



CONROE ISD LEADS:  
COMMUNITY COLLABORATIVE



# PROCUREMENT

OVERVIEW OF PURCHASING  
GUIDELINES AND PROCEDURES



## RICK REEVES, RTSBA

DIRECTOR OF PROCUREMENT & BUSINESS SERVICES

21 YEARS IN PROCUREMENT

11 YEARS IN PUBLIC PROCUREMENT (ALL WITH CONROE ISD)

REGISTERED TEXAS SCHOOL BUSINESS ADMINISTRATOR (TEXAS ASSOCIATION OF SCHOOL BUSINESS OFFICIALS)

PRESIDENT, CENTRAL TEXAS PURCHASING ALLIANCE

5-TIME TASBO PURCHASING OPERATIONS AWARD OF MERIT RECIPIENT





- ▶ *Doing Business with CISD*
- ▶ *Purchasing Law*
- ▶ *The Bid Process*
- ▶ *Cooperative Purchasing*
- ▶ *Awarded Vendors*
- ▶ *E-Procurement*





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# DOING BUSINESS WITH CISD





## PURCHASING 101

- ▶ "Formal process of buying goods or services"
- ▶ 1. Identify a need
- ▶ 2. Locate a vendor
- ▶ 3. Negotiate an agreement
- ▶ 4. Submit a Requisition / purchase order
- ▶ 5. Receive goods/services
- ▶ 6. Process payment
- ▶ 7. Contract Evaluation





### Mission statement:

Support Conroe ISD's "Commitment to Excellence" by managing the procurement process to continuously serve the needs of our students, educators, and administrators. Our main goal is to secure the right products and services at the best value, delivered in a timely manner to the correct location all while being an approachable resource for our employees and vendors. We will accomplish this by doing the following consistently:

- ▶ *Manage the uninterrupted flow of goods and services to meet the district's needs.*
- ▶ *Strive to get the best value for every dollar spent while conducting business in a manner consistent with exemplary business practices.*
- ▶ *Initiate and maintain effective and professional relationships with district personnel and current vendors to create a positive work environment.*
- ▶ *Pursue innovative and creative ways to source quality products and services and lower costs in every area of our operation.*
- ▶ *Protect the financial integrity of the district through negotiations and unwavering ethical practices.*
- ▶ *Promote a sense of community by encouraging local vendors to participate in the purchasing process.*
- ▶ *Commit to observe all applicable laws and rules and regulations as published and amended by the Conroe ISD School Board, the State of Texas, the Texas Education Agency, and United States Government.*

# Procurement Services

## INFORMATION FOR VENDORS

- DOING BUSINESS WITH CONROE ISD +
- CURRENT BID OPPORTUNITIES +
- PURCHASE ORDER TERMS AND CONDITIONS +
- FORM 1295 +
- CONFLICT OF INTEREST +

### Conroe ISD Vendor Guidance

Established in 1892, Conroe ISD is a 348-square-mile school district that covers The Woodlands, Shenandoah, Oak Ridge North, Conroe, and Grangerland, as well as several other smaller towns, communities, and unincorporated areas in Montgomery County, Texas. As the 9th largest district in Texas and the 60th largest in the U.S., Conroe ISD serves approximately 71,000 students across 67 campuses and is one of the fastest growing districts in the State with current enrollment growth exceeding 3,000 students per year. In addition to being the largest school district in Montgomery County, Conroe ISD is the largest employer with over 10,000 employees.

The District is a political subdivision of the State of Texas. It operates under specific legal requirements for the acquisition of goods and services. Conroe ISD is exempt from most state and local taxes. Tax-exempt forms will be supplied upon request by the Purchasing Department.

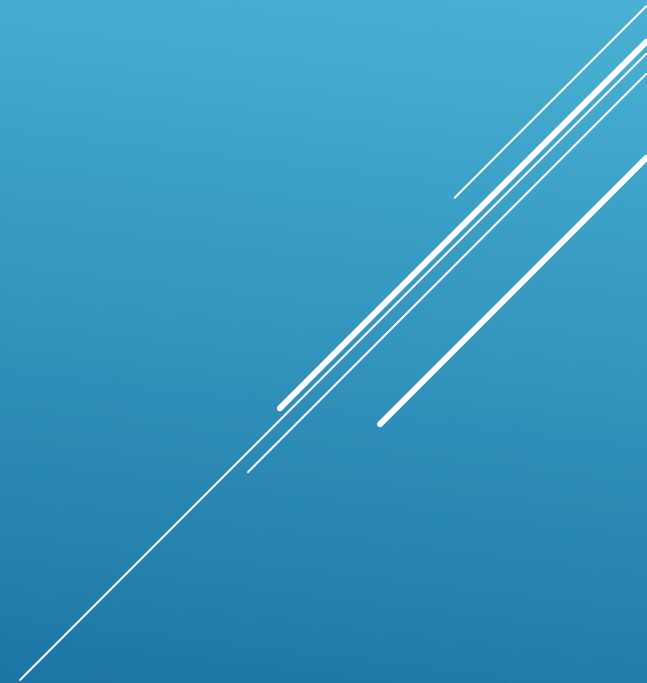
Although oversight of the purchasing process is centralized, most purchasing decisions are site-based. The focus of the Purchasing Department is on educating our staff so that most purchases are made directly by the campus/department and to encourage the control of expenditures at these levels. By using district wide contracts, cooperative programs, and constant communication, our staff receives the support they need to make sound purchasing decisions.

All vendors must be selected under one of the procurement methods stipulated in section 44.031 of the Texas Education Code approved by the Conroe ISD Board of Trustees before Conroe ISD can begin using their goods and/or services. Conroe ISD requires all vendors to have an approved procurement instrument (i.e., purchase order, term contract, master service agreement, etc.) in place prior to providing goods or services. Entering into contracts verbally, or without appropriate authorization is prohibited and a violation of state law. **Any vendor who delivers goods or services to Conroe ISD without a proper contract is doing so entirely at their own risk.** Conroe ISD does not pay for goods or services that were provided without the benefit of a properly executed procurement contract. Regardless of contract type and method of submission, all contracts must be reviewed and approved by Procurement Services prior to services being rendered



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# PURCHASING LAW





# PURCHASING 101



## ▶ What must be followed:

- ▶ Education code
- ▶ Local government code
- ▶ Government code
- ▶ Texas attorney general opinions
- ▶ Legal & Local board policy
- ▶ Business and commerce code
- ▶ Agriculture code (USDA/TDA)
- ▶ Health and safety code
- ▶ Occupations code
- ▶ Code of federal regulations

Texas Education code chapter 44 – fiscal management

- ▶ Section 44.031 - Purchasing contracts

Texas government code chapter 2269 – construction

- ▶ Defines allowable bidding methods for construction or public works projects.





# PURCHASING 101 – TEC 44.031



## PURCHASES VALUED AT OR ABOVE \$50,000

All district contracts for the purchase of goods and services, except contracts for the purchase of produce or vehicle fuel, valued at \$50,000 or more in the aggregate for each 12-month period, shall be made by the method that provides the best value for a district:

1. Competitive bidding for services other than construction services.
2. Competitive sealed proposals for services other than construction services.
3. A request for proposals for services other than construction services.
4. An interlocal contract.
5. The reverse auction procedure as defined by Government Code 2155.062(d).
6. The formation of a political subdivision corporation under Local Government Code 304.001.

*Education Code 44.031(a)*



# PURCHASING 101

## Factors in awarding a contract:

- ▶ Purchase price.
- ▶ Reputation of vendor's goods/services.
- ▶ Quality of vendor's goods/services.
- ▶ Extent to which goods/services meet needs of the district.
- ▶ Vendor's past relationship with district.
- ▶ Impact on ability of district to comply with laws relating to historically underutilized businesses (hub).
- ▶ Total long-term cost to the district.
- ▶ Bidders principal place of business / TX
- ▶ Any other relevant factor listed in the bid or proposal.

\*ec 44.031(b)





# PURCHASING 101



## “BEST VALUE”:

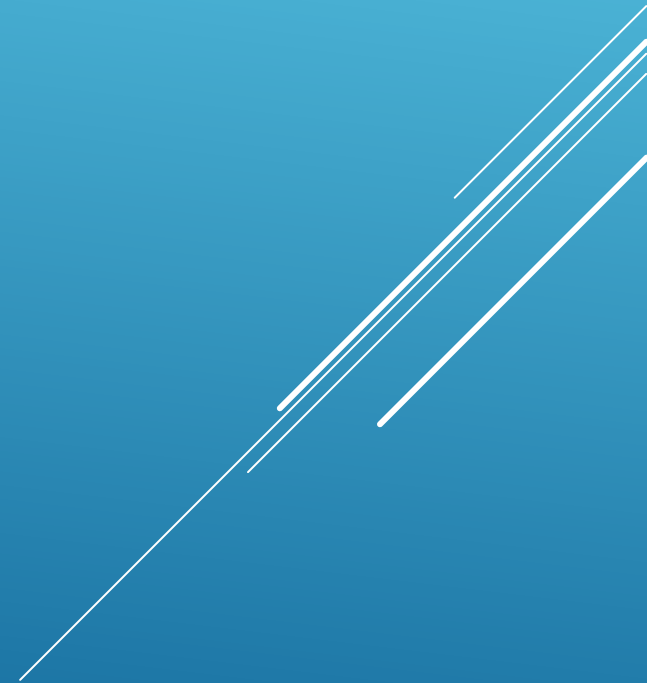
- ▶ Not based on price alone
- ▶ May consider any other factors stated in the criteria
- ▶ Warranty/Customer Service/Long-term use





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# THE BID PROCESS







# PURCHASING 101 – THE BID PROCESS



▶ 7-13 week process \*depending on complexity\*

▶ Types of bids:

- ▶ Competitive Sealed Proposal
- ▶ Request for Proposal
- ▶ Request for Qualifications (2 step)
- ▶ Request for Quotes
- ▶ Competitive Bid



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# COOPERATIVE PURCHASING



# COOPERATIVES



- ▶ “A purchasing cooperative is a type of business model with an arrangement, often among businesses, to agree to aggregate demand to get lower prices from selected suppliers.”
- ▶ Used to reduce the costs of procurement
- ▶ Used most frequently by governmental entities
- ▶ Approved by board through an interlocal agreement
- ▶ Allows entity to use contracts procured by another governmental entity
- ▶ Competitively bid contracts for different commodities



# COOPERATIVE VS BIDS

- ▶ Structure and Organization
  - ▶ Co-op – Districts join and benefit from the purchasing power of the group.
  - ▶ Bids - District independently solicits proposals, creates requirements, evaluates, and selects vendor who best meets the needs.
- ▶ Pre-Negotiation vs Competitive Process
  - ▶ Co-op members benefit from pre-negotiated contracts established by the co-op. Saves time and resources for the district.
  - ▶ Bids - Involves a competitive process where vendors compete to win the contract Evaluted and awarded on set criteria.
- ▶ Time and Resource Considerations
  - ▶ Co-op – Quicker, more resource-efficient way to secure goods and services.
  - ▶ Bids - Takes more time, effort, and man-power







**PURCHASING COOPERATIVES OFFER EFFICIENCY AND  
PRE-NEGOTIATED AGREEMENTS, WHILE BIDS PROVIDE  
MORE CUSTOMIZATION BUT REQUIRE ADDITIONAL  
TIME AND RESOURCES**



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# AWARDED VENDORS





## VENDOR SELECTION

-WHAT AND HOW  
MANY ARE NEEDED?  
ESTIMATED COST? FUNDING  
SOURCE?

COMPLIANCE WITH THE LAW

“BEST VALUE” -  
PRICE/WARRANTY/CUSTOMER  
SERVICE

CONTRACT / PAYMENT TERMS

SCHOOL DISTRICTS ARE VERY  
DEMANDING!

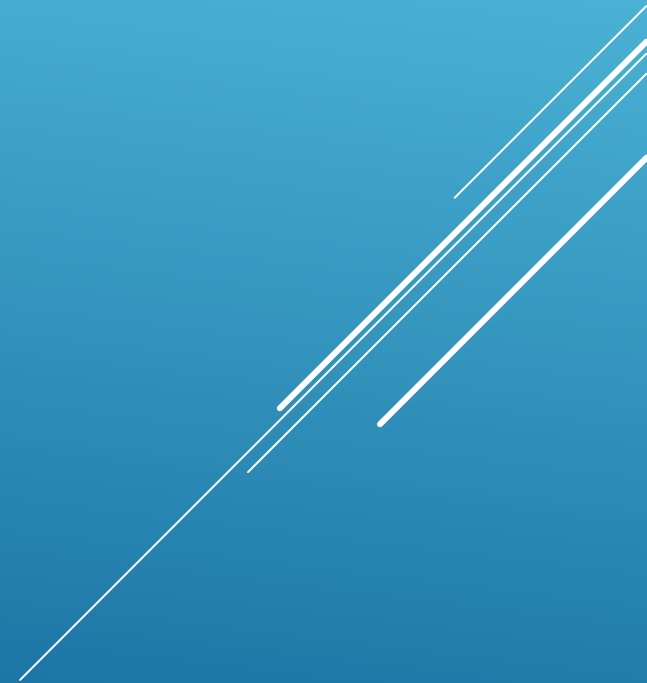
# SOURCING VENDORS

- **District-issued Solicitations**
  - Semi-annual bids, create vendor pools for goods/services
  - High volume/high cost items
    - Fuel, Trash Services, Copiers, Insurance, Employee Benefits, Chromebooks, Office Supplies, School Buses
  - Construction bids – Follow GC 2269 and board policy
    - Architects/Engineers awarded by district solicitation, illegal to use on a co-op contract in the state of Texas.
    - Construction Manager at Risk
    - Job Order Contract Program
- **Awarded Purchasing Cooperative Contracts**
  - Usually smaller volume/lower cost threshold
  - Will request a formal quote from co-op vendors to create competition (transparency)



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# E-PROCUREMENT








# E-BID PLATFORM

## VENDOR REGISTRATION & eBID SYSTEM

The CISD web-based eBid system will electronically notify registered vendors of applicable bid opportunities. It also allows registered vendors to electronically view and submit bids. Vendors pay no fees for registering or utilizing this eBid system.

**Click on the Login link below to register, view, and respond to current CISD bids.**

**Note:** Registration in this system **does not** constitute a vendor becoming an awarded vendor. A vendor must be awarded on a CISD bid or quote or a cooperative contract for which CISD is a member in order to be considered an awarded vendor.

Please refer to the [How to Register In Conroe ISD eBid System instructions](#)  for assistance. If you have questions, please contact Laura Davidson 936-709-7868.

[Login to the Conroe ISD eBid System](#)

The screenshot shows the Conroe ISD Purchasing website. At the top left is the Conroe Independent School District logo, which includes a red apple icon and the text 'CONROE INDEPENDENT SCHOOL DISTRICT'. Below the logo is a 'Welcome to Conroe ISD Purchasing' message, followed by a paragraph describing the district's mission: 'The Conroe I.S.D. Purchasing Department's mission is to support the District's "Commitment to Excellence" by managing the procurement process to continuously serve the needs of our students, educators, and administrators. Our goal is to secure the right products and services at the best value, serve our employees and vendors as an approachable resource, and observe all applicable laws, rules, and regulations set forth by the Conroe ISD School Board, the State of Texas, the Texas Education Agency, and the United States Government.'

On the right side of the page is a 'Login' section with two input fields for 'User Name' and 'Password', a blue 'Login' button, and a green 'Trouble Logging In?' link. To the right of the login fields is a blue box with a white user icon and a plus sign, and a white 'Supplier Registration' button.

Below the login section are five white buttons with blue icons and text: 'Current Bids' (document icon), 'Closed Bids' (checkered flag icon), 'Awarded Bids' (trophy icon), 'Conroe ISD' (www icon with mouse cursor), and 'How To Register In Conroe ISD eBid System' (www icon with mouse cursor).



# ADVANTAGES OF E-PROCUREMENT

**Cost Efficiency**

**Transparency**

**Increased Competition**

**Time Savings**

**Accuracy and Compliance**

**Access to Larger Supplier Base**

**Real-Time Updates and Notifications**

**Data Analysis and Reporting**

**Environmental Impact**





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# Questions?

