

TO QUOTE OR NOT TO QUOTE?

November 5, 2021

WHEN SHOULD A QUOTE BE REQUESTED?

- Always if you want to stretch your budget further (recommended).
- We have over 10,318 vendors currently awarded under a [district or Co-op bid](#).
- Vendors have the flexibility to quote better prices than what was originally submitted with the bid. I personally have seen a savings of over \$8,500 on two separate quotes this year.
- With the use of email getting quotes is now easier than ever.
 - Email multiple vendors using (BCC) at the same time to request quotes.
 - Email the vendors and thank them for their quote, that you have selected a vendor, and that you will contact them in the future.

2021-22 COLLEGE STATION I.S.D. PURCHASING LEVELS AND REQUIREMENTS

S T A T E A N D L O C A L F U N D S	Purchases with STATE AND LOCAL FUNDS (budget code Does NOT Start with "2")						S T A T E A N D L O C A L F U N D S
	Purchase Commitment Amount	Support Required	Additional Forms	RFP/RFQ	Board Approval	Advertising	
	For purchases Less than \$10,000	1 QUOTE	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED	
		OR USE OF DISTRICT OR Co-OP BID					
	For purchases of \$10,000 to \$49,999.99	2 Quotes	2 QUOTES	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED	
		OR USE OF DISTRICT OR Co-OP BID	OR Bid/Co-OP contact No.				
For purchases \$50,000 and Over	USE OF DISTRICT OR Co-OP BID	2 QUOTES RECOMMENDED	REQUIRED if not using current district bid or Co-op bid	BOARD AGENDA ITEM REQUIRED	REQUIRED for Two (2) consecutive weeks + 2 weeks for responses + 2 weeks for analysis and board meeting (6 wks)		
	Competitive Procurement/Texas Law (Education Code 44.031)						
SOLE SOURCE PURCHASE	1 QUOTE	DISTRICT SOLE SOURCE FORM COMPLETED BY EMPLOYEE	NOT REQUIRED	AGENDA ITEM REQUIRED	NOT REQUIRED		
\$50,000.00 and over Less than \$50,000 (no agenda item)							

2021-22 COLLEGE STATION I.S.D. PURCHASING LEVELS AND REQUIREMENTS

Purchases with FEDERAL FUNDS (budget code STARTS WITH "2")						
Federal Fund purchases must be tracked/aggregated by Commodity Codes/Like Type Items for all federal funds **						
Purchase Commitment Amount	Support Required	Additional Forms	RFP/RFQ	Board Approval	Advertising	FEDERAL FUNDS
For aggregate purchases Less than \$25,000.00 (Micro-purchase/Fed Funds)	1 QUOTE	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED	
For aggregate purchases of \$25,000 to \$49,999.99 by Comm. Code (Small purchase/Fed Law)	2 QUOTES Min. Recommend 3 (even if using DISTRICT or Co-OP BID)	2 QUOTES min. Can be internet print outs	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED	
For aggregate purchases \$50,000 and over by Comm. Code (Small purchase/Fed Law) Competitive Procurement/Texas Law	USE OF DISTRICT OR Co-OP BID (Education Code 44.031)	2 QUOTES Min.	REQUIRED if not using current district bid or Co-op bid	BOARD AGENDA ITEM REQUIRED	REQUIRED for Two (2) consecutive weeks + 2 weeks for responses + 2 weeks for analysis and board meeting (6 wks)	
For aggregate purchases over \$250,000 by Comm. Code (Single Acquisition Threshold/Fed Law) Competitive Procurement/Texas Law	COMPETITIVE PROCUREMENT USE OF DISTRICT OR Co-OP BID (Education Code 44.031)	Independent Est. by Purchasing prior to bid advertisement	REQUIRED if not using current district bid or Co-op bid	AGENDA ITEM REQUIRED	REQUIRED Two (2) consecutive weeks	
SOLE SOURCE PURCHASE *	1 QUOTE	DISTRICT SOLE SOURCE FORM COMPLETED BY EMPLOYEE AND TEA Form (Approval by TEA required) Rare and expect 2-3 weeks min. for response	NOT REQUIRED	AGENDA ITEM REQUIRED	NOT REQUIRED	
\$50,000.00 and over				NOT REQUIRED (if below \$50,000)		
Less than \$50,000 (no agenda item)						

* Currently TEA has approved Education Service Center 20 as a sole source vendor. All other vendors require case by case approval from TEA.

** All federal purchases will be aggregated by fiscal year by Commodity Code/Like Type Item. When we reach the \$25,000 total purchases by Commodity Code/Like Type Item the purchase is then considered a Small Purchase and 2 quotes are required. The district defines the Commodity Codes/Like Type Items, but a single PO or single vendor purchases cannot be considered an item. The list of items must be made available for TEA and/or federal auditors. CFR 200.320 (a)(1)(iii).
P:\Purchasing\Instructions-Procedures

2021-22 CSISD PURCHASING LEVELS AND REQUIREMENTS

PURCHASE COMMITMENT AMOUNT	STATE AND LOCAL FUNDS PURCHASE Support Required	FEDERAL FUNDS "2" PURCHASE Support Required
For purchases Less than \$25,000.00 (Micro-purchase/Fed Funds)	1 QUOTE OR USE OF DISTRICT OR CO-OP BID	1 QUOTE OR USE OF DISTRICT OR CO-OP BID
For purchases of \$25,000.00 to \$49,999.99 (by Commodity Code for Federal Funds) (Small purchase/Fed Law)	2 Quotes OR USE OF DISTRICT OR CO-OP BID	2 QUOTES Minimum Recommend 3 (even if using DISTRICT or Co-op BID) Quote can be internet print out.
For purchases of \$50,000 and over (by Commodity Code for Federal Funds) (Small purchase/Fed Law) Competitive Procurement/Texas Law	USE OF DISTRICT OR CO-OP BID VENDOR + 2 QUOTES RECOMMENDED + BOARD APPROVAL (Education Code 44.031)	2 QUOTES Minimum Recommend 3 (even if using DISTRICT or CO-OP BID) Quote can be internet print out. (Education Code 44.031)
For purchases over \$250,000.00 (by Commodity Code for Federal Funds) (Single Acquisition Threshold/Fed Law) Competitive Procurement/Texas Law	USE OF DISTRICT OR CO-OP BID VENDOR + 2 QUOTES RECOMMENDED + BOARD APPROVAL (Education Code 44.031)	2 QUOTES Minimum Recommend 3 (must use DISTRICT or CO-OP BID vendor) Quote can be internet print out. + Independent Est. by Purchasing prior to bid advertisement
SOLE SOURCE PURCHASE \$50,000.00 and over Less than \$50,000 (no agenda item)	1 QUOTE + DISTRICT SOLE SOURCE FORM COMPLETED BY EMPLOYEE + BOARD APPROVAL (IF OVER \$50,000)	1 QUOTE + DISTRICT SOLE SOURCE FORM COMPLETED BY EMPLOYEE + TEA APPROVAL+BOARD APPROVAL (IF OVER \$50,000)

** All federal fund purchases must be aggregated by fiscal year by Commodity Code/Like Type Item. When we reach the \$25,000 total purchases by Commodity Code/Like Type Item the purchase is then considered a Small Purchase and 2 quotes are required.

COMMODITY CODES/LIKE TYPE ITEMS FOR **FEDERAL PURCHASES ONLY**

- District defines its own Like-Type Items.
- Like-type may not be defined as a single purchase order or a single vendor.
- TEA does not limit the number of like-types that the LEA may define, nor does TEA limit the cost of the items categorized as like-types. LEAs must be aware, however, that their like-type definitions are subject to monitoring and audit.
- Effective, 2021-22, when the \$25,000 threshold by commodity code is met, we must follow small purchase procedures and collect at least two price quotes for additional purchases of items for that like-type. CFR 200.320 (a)(1)(iii).
- A Google Sheet has been created to be used to classify federal purchases based on Commodity code/Like Type items (see link below).
- [Link to Like Items \(Commodity Items\) COLLEGE STATION ISD for 2021-22](#)
- Carmella or Jennifer Hairell can help you with deciding which commodity code to use for a purchase and how to enter the commodity code in the purchasing requisition.
- Feel free to call me to discuss adding additional Like-Type Items to the list.
- [TAA 04-22-2021](#), [TAA 08-13-2021](#)
- [Self Certification 08-2021](#)

Competitive Procurement Guidelines

\$1-\$9,999: Quotations from multiple vendors not required but encouraged to obtain best value or use of district approved annual bid, cooperative, inter local agreement or state contract.

\$10,000-\$49,999: Written quotations from at least two vendors secured and attached to the requisition or use of district approved annual bid, cooperative, inter local agreement or state contract, if using state or local funds. If using federal funds, 2 quotes minimum are required when the Commodity Code reaches \$25,000.

\$50,000+: Formal competitive procurement method shall be used, or use of current district approved annual bid, cooperative, inter local agreement or state contract. One of the following competitive procurement methods that provides the best value for the District shall be used and coordinated by the Director of Purchasing. Individual purchases of \$50,000 or more must be approved by the Board of Trustees. If using federal funds, then 2 quotes minimum are required.

\$250,000+: Purchases with federal funds require the Purchasing Department to perform an Independent Estimate Determination prior to advertising for bids or proposals and a Cost and Price Analysis prior to awarding or entering into a contract.

Please note all federal purchases will be aggregated by fiscal year by Commodity Code/Like Type Item. When we reach the \$25,000 total purchases by Commodity Code/Like Type Item the purchase is then considered a Small Purchase and 2 quotes are required.