Name

#6. Will presentation evaluators use the same rubric used to evaluate proposals? If not, what will be different?

#7. Will you provide a set of standard questions to every vendor for presentations? When will you give those to Purchasing to distribute?

#8. Will the presentation be a standard format? (EX: 1-hour with 30-minute presentation and 30-minute Q&A)

Qualification Methods		
Review and select the most appropriate qualification method.		
Award by Line Item	Multiple vendors may be awarded as each line item will be awarded to vendor offering best value.	
Multiple Award	Multiple vendors with like or similar products and services will be qualified to meet FISD need. End users must get quotes when making purchases.	
Ranking Multiples	Vendor submissions are ranked, and highest scoring vendor is qualified. End users do not need quotes but must use highest scoring vendor. Secondary, tertiary qualifications on file to ensure we can meet FISD needs.	
Single Award	FISD will award a contract to only one vendor.	

FISD Staff Roles & Responsibilities	
Role	**Responsibilities**
FISD Purchasing Department Purchasing/ Buyer	• Develop and review specifications and scopes of work with input from subject matter experts. • Identify and select the most appropriate procurement method. • Submit documents for end-user approval. • Prepare and advertise solicitations and send invitations via the Ion Wave system and emails. • Research additional vendor contacts for bidding opportunities. • Serve as the primary point of contact for vendor communications regarding solicitations. • Collect and review evaluator Non-Disclosure and Conflict of Interest forms before evaluations. • Provide evaluators with evaluation matrices and proposals, ensuring all evaluation materials are collected afterward. • Guide evaluation team and facilitate the evaluation process. • Prepare board agendas and qualification award documents.
End-user Department Contract Manager and/or Director	• Participate with the Purchasing team in the solicitation process. • Collaborate with other departments to ensure the RFP clearly states all FISD requirements needed for the project and review of all contract documents. • Define any special terms and conditions for the solicitation. • Provide input for specifications and scope of work. • Review and approve the solicitation draft before it is issued. • Select and appoint evaluation team members; complete timely evaluation before the scheduled board agenda is required. • Provide the Purchasing/Buyer with email addresses of target vendors to invite to submit a bid; provide Purchasing with any additional resources for identifying other vendors that provide like goods and services. • Verify the accuracy of invoices and authorizing payments consistent with the contract terms. • Provide information to the Legal Department, as necessary

ATTACHMENT 2: RISK ASSESSMENT & MONITORING

FRISCO INDEPENDENT SCHOOL DISTRICT

Making a purchase? Start here

End-User Purchasing Decision Tree

I want to make a purchase using district funds

1 How much do you plan to spend?

Under $50K: get quotes
$50K–$1M: quotes + Best Value form

Over $1M → **Send to Purchasing**

Submit a Purchasing help desk ticket

Send a ticket when:

- Spend is over $1M
- New vendor — then go back to Question 3
- New process, new tech / AI, or in place less than 2 years

Confidential Student or Staff information — see below

Under $1M

2 Is this a new vendor for FISD?

Yes → **Send to Purchasing**

No

3 Will the vendor see student data or connect to our systems?

No → **Good to go**

Make your purchase

Follow the Operating Guide

No ticket needed

Yes

4 Unchanged for the past 2+ years?

Nothing new added — no new process, technology, or AI, and the same data use

Yes → **Good to go**

No → **Send to Purchasing**

WHAT HAPPENS NEXT — PURCHASING TAKES IT FROM HERE

Purchasing checks the risk — Result: Low, Medium, or High

Low

You make the purchase per the Operating Guide

Medium

Purchasing handles the purchase:

- Sends a written quote request
- Helps you build an evaluation tool
- Brings in district experts to evaluate
- Checks references + public records
- Writes down what it finds, as it goes
- Helps negotiate the contract

High

Purchasing issues a full, formal procurement — RFP, RFQ, or competitive sealed bids

Taken to the Board

Medium + High awards go to a Board meeting for approval

Yearly check-ins after the purchase

Medium risk: at least one check each year
High risk: at least two different checks each year
High-risk contracts are re-scored every year

Green — go ahead on your own ● Purple — send to Purchasing ● Gold — Medium risk ● Red — High risk

What Staff Need to Know

Quick guide for secretaries, principals, and other staff who request or work with new vendors

Purpose: Help Purchasing identify vendors that need extra review before they are fully used. Submitting the right information early can prevent delays.

Submit a Purchasing Help Desk ticket in LF when any of these apply

Check	Vendor or purchase involves…
1	Access to student data
2	A connection to confidential student or staff information
3	A plan to spend over $1M with this vendor

What you need to do

1	Open a Purchasing Help Desk ticket in LF.
2	In the ticket, explain whether the vendor will have access to Confidential Student or Staff Information, district technology, or New Tech & AI.
3	Submit the ticket early for a large, sensitive, or unusual purchase.

What happens behind the scenes

1. Information review Purchasing reviews vendor information during the bid and contract process.	2. Risk flag A vendor involving student data or technology may be flagged for added review.	3. Main review The full review usually happens when the contract is submitted.
Low **You make the purchase per the Operating Guide**	**Medium** **Purchasing handles the purchase:** **• Sends a written quote request** **• Helps you build an evaluation tool** **• Brings in district experts to evaluate** **• Checks references + public records** **• Writes down what it finds, as it goes** **• Helps negotiate the contract**	**High** **Purchasing issues a full, formal procurement — RFP, RFQ, or competitive sealed bids**

Why this matters?

If required information is not identified early, the contract or requisition may be delayed or returned for correction.

SIMPLE RULE

- Spend is over $1M
- New vendor
- New process, new tech / AI, or in place less than 2 years

ATTACHMENT 3: TRAVEL & REIMBURSEMENTS

ATTACHMENT 3: TRAVEL & REIMBURSEMENTS

Documents for Travel Payments & Reimbursements	
Type	**Documentation Required**
Field Trips, Competitions, Athletics, and Other Students	1. Invoice or contract stating who, what, when, where & how much. 2. Class or group name and list of all attendees: students, staff, non-staff, if available. 3. Administration approval if overnight travel. 4. 1ST approval for Out of State for students and staff.
Camp Deposits	1. Itemized invoice OR signed contract that states the deposit amount (alt pay for the deposit; NTE for the balance. Enter your NTE req for standard PO before camp. Estimate a higher number of attendees). 2. 1410 approval must be attached showing approval thread.
Meals -Student (Only) Post District Advance (state, national competition)	1. Itinerary for campus, department, or club, if an overnight and/or out-of-district trip 2. Event/conference registration form stating who, what, when, where, how much 3. Event information: who, what, when, where and how much, if not stated on registration. 4. List of students and staff traveling 5. Approved Check Request/Travel Reimbursement Form Signed by the employee and supervisor. It must identify the number of meals, price per meal, and total amount for each planned day of travel. 6. 1ST approval for Out of State for students and staff.
Registration Fees Conferences/Works hops	1. Completed registration form that identifies who, what, when, where, and how much. 2. Conference information if not on registration: Who, what, where, when & how much. 3. 1ST approval for Out of State. 4. 1410 approval must be attached showing approval thread.
Memberships	1. Detailed membership application/renewal form including the staff person's name and cost of membership.
Mileage (Local Travel)	1. Local Travel log signed and dated by employee and supervisor. MUST be submitted for payment on a monthly basis. Ensure employees do **not** receive mileage stipends before submitting. **Mileage begins@ at home campus only.** 2. Google or another map.
Mileage (Intra-District)	1. Intra-District Mileage Log-employee and supervisor signature and date. Submitted for payment on a monthly basis. Ensure employees do **not** receive mileage stipends before submitting.

**IST Approval must be attached if out of state or within a 50-mile radius of the home campus.*

Documents for Travel Payments & Reimbursements	
Type	**Documentation Required**
Mileage (reimbursement)	Can be combined on one reimbursement form with other travel expenses. 1. **Mileage begins@ home campus only.** Google or another map 2. Copy of registration & information demonstrating required travel. 3. Check Request/Travel Reimbursement Form signed and dated by employee and supervisor.
Parking	Can be combined on one reimbursement form with other travel expenses. 1. Original receipt for parking & proof of payment 2. Convention/Class registration info for event attended/purpose of travel. 3. Check Request/Travel Reimbursement Form signed and dated by the employee and supervisor.
Employee Meals	Can be combined on one reimbursement form with other travel expenses. 1. Meals listed by B/L/D for each day. 2. Copy of conference, class, or meeting registration or information demonstrating FISD-required travel. 3. Conference agenda listing any provided meals. Staff will not be reimbursed for provided meals even if staff do not accept the meal. 4. Request no more than the established per diem. 5. Staff will receive 75% of the daily meal per diem on first and last days of travel, unless traveling with students. 6. Check Request/Travel Reimbursement Form signed and dated by employee and supervisor.
Gas Receipts (Only for District Vehicles and Rental Cars)	Can be combined on one reimbursement form with other travel expenses. **Staff may request mileage or gas reimbursements, NEVER both.** 1. Copy of rental car receipt or district vehicle approved request. 2. Conference/event registration or information demonstrating FISD-required travel. 3. Check Request/Travel Reimbursement Form signed and dated by the employee and supervisor.

Approved employee travel expenses will be reimbursed upon return only.

Receipts must match the reimbursement amount exactly: Date on receipt must match the date on the check request form.
All forms must be typed- HADWRITTEN FORMS WILL NOT BE ACCEPTED.

ATTACHMENT 4: REQUISITION REVIEW ITEMS

Requisition Check List

1. *Open the RQ Approval Queue*

A. Ensure Vendor Field is complete for all RQ's in Queue
B. Ensure Buyer Field is complete for all RQ's in Queue.
C. Review/Confirm PO email address

2. *Description*

A. Description
- What are they buying?
- Is item covered through current contract used by FISD
- Does the description include FISD requirements?
- NTE or Blanket PO in Description if needed

B. Description of event if NTE

C. Description of purchase if Blanket PO

- Department versus campus?
- Blanket approval email, if needed
- Or, rate * hours = total for a service under contract
- Is it an allowable blanket based on green book?

D. Does description match quote description provide by the vendor?

E. Can vendor understand what is being ordered?

3. *Quantity/Unit/Item Total Columns*

A. Does Quantity, Unit Price and Item total match the Quote provided by vendor?
B. Do Blanket PO's utilize this section?
C. Does pricing match the vendors bid price or updated pricing?

4. *Requisition Total*

A. Does RQ Total match Quote total provided by vendor?
B. Does the RQ total require 1-3 quotes, and are required quotes attached?

5. *Approval Groups*

A. Ensure toner Purchases went through Campus/Tech approval group
B. Ensure Fed fund 200 series went through compliance approval group For Federal grants
C. Ensure state grants go through compliance approval group
D. Ensure Technology Purchases are made by Technology

6. *Alt Pay Requirements*

A. Verify RQ is NOT a reimbursement to an employee, parent, or student.
B. Verify RQ is NOT a membership fee being paid in advance.
C. Verify End User is NOT wanting a check to make payment (at the door).

7. Comments Section

A. Ensure Accurate Comment regarding NTE, Blanket PO, Attachment, and Pick Up Check
B. Verify any that say, “pick up check” and ensure they are correctly using phrase and system.

8. Identify non-compliant purchases

A. Did services start before PO was issued?
B. Did we receive items before PO was issued?
C. Did services start before the contract was signed?

9. Attachments

A. Travel approval forms—

- Completed registration form that identifies who, what, when, where, and how much.
- Conference information if not on the registration: who, what, where, when & how much.
- IST approval if out of state
- 1410 approval must be attached showing the approval thread.

B. Correct number of quotes attached
C. Contracts
D. Registration forms
E. 865 Student minutes/approval form
F. Non-Compliance forms
G. Grant Approval forms

10. Vendor Page

A. Vendor is current
B. Contract is current
C. Vendor accepts PO’s
D. Correct vendor is being used for the purchase

ATTACHMENT 5: ALT PAY REQUIREMENTS

Alt-Pay Check List (End user needs a check; there is nothing to receive in eFin, and the invoice amount is final)

1. ***Intra-District Mileage***

    A. Use the standardized Intra-District Travel Log form found in the resource center. Handwritten forms are not acceptable.
    B. Make sure to use the most current form with the current mileage rate.
    C. Make sure employee name and ID # on mileage form matches the req.
    D. Make sure mileage & dollar amount on req matches the attachment.
    E. Check budget & account codes.
    F. Check to make sure the form is signed by the employee & supervisor.
    G. Make sure lines are completed and accurate.
    H. Do not need a Google map to show mileage.
    I. This form shows the mileage and dollar amount on the bottom of the form.

2. ***Local Mileage***
    A. Use the standardized Local Travel Log found in the resource center. Handwritten forms are not acceptable.
    B. Make sure to use the most current form with the current mileage rate.
    C. Make sure employee name and ID# on mileage form matches the req.
    D. Make sure mileage & dollar amount on req matches the attachment.
    E. Check budget & account codes.
    F. Check to make sure the form is signed by the employee & supervisor.
    G. Make sure lines are completed and accurate.
    H. Google/MapQuest maps or odometer readings are required.
    I. This form shows the dollar amount on the top right of the form.

3. ***Employee Check/Travel Reimbursement Form***

4. ***Out-of-state/Overnight Travel Approval***

Requisition attachments must include:

    A. If overnight stay is out-of-state or within a 50 miles radius of the home campus, an approval from an IST member via email or overnight travel approval form is required.
    B. Use the standardized Check Request/Travel Reimbursement form found in the resource center. Handwritten forms are not acceptable.
    C. Google or MapQuest map if needed for mileage reimbursement
    D. Receipts for; airfare, hotel, conference registration, parking, toll, car rental, gas, (only for district vehicles and rentals) and other qualified reimbursable expenses.
    E. Agenda/itinerary/email for conference explaining reason for travel.
    F. If meals are requested for a conference, a conference agenda is needed to verify that meals were not provided.

Before approving the requisition:

    A. Make sure employee name and ID # on the check request form matches the req.
    B. Make sure departure dates, city & state, and purpose of travel is filled out.
    C. Check to make sure the form is signed by the employee & supervisor.

D. Check receipts for requesting reimbursements.
E. Make sure lines are completed and accurate.
F. Check budget & account codes.
G. Employees are only allowed (2) meals on travel days (departure/arrival). If traveling with students, employees are then eligible for the same number of meals as the students.
H. Employees are only allowed (3) meals per diem on overnight day(s) and (1) incidental per overnight hotel stay. If traveling with students, employees are then eligible for the same number of meals as the students.
I. Employees will not be reimbursed for meals that are included in the conference.

5. ***Employee Check/Travel Reimbursement Form***

Day Travel 50-mile radius and other reimbursements Requisition attachments must include:

A. Use the standardized check request/travel reimbursement form found in the resource center. Handwritten forms are not acceptable.
B. If overnight stay is requested, an approval from an IST member is required.
C. Google or MapQuest map if needed for mileage reimbursement
D. Receipts for meals, parking, tolls, conference registration, and other qualified reimbursable expenses.
E. Agenda/itinerary/email for conference explaining reason for travel.

Before approving the requisition:

A. Make sure employee name and ID# on the check request form matches the req.
B. Make sure departure date, city & state, and purpose of travel is filled out completely.
C. Check to make sure the form is signed by the employee & supervisor.
D. Check receipts for requesting reimbursements.
E. Make sure lines are completed and accurate.
F. Employees will not be reimbursed for meals that are included in the conference.
G. Employees are only allowed (2) meals on travel days (departure/arrival). If traveling with students, employees are then eligible for the same number of meals as the students.
H. Check account & budget codes.

6. ***Student Meals Check/Travel Reimbursement Form***

Note: Most student meals are from Athletics, Fine Arts & CTE

Requisition attachment must include:

A. Use the standardized check request/travel reimbursement form found in the resource center. Handwritten forms are not acceptable.
B. If out of state an overnight approval from an IST member via email or overnight travel approval form.
C. Students roster including coach/sponsor.
D. Event Itinerary.

Before approving the requisition:

A. Make sure employee name and ID # on the check request form matches the req.
B. Make sure departure date, city & state, and purpose of travel is filled out.
C. Make sure the student roster matches attachment and req.

D. Make sure lines are completed and accurate with student and coach/sponsor lunch amounts itemized by breakfast, lunch & dinner.
E. Check budget & account codes
F. Check to make sure the form is signed by the employee & supervisor.

7. ***Camp/Event Deposits***

Note: Most deposits for alt pays are field Trips, camps & proms

Contract/invoice must be attached to the *requisition*.

A. Make sure the contract is signed by an authorized employee (Purchasing Director, CFO, Superintendent, Board President, as appropriate).
B. Make sure the deposit matches the attachment and req.
C. The remaining amount due, that will be paid after the deposit, must match the attachment and req.
D. Check budget & account codes
    1) 6412 - Student travel
    2) 6411 - Staff travel
    3) 6419 - Non-staff travel
    4) 6499- other misc. Deposits, license fees
    5) 6269 – facility rental