

How to Do Business with Spring Branch ISD

Vendor Relations and Purchasing Procedures

2016 - 2017



Table of Contents

	Page
Forword	3
Purchasing Department Organization	4
Texas School Laws: Purchasing	5
Education Department General Administrative Regulations (EDGAR)	5
Vendor Information	6
Supplier Diversity Program	7
Solicitation of Bids	8
Advertising of Bids	9
Submission of Bids	9
Bidder's Checklist	10
Bid Opening Procedures	11
House Bill 1295 – Certificate of Interested Parties	12
Conflict of Interest Disclosure Statement	13
Current Bids and Proposals	14
Tax Exemption	15
Processing Vendor Payments	15
Vendor Delivery Responsibilities	16
Gifts and Gratuities	16

Foreword

This booklet has been compiled and published by the Purchasing Department of the Spring Branch Independent School District as a guide to acquaint vendors and suppliers with District purchasing policies and procedures.

The primary function of the Purchasing Department is to meet the product and service needs of the District by:

- Meeting all state laws and District policies in the obtainment of the best product offering the lowest cost or best value to the taxpayer and the District
- Fair competition among bidders
- Full opportunity for all vendors to bid for District business on an equal basis
- Understanding by all bidders on the District's method of purchasing and basis of award
- Constantly seeking to identify and implement strategies and techniques that will enhance the level of service and integrity provided by the Purchasing Department

Spring Branch Independent School District

Superintendent of Schools	Scott R. Muri, Ed.D.
Associate Superintendents	
Research & Design	Elliott Witney
Talent & Operations	Jennifer Blaine, Ed.D.
Academic Performance & Support	Tyler Ream, Ed.D.
Finance	Karen Wilson
Chief Information Officer	TBD
Community Relations Officer	Linda Buchman

Purchasing Department Organization

Director of Purchasing and Contracts	Barbara Robillard
Administrative Assistant to the Director	Elvanna Galbreth
Manager of Central Warehouse, Textbooks, Logistics, and Auctions	Wayne Schaper, Jr.
Manager of Purchasing Operations and Records	Edna E. Johnson
Central Warehouse Team Leader	Kenneth Shorts
Administrative Bid Specialist	Joel Cardona
Compliance Specialist	Tameisha Davenport
Contract Specialist	Nina Shephard
Construction and Technology Buyer	Gerald McCall
Senior Buyer	Cristina Varisco
Buyer	Monica Landaeta Calderon
Records Management Specialist and Central Warehouse Buyer	Jessica Escobar-Galvez
MUNIS Support and Textbook Specialist	Emilyn Verdinez

Location: 1031 Witte Road, Building T-1A
Houston, Texas 77055-6016

Phone Number: 713-251-1100

Fax Number: 713-251-1115

Office Hours: 7:30 A.M. – 4:30 P.M. (Monday – Thursday)
7:30 A.M. – 4:00 P.M. (Friday)

Website:
<http://cms.springbranchisd.com/skin2/Purchasing/tabid/16019/Default.aspx>

Texas School Laws: Purchasing

District contracts valued at \$50,000 or more in the aggregate for each 12-month period shall be made by one of the following methods that provides the best value for the District:

1. Competitive bidding
2. Competitive sealed proposals
3. Request for proposals
4. An interlocal contract
5. A method provided by Chapter 2267, Government Code, for construction services
6. Reverse Auction
7. Political subdivision

Education Code 44.031(a)

Education Department General Administrative Regulations (EDGAR)

The new regulations from the Office of Management and Budget (OMB), codified as Title 2 of the Code of Federal Regulations (2 CFR) Part 200, were incorporated into general federal regulation on Dec. 26, 2014. The new regulations govern all federal grants awarded by the US Department of Education (USDE) to the state or to an LEA on or after that date.

When SBISD seeks to procure goods and services using funds under a federal grant or contract, specific federal laws, regulations, and requirements may apply in addition to those under state law.

This includes, but is not limited to, the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R. 200 (sometimes referred to as the "Uniform Guidance" or new "EDGAR").

Vendor Information

Spring Branch Independent School District continuously solicits prospective vendors for bids on categories of personal property as required by *Section 44.031* of the *Texas Education Code*.

The district has selected vendor qualification criteria that includes, but is not limited to, the following:

- Past experience with the district
- Cost of goods and services, including future costs of maintenance
- Vendor's financial stability and position as it relates to the ability to provide the goods and/or services
- Small, minority, woman-owned, or labor surplus area firms

The district shall not restrict vendor competition by requiring any of the following as selection criteria:

- Unreasonable requirements, such as excessive experience or bonding, brand name products or geographic preferences that would unduly restrict competition among qualified vendors
- Arbitrary restrictions that are not essential to the bid/proposal specifications

Any vendor wishing to do business with Spring Branch Independent School District may mail or fax a letter to us, describing in detail the categories of goods and services they offered.

Address to: Spring Branch ISD Purchasing Department
Joel Cardona, Administrative Bid Specialist
1031 Witte Road, Building T-1A
Houston, Texas 77055-6016
Phone: 713-251-1107
Fax: 713-251-1115

Or you can register online through Vendor Self Service (VSS) at <https://spartan.springbranchisd.com/MSS/Vendors/Registration/Default.aspx>.

A current [W-9 form*](#), [EFT](#), [Conflict of Interest Questionnaire*](#), [Local Criminal Background Check](#), and a [Fingerprinting Affidavit](#), (if applicable) will be required prior to any business opportunity with the District.

**These forms may be printed from the SBISD website and uploaded directly into the VSS system during registration.*

Although registering through [Vendor Self Service \(VSS\)](#) with SBISD will place you on the list of potential vendors, it does not guarantee any level of business expenditure by the District. Please note that the Purchasing Department will be happy to meet with you to discuss the competitive bidding process or VSS. Always remember that we are here to help, so if you would like to schedule an appointment to meet with a member of the Purchasing Department, please [contact our staff](#).

Supplier Diversity Program

The SBISD Supplier Diversity Program (SDP) ensures that the District will use its best efforts to encourage small, minority and women-owned businesses to participate in current and future purchasing of all goods and services.

Certification: Any business wishing to be identified by SBISD as a small, women-owned or minority business shall be certified as such either:

- By the State of Texas or Texas Local Government which conducts a certification program; or
- By “self-certification” of a business entity under one of the definitions listed above.

Solicitation of Bids

When the District identifies a commodity or service that meets the bid requirements, an "Invitation to Bid" document will be emailed to all vendors on the Vendor Distribution List for that specific commodity. Vendors may be added to a Distribution List by sending an email to the Purchasing mailbox at Purchasing@springbranchisd.com. Please provide your name, company name, street address, phone number, fax number, and bid/proposal number in your message. You will be notified of any changes.

Complete bid/proposal documents are also accessible via the Purchasing Department website:

<http://cms.springbranchisd.com/skin2/Purchasing/tabid/16019/Default.aspx>

The bid/proposal document serves as notification or announcement of a competitive opportunity. The bid will reference the name, date, and time that the bid/proposal is due.

NOTE: Bids/proposals may NOT be submitted via fax or electronically at this time, unless instructed otherwise by SBISD.

Invitation to Bid documents will be posted on SBISD website in sufficient time as to permit full and free competition. Specifications, restrictions, and conditions that have the effect of limiting bidding will be avoided.

Bid or Proposal documents contain:

- The item or service to be purchased with specifications
- The quantity to be purchased
- Any installation, maintenance, or repair services to be provided with the item
- The name and location to which delivery is to be made
- The date or dates of delivery
- Date, time, and place of bid opening
- The right of the Board of Trustees to reject any and/or all bids and to accept the bid which appears to be in the best interest of the District
- Any other terms and conditions as stated in the bid/CSP

Each vendor has an opportunity to respond to the items or services requested or to return the "No Bid Notification" page, which allows the vendor to remain on the District's active vendor list.

Advertising of Bids

As required by state law, Spring Branch Independent School District publishes notification of when and where bids will be opened in a county newspaper (*Houston Chronicle*) once a week for at least two separate weeks prior to the time set for receiving bids, proposals, or responses.

The advertisement includes the following information:

- **Type of commodity, equipment, or service requested**
- **Contact phone number and address for information on bid invitation**
- **Bid number**
- **Date, time, and place of bid opening**

Education Code 44.031(g)

Submission of Bids

Bids **MUST** be submitted to the Purchasing Department on the bid document furnished by the Purchasing Department.

NOTICE: Often times, an addendum or change in the bid specifications is released before vendor bids/proposals are accepted. These documents, if released, will be posted on the Purchasing Department's Bids and Proposals webpage. The SBISD Purchasing Department will **NOT** be responsible for the rejection of a vendor's bid/proposal for failure to follow instructions contained in an addendum and/or if incomplete or inaccurate information is supplied by the vendor. Additionally, changed or modified specifications will be rejected.

All bids must be submitted in a sealed envelope/box, unless instructed otherwise by SBISD, to:

**Director of Purchasing and Contracts
1031 Witte Road, Building T-1A
Houston, TX 77055-6016**

Bids may **NOT** be submitted via fax or electronically at this time, unless instructed otherwise by SBISD.

Bidder's Checklist

It is critical that bids are completed in every detail. Review the following checklist prior to bid submittal.

- Has the bid been completely filled out on the Spring Branch ISD bid form?
- Has the unit price been filled in?
- Has the extension been calculated?
- Have you included the description of the item bidding?
- Has the delivery time been noted?
- Have you provided warranty information?
- If product, commodity, or equipment deviates from the specifications or Design Guide, have you listed the deviations?
- If descriptive literature has been requested, has it been attached to the bid form?
- Has the bid been signed?
- Has the bid been submitted in a sealed envelope/box?
- Have you completed the requested identification data on the front of the bid envelope and the bid form page of the bid document?
- Has the Conflict of Interest document been completed?

Failure to complete any of the requested items may result in bid disqualification.

Bid Opening Procedures

All bid openings are open to the public at the date and time specified in each document. The bid opening will be conducted by the Director of Purchasing & Contracts or designated representative.

Bidders or other interested persons are invited to be present at bid openings. Any bid may be withdrawn prior to the scheduled time for opening. A bid that has been opened may not be changed for the purpose of correcting an error in the bid price. Bids received after the specified date and time will not be considered and will be returned to the vendor unopened.

Local Government Code 271.026

The Board shall have the right to reject any and/or all bids.

Local Government Code 271.027(a)

Sealed bids will be tabulated for comparison purposes. The public may record any information read aloud at the public bid opening. After bids are read and tabulated, the bids will then go into an evaluation stage until an award is made by the Board of Trustees.

In awarding a contract, the District shall consider:

1. Purchase price
2. The reputation of the vendor and of the vendor's goods and services
3. The quality of the vendor's goods or services
4. The extent to which the goods or services meet the District's needs
5. The vendor's past relationship with the District
6. The impact on the ability of the District to comply with laws and rules relating to historically underutilized businesses
7. The total long-term cost to the District to acquire the vendor's goods or services
8. Whether the vendor or the vendor's ultimate parent company or majority owner has its principal place of business in this state; or employs at least 500 persons in this state
9. Any other relevant factor specifically listed in the request for bids or proposals

Education Code 44.031(b)

House Bill 1295 – Certificate of Interested Parties

Spring Branch ISD is required to comply with House Bill 1295, which amended the Texas Government Code by adding Section 2252.908, Disclosure of Interested Parties. Section 2252.908 prohibits SBISD from entering into a Board approved contract with a business entity unless the business entity submits a Disclosure of Interested Parties (Form 1295) to the District at the time business entity submits the signed contract.

"Interested Party" means a person:

- a) Who has a controlling interest in a business entity with whom SBISD contracts; or
- b) Who actively participates in facilitating the contract or negotiating the terms of the contract, including a broker, intermediary, adviser, or attorney for the business entity.

"Business Entity" means an entity recognized by law through which business is conducted, including a sole proprietorship, partnership, or corporation.

As a "business entity," all vendors must electronically complete, print, sign, notarize, and submit Form 1295 with their proposals even if no interested parties exist.

Proposers must file Form 1295 electronically with the Texas Ethics Commission using the online filing application, which can be found at:

https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm

Proposers must use the filing application on the Texas Ethics Commission's website to enter the required information on Form 1295. Proposers must print a copy of the completed form, which will include a certification of filing containing a unique certification number. The Form 1295 must be signed by an authorized agent of the business entity, and the form must be notarized.

The completed Form 1295 with the certification of filing must be filed with SBISD by attaching the completed form to the vendor's solicitation response.

SBISD must acknowledge the receipt of the filed Form 1295 by notifying the Texas Ethics Commission of the receipt of the filed Form 1295 no later than the 30th day after the date the contract binds all parties to the contract. After SBISD acknowledges the Form 1295, the Texas Ethics Commission will post the completed Form 1295 to its website within seven business days after receiving notice from SBISD.

Conflict of Interest Disclosure Statement

Effective January 1, 2006, any person or entity who contracts or seeks to contract with SBISD for the sale or purchase of property, goods, or services (as well as agents of such persons) (hereafter referred to as Vendors) is required to file a Conflict of Interest Questionnaire with the District. Each covered person or entity who seeks to or who contracts with SBISD is responsible for complying with any applicable disclosure requirements. SBISD will post the completed questionnaires on its website.

Local Government Code 176

The Conflict of Interest Questionnaire may be downloaded from the SBISD website at:

<http://cms.springbranchisd.com/LinkClick.aspx?fileticket=PcWzux9HLmo%3d&tabid=29597>

Completed forms should be sent to:

**SBISD Purchasing Department
1031 Witte Road, Building T-1A
Houston, TX 77055-6016**

Current Bids and Proposals

[Excerpt from

<http://cms.springbranchisd.com/skin2/Home/Departments/IS/Purchasing/BidsandProposals/tabid/24436/Default.aspx>]

NOTICE: Often times, an addendum or change in the bid specifications is released before vendor bids/proposals are accepted. These documents, if released, will be posted on the Purchasing Department's Bids and Proposals webpage. The SBISD Purchasing Department will **NOT** be responsible for the rejection of a vendor's bid/proposal for failure to follow instructions contained in an addendum and/or if incomplete or inaccurate information is supplied by the vendor. Additionally, changed or modified specifications will be rejected.

Click on the contract number to view and/or download a copy of bid/proposal and/or addenda. Only complete bids/proposals on file in Purchasing Department are listed for download. Construction bid/proposal documents can be obtained from the locations listed in the Notice to Bidders/Proposers posted here.

Current Bids/Proposals	Bid/Proposal Downloads & Addenda	Opening Date	Time
Request for Qualifications for CM at Risk for Valley Oaks Elementary School RFQ 9570Q Qualifications due: 11/29/12 @ 2:00 PM	9570Q	11/29/12	2:00 PM
Annual Contract for Charter Bus Transportation Services (Re-Bid) 9612P Proposal Due: 11/27/12 @ 2:00 PM	Addendum 1 9612P	11/27/12	2:00 PM
Annual Contract for Internet Services #9600P Pre-Proposal Conference: 10/30/12 @ 10:00 AM 1031 Witte Rd., Building "E", 2 nd Floor, Houston, Texas 77055 Proposal Due: 11/27/2012 @ 2:00 PM	Addendum 1 9600P	11/27/12	2:00 PM

All bids/proposals must be submitted in a sealed envelope/box, unless instructed otherwise by SBISD.

Tax Exemption

Spring Branch Independent School District is exempt from payment of taxes under *Chapter 20, Title 122A, Article 20.04, Revised Civil Statutes of Texas*, for the purchase of tangible personal property. The Texas Sales Tax Exemption Certificate may be requested from the Purchasing Department at 713-251-1100.

Processing Vendor Payments

Payment for purchased goods or services is initiated only after goods have been received or services rendered.

Invoices are submitted to the Accounts Payable Department where they are matched with a copy of the purchase order; therefore, it is essential for the purchase order number to appear on the invoice for verification of delivery and approval for payment. Upon receipt by the Accounts Payable Office, the invoice will be processed for payment within thirty (30) days of its receipt if services are complete. **Electronic invoices can be sent to accountspayable@springbranchisd.com.**

Vendors may select one of the following methods by which SBISD will process payments:

- CARD (Ghost Card)—SBISD's preferred method of payment
- Automatic Clearing House (ACH)—Electronic Fund Transfer to vendor's bank account

For inquiries regarding the methods of payments, email accountspayable@springbranchisd.com.

Vendor Delivery Responsibilities

Failure to meet delivery dates specified in bid documents may be a factor in subsequent award determinations. It is the responsibility of the supplier to notify the appropriate campus/department when a delay in delivery is anticipated or occurs. Information of a new anticipated delivery date and the reason for the delay should also be given.

Gifts and Gratuities

School district officials and employees cannot accept anything of value from a vendor, such as personal gifts or gratuities. Although such practices are legitimate and generally accepted in the private sector, there is substantial possibility that both giving and receiving of such "hospitality" constitutes a Class A misdemeanor offense of "Gift to a Public Servant" if the recipient is a government employee who exercises some influence in the purchasing process of the governmental body.

SBISD Purchasing Department



How To Do Business with Spring Branch ISD

1031 Witte Road, Building T-1A
Houston, TX 77055
Phone: 713-251-1100
Fax: 713-251-1115
Email: Purchasing@springbranchisd.com