

## Frequently Asked Questions – Purchasing

### **1. How do I find purchasing related information?**

Purchasing related information can be found on the district's website and on the Intranet. Warehouse order information and links to both vehicle rentals and Office Depot can be found on the district's intranet site under Purchasing. Bid tabulations, purchasing forms, and an Approved Vendor List can be found on the district's website ([www.pfisd.net](http://www.pfisd.net)).

If you have questions or need assistance in any way, please contact any member of the purchasing department. We will be glad to assist.

### **2. How can you track a purchase order?**

Tracking PO Requests in Focus is simple. To find the status of a Request from the current year click on the Purchasing/Accounts Payable tab, then select Purchase Requests/Orders and Request History. Here you will be able to see any Requisitions you have entered and where they are in the approval process. You will also have the ability to drill down into each to see purchase details. To check on Requisitions from another fiscal year, simply change the period in the drop down box located in the top right hand corner. If for some reason you are unable to locate your Requisition, contact your purchasing specialist.

### **3. How to find the Approved Vendor list.**

To locate the approved vendor list go to the main page of the Pflugerville ISD website. Click on **Departments, Purchasing, Information for Employees**, and choose **Approved Vendor List**. You can search by bid category or vendor name. All approved vendors (both PfISD Bid Approved and Co-op) are listed. If you cannot locate the vendor you are looking for call the Purchasing Department.

### **4. If an approved source is more expensive than a non-approved source, do we have to use the approved source?**

Not always. However, we do have to treat vendors fairly. You should not approach an unapproved vendor and ask if they can beat a certain price. The appropriate method is to ask each vendor for the best price they can give you and then submit those quotes along with the purchase order.

### **5. Can we buy from vendors at conventions?**

If you are using a purchase order, and the purchase is less than \$1000, you can. If you are going to use a pay request, you must follow the guidelines specific to use of a pay request.

### **6. The vendor list is not updated. Vendors such as Wal-Mart and Sam's are missing.**

The vendor list is always changing. Each year, thousands of vendors are given the opportunity to become an approved district vendor. Unfortunately, many of those vendors choose not to participate. Over the past 5 years, we have contacted 100's of companies

attempting to encourage them to submit the appropriate paperwork. Several popular vendors have never participated or they have allowed their contracts to expire. Remember to always check the approved vendor list prior to your purchase; a vendor that was approved last year may not necessarily be approved this year.

**7. Why are reimbursements for under \$50 only allowed to be used with approved vendors?**

Because, according to Texas law, the purchase order is the prescribed manner of doing business. Use of the purchase order ensures that the funds have been set aside for that particular purchase and that all relevant legal guidelines and board policies have been met. When you use a reimbursement, there is no way to ensure that the funds have been set aside, or that legal guidelines and board policies have been met.

**8. Why can't we use unapproved sources for catering?**

Catering is a category of products for which the district spends in excess of \$50,000 per year. The legal threshold requiring a formal bid is \$50,000. In addition, board policy states that all purchases exceeding \$50,000 will require Board approval. Therefore, a bid process was carried out, and the vendors that responded were approved by the Board. While exceptions are made we prefer to use approved vendors as they have taken the time to respond to our bid and agreed to do business with PISD according to our terms.

**9. Why do we have to use approved vendors?**

Texas law and Board policy require us to use approved vendors whenever possible. Approved vendors have provided all legally required paperwork and have agreed to do business in the manner required by the district's Board of Trustees. For example, you may need to make a \$120 office supply purchase. On the surface, this seems like an insignificant matter. However, Texas law requires school districts to conduct formal bids for all categories of products that exceed \$50,000 in *aggregate* in one school year. Last year, the district has spent approximately \$400,000 for office supplies. Frequent purchases made through unapproved vendors do not follow Board policy and is also illegal. The State of Texas can levy fines on the district and prosecute responsible persons for Texas purchasing law violations.

**10. When approved vendors don't have the exact item we want, can we purchase it from an unapproved vendor?**

If an approved vendor has a comparable item, you should use the approved vendor. (For example, same item but different brand.) If you are unable to use the item from the approved vendor, attach an explanation for selecting a non-approved source to your Requisition.

# Pflugerville ISD

## Executive Summary of Local Purchasing Procedures

To insure that the District is legally compliant and within the limitations set by Board policy, the following purchasing procedures are also enforced.

*When the District seeks to purchase personal property of a value of at least \$1,000 but less than \$50,000, in the aggregate, for a 12-month period, the District must obtain at least 3 written quotes from a list of vendors maintained by the Purchasing Department.*

### **District Purchasing Procedure**

Deputy Superintendent approves all purchase orders of a value that are between \$5,000-\$24,999.

### **District Purchasing Procedure**

Superintendent approves all purchase orders of value that are more than \$25,000.

### **District Purchasing Procedure**

*When the District seeks to purchase personal property of a value less than \$1,000, the most economical source will be sought.*

### **District Purchasing Procedure**

## Levels of Review and Approval Required for Contracts and Purchase Orders

Amount of P.O. or Contract	Budget Manager	Purchasing Coordinator	Deputy Superintendent	Superintendent	Board of Trustees
\$0-\$4,999.99	✓	✓			
\$5,000 - \$24,999	✓	✓	✓		
\$25,000 - \$49,999	✓	✓		✓	
\$50,000 +	✓	✓		✓	✓

The amounts listed above represent the total dollar volume of purchases for a related class of items, in the aggregate, for a 12 month period (usually the fiscal year). It is in violation of State law to submit separate and sequential purchase orders to avoid the competitive bid process.

If additional unanticipated purchases are made requiring a higher level of approval, competitive bidding and/or Board approval (when applicable) will be secured as soon as possible.

Any employee of the district entering into a contract for goods or services must immediately forward the contract to the Purchasing Department for evaluation and approval. They will provide support and direction, and facilitate consultation with legal counsel if necessary. Except as noted below, all district contracts will be signed by the Superintendent or Deputy/Assistant Superintendent when acting as designee. All original district contracts are maintained by the Purchasing Department.

Principals, Directors, and Executive Directors may sign contracts or agreements with certain companies providing student services such as yearbooks, senior rings, graduation invitations or school photographs.