



2024-2025

Boerne ISD

**Child Nutrition Food Services
Department**

PROCUREMENT PROCEDURES MANUAL

Eddie Ashley- Director of Purchasing

Shanna Bergmann- BISD Buyer

Vlada Buck- BISD CN Liaison

This Procurement Procedures Manual (2 CFR 200.318) has been created to ensure that all purchases made with the Child Nutrition (CN) Federal Funds are in compliance as regulated by all Federal, State, and Local written policy.

Revised
7/11/2024

This manual is a “living document” that is updated before the start of each new school year and as necessary. The last page contains a list of all updates and “endnotes” for all edits, updates, deletions, and additions, which includes the date of each entry.

Overview of Procurement

Boerne ISD uses the following resources for all Child Nutrition procurement methods:

United States Department of Agriculture’s (USDA) 2 CFR part 200.318-327

Texas Department of Agriculture’s (TDA) “Administrator’s Reference Manual,” Sections 16, 17ⁱ, 17a, 17b, and 17c.ⁱⁱ

The following standards will be applied to all procurement methods. Solicitations will...:

- Allow for “full and open” competition.
- Be handled with integrity and fairness to all potential bidders.
- Award responsive and responsible contractors
- Be fully documented to allow for complete transparency and follow the 5-year record retention requirement

Boerne ISD allows the Child Nutrition Department to participate in the following:

Agreements

1. Inter-governmental agreements (operator-only/ESC)
2. Third Party Cooperatives
3. Agents

Informal Purchases

1. Micro-Purchase: any purchase that does not exceed the State self-certification threshold of \$50,000.
2. Small Purchase Acquisition: any purchase that exceeds \$10,000 but is not greater than the State threshold of \$50,000.
3. Boerne ISD does not have a more restrictive Small Purchase threshold.

Formal Purchases

1. Competitive Bid (IFB-Invitation For Bid)
2. Competitive Proposal (RFP-Request For Proposal)
3. Non-Competitive Proposal. TDA “pre-award approval” required.

Other Purchases

1. Sole Source – determined by district based on the following:
 - a. Failed procurement method due to no competition
 - b. Point of Sale Software, based on proprietary computer coding.
 - c. Warranty void risk due to proprietary chemicals used on equipment.
 - d. Requires TDA approval prior to awarding the vendor or purchasing from the vendor.

2. Capital Expenditures – any single piece of equipment that exceeds \$5,000 in cost must be approved by TDA prior to purchase. Cost analysis must be done prior to submitting a request to TDA.

Procurement Phases

Boerne ISD will use the following 4 phases of procurement:

Planning. The following is a list of the first steps that will be taken prior to any purchase.

(BISD CN Liaison in conjunction with the Director of Purchasing)

1. What is needed in the way of product/products and/or services?
2. When are the products or services needed?
3. What is an estimated cost of the products or services needed? Multiple resources will be used to determine an “estimate” of the value or cost. The cost/price analysis will be used to determine the most appropriate procurement method.
4. How the products and/or services will be paid for?
5. Has BISD obtained TDA approval through TX-UNPS for Capital Asset purchases for single item purchases with a cost of \$5000 or greater?

Forecasting. Below is a list of the resources to be used for forecasting our needs.

(BISD CN Liaison in conjunction with the Director of Purchasing)

1. We will review our past program to determine if the products or services were used in the previous program year.
2. Current program needs will be assessed and product amounts and/or service needs will be determined.
3. Upcoming program years will be considered in regard to future needs and possible renewal or extensions of contracts if necessary.
4. A Cost Analysis will be done to determine most appropriate procurement method and review of increases or decreases to upcoming school year’s budget. The cost analysis will be completed prior to releasing any solicitations.

Soliciting. The following general steps will be taken to start the solicitation process. Each procurement method is more specifically outlined later in this manual.

(Director of Purchasing)

1. Based on the cost/price analysis in our forecasting phase, the most appropriate procurement method will be used.
2. A general specification with details will be written to document the product or service needed.
3. Terms and conditions of the contract will be outlined and reviewed to ensure the solicitation clearly describes our needs and deliverables required.
4. Each solicitation will include the following information:

To ensure procurement integrity, Boerne ISD will not seek guidance from 3rd party contractors who could potentially be submit a quote or proposal for products and/or services.

- I. Deadline (date and time) the quotes or responses are to be received.
- II. The method of receiving quotes and/ or responses to be submitted and to whom.
- III. Evaluation criteria, if any is used, clearly outlined to include scoring rubric.
- IV. Date and time by which the solicitation will be awarded.
- V. Term and Conditions of the contract and if any renewals or extensions will be allowed.
- VI. All USDA Federal and State-required certifications and affidavits if applicable to the procurement method used.
 - a. Research will be done to identify potential suppliers.

Awarding. Based on the procurement method, the following general processes will be used:

(Chief Operations Officer, BISD CN Laison, & Director of Purchasing)

1. A winner will be selected using the following methods.
 - a. Equitable distribution for all true Micro-Purchases.
 - b. Low bid winner for Small Purchases and IFB's.
 - c. A single, multiple, and/or back-up winner through evaluation criteria for Small Purchases and RFP's.
 - d. Pre-award approvals must be obtained from TDA for any solicitation that is deemed non-competitive or sole source.
 - e. Multiple winners are selected for RFP's when a "line-item" award approach is taken to procure the best price for each product specified in the solicitation.

Contract Management. The following items will be monitored during the life of an awarded contract by the child nutrition department to ensure compliancy.

(Chief Operations Officer and BISD CN Laison)

1. Use of our Child Nutrition Federal Funds is compliant with all Federal, State, and local regulations.
2. That all specifications, technical requirements, and terms and conditions of all contracts are executed correctly.
3. That we are not charged for duplicative services.
4. Quantities specified are made available and delivered.
5. Delivery times and schedules are being met per contract terms.
6. Product deliveries and/or services are occurring at the correct location if multiple locations are part of the awarded contract.
7. Products and/or services are meeting the specifications as described in the solicitation.
8. Substitutions of products are being handled as outlined in the Terms and Conditions and are adequate to the specified product.

- a. Contracts require a notification 72-hours prior to delivery to confirm that substituted product is comparable and acceptable.
9. Vendor response time to product or service issues is appropriate in regard to each situation, if any.
10. Pricing received on invoices is checked against awarded bid pricing to ensure accuracy and correctness.
 - a. If incorrect pricing is charged, the vendor will be contacted to rectify the pricing and provide a credit.
 - b. If incorrect pricing is charged on a coop-procured bid, the Vendor and the coop Program Coordinator will be notified and follow up required to ensure a credit is given.
11. Damaged or spoiled product will be identified at time of delivery and immediately rejected. Invoice will be noted and signed by the driver. Proper follow up will be done to ensure a credit is issued.
12. Items ordered and appearing on the invoice but not included in the delivery will be noted on the invoice and require driver signature or initials. Vendor is required to "hot shot" the missing products or proper substitutions within a 24-hour period from time of original delivery.
 - a. If vendor cannot "hot shot" the products, proper credit will be requested.
 - l. If the contract was procured by our coop, we will follow all above steps for managing the contract along with notifying our coop Program Coordinator of all issues with each awarded vendor.
13. Material Change- Boerne ISD will monitor each product and/or service to be purchased is in accordance with the description outlined in the solicitation and the contract to ensure a material change does not occur. BISD understands a material change can result in unallowable costs. A material change may occur if BISD purchases additional products and/or services beyond the quantity expressed in the solicitation and contract.

Procurement Methods

Informal Procurement Methods (2 CFR 200.320); ARM Section 17

Boerne ISD will follow the below steps with each informal procurement method.

(Director of Purchasing, Chief Operations Officer, BISD CN Liaison)

Micro-Purchases

Micro-purchases are not intended to be the primary method of procurement. According to TDA, CEs are expected to forecast purchases to determine the appropriate procurement method, especially for products and services typically procured via the micro-purchase method multiple times throughout the year. TDA will review overall purchases by product and vendor to identify trends, including whether inadequate forecasting led to multiple micro-purchases of the same type of products and services or from the same vendors. If Boerne ISD is routinely using the micro-purchase method for the same items, the CE must maintain documentation that demonstrates why this is the most suitable method for purchasing and why another method is not possible or reasonable. For micro-purchasing, aggregate purchase amount is the total cost of the same category of products and services purchased over Boerne ISD's fiscal year. As such, the cost of the same category of products or services purchased using the micro-purchase method is cumulative across the fiscal year and cannot exceed the \$50,000 threshold (BISD Self-Certification Approved by TDA for 2023-2024 SY). Boerne ISD will identify categories of purchases and apply the micro-purchase threshold to all products and services purchased in the same category.

Boerne ISD will distribute equally all Micro Purchases among all eligible vendors and will not apply a local or State regulation that limits the distribution of purchases to one vendor.

Boerne ISD will apply the following regulations and processes to all Micro Purchases:

1. All unplanned, non-routine or routine purchases with an aggregate total or annual aggregate total if similar categorical products that do not exceed the threshold of \$50,000 are allowed (2 CFR 200.67) and will include:
 - a. Documentation that explains the reason for the purchase and vendor name.
 - b. List of items or service purchased.
 - c. Receipt.
 - d. All documentation will be kept in a file labeled "Micro-Purchases." (BISD CN Liaison)
2. Types of Micro-Purchases allowed, but not limited to:
 - a. Emergency and/or equipment repair parts; unless the aggregate of the repairs exceeds the Micro-Purchase threshold at which point a small purchase or formal method should occur.
 - i. Boerne ISD will review previous year costs and future costs to determine if this type of purchase qualifies for Micro Purchase.
 - b. Small to medium catering events
 - c. Emergency food shortages
 - d. Staff training and travel expenses

- e. Small kitchen equipment purchases
- f. One-off/one-time purchase of a product or products
- 3. The following employee positions have permission to authorize a Micro-Purchase:
 - a. Chief Operations Officer
 - b. BISD Assistant CN Director
 - c. Director of Purchasing
- 4. Eligible vendors.
 - a. Equitable distribution of purchases will be made to all suppliers within an appropriate proximity to the district's school sites.
 - b. District-approved and qualified suppliers
- 5. Interested Vendors
 - a. Boerne ISD will ensure that any vendor with an interest in becoming "awarded" is provided with all the necessary information and assistance if needed to become "awarded."
 - b. Boerne ISD has a list of awarded vendors posted on the purchasing page of the Boerne ISD website.
- 6. Cost Reasonable and Payment for Micro-Purchases. (BISD CN Laison)
 - a. The cost must not exceed an amount incurred by a prudent person under similar circumstances.
 - b. Boerne ISD will do a cost comparison to ensure the price is reasonable.
- 7. Boerne ISD allows the following payment types for Micro Purchases: (BISD CN Laison)
 - a. Purchase Order
 - b. District Citibank Card

Small Purchases

The small purchase method is an "Informal Procurement Method" where the cost of the same category of products and services purchased over the CE's fiscal year does not exceed the Small Purchase Acquisition threshold of \$50,000 (or less if district has a more restrictive policy). If the CE is routinely using the small purchase method for the same items, the CE must maintain documentation that demonstrates why the small purchase method is the most suitable method for purchasing these products and/or services and why the use of another procurement method is not possible or reasonable.

The District must contact a minimum of 3 potential suppliers and attempt to get a minimum of 2 quotes.

1. Acquisition Threshold

- a. Based on the determination through a cost/price analysis that a purchase will exceed the Micro-Purchase threshold (2 CFR 200.67) but will not exceed the State's/District's Simplified Purchase Acquisition (Small Purchase) threshold of \$50,000.

2. Allowable Types of Small Purchases:

- a. Single/one-time purchase with an aggregate amount between \$10,000<\$50,000
- b. Multiple purchases of same or similar products and/or services from a prime vendor during the fiscal year with an aggregate amount between \$10,000<\$50,000

3. Boerne ISD will use the following steps to make a Small Purchase (2 CFR 200.320 [b]) (BISD CN Laison and Director of Purchasing)

- a. Identify potential suppliers; who to contact for bids; what is available on the market.
- b. Write the product and/or service specifications to include details but not restrictive as to exclude competition.
- c. Conduct a cost analysis to include all products or services to be purchased along with estimated quantities.
 - i. Current pricing will be used to determine contract value and establish reasonable cost.
- c. Draft the solicitation to include contract terms and conditions, invoice methods, delivery and/or service requirements, duration of contract, and evaluation criteria if any is being used with the scoring rubric.
- d. Contact a minimum of 3 vendors (if possible) and provide each one with the same information to include all details of the solicitation. Emailed or faxed documents is the preferred method, but verbal delivery of solicitation details is allowed.
- e. Document vendor responses to include:
 - i. Vendor name and contact with email address and phone.
 - ii. Contact method.
 - iii. Price quoted to include the date received.
 - iv. Duration of the price quote
 - v. If less than 3 quotes are received, explanation of why this occurred will be included in the documentation.
- f. Award will go to the most responsive and responsible vendor with the lowest price or highest evaluation score if used. A responsive vendor is one whose response conforms to all the material terms and conditions of the solicitation. A responsible vendor is one whose financial, technical, and other resources indicate an ability to perform the services required.
 - i. All documentation will be kept in a file labeled "Small Purchase Acquisitions."
- g. The following employee positions have permission to make a Small Purchase:
 - i. Chief Operations Office
 - ii. Boerne ISD Assistant CN Director
 - iii. Director of Purchasing and BISD Buyer
- h. Eligible vendors.
 - i. All suppliers that have been identified as potential bidders.
 - ii. District-approved and awarded suppliers.
 1. Boerne ISD will ensure that any vendor with an interest in becoming "awarded" is provided with all the necessary information and assistance needed to become "awarded."
- i. Payment for Small Purchases.
 - i. Purchase Order
 - ii. District Citibank Card

Categories for Micro-Purchases and Small Purchase Acquisitions:

Boerne ISD has determined several categories for Micro-Purchases and Small Purchase Acquisitions. The categories have been set up based on historical purchases, current needs, and future needs based on age of equipment and parts, and therefore, represent the different areas that require equipment, equipment parts, or service when needed and are separate in type of products and services.

When a category is used for Micro-Purchases, the total annual aggregate amount may not exceed the \$50,000 threshold.

When a category is used for Small Purchase Acquisitions, the total annual aggregate amount may not exceed the \$50,000 threshold.

The Director of Purchasing will track and manage all Micro-Purchases and Small Purchase Acquisitions to ensure that annual aggregate amounts do not exceed the appropriate purchasing thresholds.

The Director of Purchasing applies a commodity code to identify each category in the accounting system to assist with proper tracking and expenditure amounts.

The categories are as follows:

Commodity Code	Commodity Description	Primary Department	Category
045	Appliances/Equip. Household	All	Appliances
165	Cafeteria & Kitchen Sup./Equip	Food Service	Equipment
285	Elec.Equip/Sups,ExceptWire/cab	Operations	Electrical
287	Elec. Equip.,Parts,Accs.,comp.	Operations	Electrical
320	Fasteners:Bolts,nut,screws,Etc	Operations	Maintenance
365	FloorMaint.Machines,Parts/Accs	Operations	Maintenance
393	Foods: Grocer's Mis. Items	All	Food
485	Janitorial Sup., General Line	Operations	Custodial
640	Paper&Plastic Prod. Disposable	Food Service	Products
645	Paper, Card Stock, Etc.	All	Office Supplies
670	Plumbing Equip., Fixtures,Sup.	Operations	Plumbing
917	Contracted Services	All	Contracted Svcs
936	Equip.Maint.&Rep.Serv.:GenEqui	Operations	Maintenance
045-20	Coffee Makers	All	Appliances
045-24	Dishwasher	All	Appliances
045-52	Oven, Microwave	All	Appliances
045-66	Refrigerators and Freezers	All	Appliances
045-94	Washers and Dryers	All	Appliances
165-02	Blender,FoodCutter,Mixer,Proc	Food Service	Equipment
165-07	Cafe & Kitchen Equip.	Food Service	Equipment
165-10	Can Openers & Knife Sharpeners	Food Service	Equipment
165-12	Can Openers, Manual	Food Service	Equipment
165-14	Kitchen Cleaner/Sanitizer	Food Service	Cleaner

165-15	Coffee Makers/Hot Water Disp.	Food Service	Equipment
165-18	Compactors,Trash, Café Type	Food Service	Equipment
165-29	Dishwasher, Commercial	Food Service	Equipment
165-34	Dispenser: All Types	Food Service	Equipment
165-41	Filters for Vent Hoods	Food Service	Equipment
165-44	Food Containers, Stainless,Vacuum Type	Food Service	Equipment
165-45	Food Container,Storage	Food Service	Equipment
165-47	Food Carts & Cafe Serving Unit	Food Service	Equipment
165-48	Hot & Cold Pass Through Units	Food Service	Equipment
165-52	Ice Equip Carts, Scoops, tongs	Food Service	Equipment
165-54	Ingredient Storage Bins	Food Service	Equipment
165-57	Menu Boards	Food Service	Equipment
165-59	Napkin Holders	Food Service	Equipment
165-60	Ovens, Micro, Conv. commercial	Food Service	Equipment
165-68	Racks: Cups, Glass, tray	Food Service	Equipment
165-69	Racks: Dispensing, Food Service	Food Service	Equipment
165-70	Racks: Utensil and Pastry	Food Service	Equipment
165-73	Ranges, Griddles, Hot Plates, Warmers	Food Service	Equipment
165-77	Sieves & Strainers	Food Service	Equipment
165-80	Slicers & Shredders	Food Service	Equipment
165-88	Storage Shelves	Food Service	Equipment
165-91	Toasters	Food Service	Equipment
165-94	Vent Hoods & Exhaust Systems	Food Service	Equipment
200-92	Work Clothes/Uniforms-Operations	Operations	Uniforms
240-24	Cookware, Pots & Pans	Food Service	Equipment
240-28	Cutlery:Knives,spatulas,steels	Food Service	Equipment
240-35	Cutting Boards	Food Service	Equipment
240-63	Kitchen Utensils, small	Food Service	Equipment
340-00	Fire Protection Equip/Sup.	Operations	Safety/Fire
340-20	Fire Detecting Equipment & Services	Operations	Safety/Fire
345-00	First Aid & Safety Equip.	All	Medical
385-96	Vegetables, Frozen	All	Food
390-28	Fruits, Fresh	All	Food
390-33	Trays: Deli, Veg. Dessert	All	Food
390-71	Sandwiches, Ready Made	All	Food
390-84	Vegetables, Fresh	All	Food
390-91	Water, Bottled	All	Food
405-06	Propane & Butane	Transportation	Fuel
420-08	Cafe Furniture	All	Furniture
640-22	Containers paper/plastic	Food Service	Products
640-50	Paper Prod:cups,napkins,plates	Food Service	Products

640-60	Plastic & Styrofoam Products	Food Service	Products
640-80	Wax Paper, Alum Foil, cellopha	Food Service	Products
740-13	Cold Storage Vault, Walk in freezer	Food Service	Equipment
740-17	Compressors, Parts & Access.	Food Service	Equipment
740-24	Condensing Units	Food Service	Equipment
740-30	Display cases; Refrigeration	Operations	HVAC
740-45	Ice making/dispensing machines	Operations	Refrigeration
740-55	Refrigerant Gases	Operations	Refrigeration
740-59	Refrigeration Acces & Supplies	Operations	Refrigeration
740-66	Refrig.unit vault/walk in	Operations	Refrigeration
740-70	Refrigerator&Freezer, Commer	Operations	Refrigeration

Formal Procurement Methods (2 CFR 200.320); ARM Section 17

(Director of Purchasing, Chief Operations Officer, BISD CN Liaison)

Capital Expenditures

Texas Department of Agriculture (TDA) requires a CE to get pre-approval through TX-UNPS on expenditures for food service equipment or alterations to equipment, only if the total equipment “per unit” cost is greater than \$5,000.

1. Boerne ISD, BISD CN Liaison, will submit a request for approval prior to purchasing the item via a JOT form to TDA including:
 - a. District Name, CE ID, and contact information (phone and email address)
 - b. Description of the equipment, including the purpose and how it supports the operation or maintenance of the District.
 - c. Provide an estimated cost and whether or not we have sought bid pricing.
 - d. Describe how the old equipment (if any) will be disposed of and acknowledge that any proceeds from the disposal will be used to offset the cost of the replacement.
 - e. Acknowledge that any equipment purchased will be used exclusively (100%) by the District.

Competitive Sealed Bidding (IFB – Invitation For Bid).

The competitive sealed bidding method is a “Formal Procurement Method” that is used when the contract value is at or above the Small Purchase threshold, which is \$50,000 in the state of Texas. The formal procurement method requires a District to post a public advertisement in a newspaper of general circulation for two consecutive weeks upon release of the solicitation. It is recommended that the District post the advertisement on their website or a trade website as well as email or make phone calls as a means of advertising to potential bidders. State and federal regulations mandate that the offers be opened publicly, so possible contractors and other interested parties are able to attend.

1. **Boerne ISD will ensure the following conditions when preparing an IFB:**
 - a. A complete, adequate, and realistic specification or purchase description will be made available.
 - b. The procurement lends itself to a firm fixed price contract and the selection of the successful bidder can be made principally on the basis of price.
 - c. Evaluation criteria will be included in the solicitation in regards to determining a winner if the same price has been received from 2 or more different vendors.
2. **Boerne ISD will adhere to the following requirements in Soliciting and Evaluating an IFB:**
 - a. Conduct a cost analysis to include all products or services to be purchased along with estimated quantities. (Director of Purchasing and BISD CN Liaison)
 1. Current pricing will be used to determine contract value and cost reasonable.
 - b. The solicitation will be publicly advertised.
 - c. Provide detailed information such as response time, date and time responses are to be received, how responses must be submitted, date and time of public opening, and any other pertinent details.
 - d. Provide product and/or service specifications that allow multiple responses.

- e. Award the contract to the most responsive and responsible bidder. Factors such as discounts, transportation cost, and life cycle costs shall be considered in determining which bid is lowest.
 - f. Any or all bids may be rejected if there is a sound documented reason.
- 3. The following employee positions will participate in the IFB Procurement Method:**
- a. Chief Operations Officer
 - b. BISD Assistant CN Director
 - c. Director of Purchasing and BISD Buyer
- 4. The following duties will be performed by any or all assigned to evaluate the IFB:**
- a. Write product or service specifications. (BISD CN Laison)
 - b. Write the solicitation document. (Director of Purchasing)
 - c. Send the IFB to potential suppliers. (BISD CN Laison and Director of Purchasing)
 - d. Participate in the opening of the submitted bid quotes and determine a winner. (BISD CN Laison and Director of Purchasing)
- 5. Eligible Vendors**
- a. All suppliers that have been identified as potential bidders.
 - b. Only district-approved and qualified suppliers
 - i. CE will ensure that any vendor with an interest in being “awarded” is provided with the details of how to become awarded and has a fair opportunity.
- 6. Payment for IFB Purchases**
- a. PO to be created prior to the invoice payment.

Competitive Proposals (RFP – Request For Proposal)

A request for proposal is a “Formal Procurement Method” used for purchases when an IFB is not appropriate. An RFP describes in a general way what is needed and requests that vendors submit a proposal for servicing the needs of the district. RFP’s can be used for either goods or services and require the prospective vendor to submit a technical proposal that explains how they will meet the objectives of the solicitation document and a cost element that identifies the costs to accomplish their proposal. Price is to remain the major consideration but can be one of many evaluation factors used to determine the most advantageous winner. The RFP also allows for negotiation as a means to obtain the best value or price.

- 1. Boerne ISD will ensure the following conditions when preparing an RFP:**
- a. A complete, adequate, and realistic specification or purchase description will be made available.
 - b. The procurement lends itself to a firm fixed price contract or cost reimbursable price.
 - c. The selection of the successful bidder will be made after an evaluation of criteria with price being the “heaviest weighted factor.”
 - d. Negotiation of price or best value will be handled with complete fairness and integrity.
- 7. Boerne ISD will adhere to the following requirements in Soliciting and Evaluating an RFP:**
- a. Conduct a cost analysis to include all products or services to be purchased along with estimated quantities. (BISD CN Laison and Director of Purchasing)
 - i. Current pricing will be used to determine contract value and cost reasonable.

- b. The solicitation will be publicly advertised.
 - c. Solicitation document will include a cover sheet with the RFP description, contact information, issue date, closing date and opening date.
 - d. Written instructions and bidder information sheet to be completed by the proposer.
 - e. Clear product and/or service specifications
 - f. Clear description of district demographics and product usage (as relevant)
 - g. Clearly stated evaluation criteria to include scoring rubric.
 - h. Standard and/or Special Terms and Conditions of the contract
 - i. Discounts, Rebates, and/or credits provisions where applicable
 - j. Utilize questionnaires as appropriate.
 - k. Reference Sheet
 - l. Certifications per ARM Section 17 and Appendix II to Part 200 of 2 CFR 200:
- 2. Awarding of the contract:**
- a. Evaluation will consist of product quality, services, or past performance, but not limited to, along with price as the heaviest weighted factor.
 - b. Cost plus percentage of cost will not be allowed as a basis for award (2 CFR 200.320)
 - c. Any or all bids may be rejected if there is a sound documented reason.
3. The following employee positions will participate in the RFP Procurement Method:
- a. Chief Operations Officer
 - b. CN Assistant Director
 - c. Directory of Purchasing and BISD Buyer
- 4. The following duties will be performed by any or all assigned to evaluate the RFP:**
- a. Write product or service specifications. (CN Department)
 - b. Write the solicitation document. (Purchasing Department)
 - c. Send the RFP to potential suppliers. (CN and Purchasing Department)
 - i. Participate in the opening of the submitted bid quotes and determine a winner. (CN and Purchasing Department)
5. Eligible vendors.
- a. All suppliers that have been identified as potential bidders.
 - b. Only district-approved and qualified suppliers.
6. Payment for RFP Purchases.
- PO to be created prior to the invoice payment.

Non-Competitive Negotiation and Sole Source Procurements

These types of procurement methods are used to compensate for the lack of competition. This lack of competition may result from overly restrictive solicitation documents, an inadequate number of suppliers in the area or the procurement environment may have been compromised by inappropriate supplier actions (i.e. market allocation schemes). Non-competitive negotiation occurs after the solicitation (sealed bid, competitive negotiation or small purchase) has been issued, but competition on that solicitation has been deemed inadequate.

Non-competitive negotiations or sole source procurements are restricted to specific situations and may only be used when:

1. Inadequate competition in a formal procurement method

- a. Boerne ISD will follow through with the following procedures when a single quote or bid response is received:
 - I. Research the reasons for a single response
 - II. To the best ability possible, determine if the bid was too restrictive or released in a way that prevented open and fair competition.
 - III. Determine if Sole Source approval is needed.
- b. **Determining if the Products or Services Solicited Qualify as a “Sole Source.”**
 1. The solicitation was adequate and allowed for open and fair competition.
 2. The single responder is a responsive and responsible bidder.
 3. The product or services are only available from one the single supplier.
 4. If a single bidder qualifies as a “sole source,” the process for pre-award approval will be followed.
- c. **Sole Source Pre-Award Process**
 1. Boerne ISD will document all bidding activities and submit the “Noncompetitive Procurement Request Form” found on the squaremeals.org website. (Purchasing Department)
 2. Boerne ISD will wait to receive the approval to award a sole source vendor from TDA.
 3. Boerne ISD will award the sole source bidder with approval.

2. Public emergency exists

- a. Boerne ISD will obtain TDA’s approval prior to award and purchase of products or services. All requests for approval must be submitted through the State Agency’s online system, TX-UNPS.

3. The following employee positions will oversee the approval process for a Non-Competitive and/or Sole Source Procurement Method:

- a. Chief Operations Office
- b. BISD CN Assistant Director
- c. Director of Purchasing and BISD Buyer

To jump to a specific standard hold down the CTRL key and click the link.

- [Bid Protest and Dispute Resolution Procedures](#)
- [Buy American Provision](#)
- [Cooperative Membership and Procurement](#)
- [Cost Analysis](#)
- [Discounts, Rebates, and Credits](#)
- [Economic Price Adjustments in Vendor Contracts](#)
- [Geographic Preferences](#)
- [Local Sourced Products: Farm to School Initiative](#)
- [Recalls](#)

- [Small and Minority Businesses, Women Business Enterprises, and Labor Surplus Area Firms and/or Disabled Veteran Business Enterprise \(MWDVBE\)](#)
- [Unnecessary or Duplication of Goods/Services](#)
- [Use of Excess and Surplus Property](#)
- [Appendix of Certifications](#)

Bid Protest & Dispute Resolution Procedures

(Director of Purchasing)

Any interested party may protest any of the following situations:

- a. Solicitation or other request for offers for a contract for the procurement of property or services.
- b. Cancellation of a solicitation or other request
- c. Award or proposed award of a contract
- d. Termination of a contract, if the protest alleges that the termination was based on improprieties in the administration of the contract.
- e. Any Dispute not previously listed will follow Board Policy GF (Local)

Boerne ISD will do the following for every bid:

- a. Include clear instructions in each solicitation document about questions and protest procedures.
- b. Boerne ISD will allow respondents to request clarification of information prior to the close of the bid/proposal.
- c. Notify bidders that protest requests must be received a minimum of 3 business days prior to the close of the bid/proposal.

Boerne ISD will do the following in response to bid protests:

- a. Boerne ISD will address all respondent protests within 24 hours of the bid award.
- b. Follow all written procedures to resolve protests.
- c. Boerne ISD will provide evaluation scores and pricing at the request of the respondent. Violations of law should be referred to the local, state, or Federal authority. (2 CFR, Section 200.318[k])
- d. Notify TDA when a protest is received.
- e. Retain all documentation related to a protest.
- f. Boerne ISD will address the request for additional information as an addendum to all respondents, and
- g. Ensure that all protests are addressed.

Economic Price Adjustments in Vendor Contracts

(Director of Purchasing)

The economic price adjustments, which allow a District to adjust costs in the contract, must be tied to an appropriate standard or cost index. Relating the price adjustments in a contract to an index allows the District to ensure that increases under the contract are not without basis. For example, if fuel prices are increasing drastically, an appropriate index such as the Consumer Price Index (CPI) will reflect this change.

This index is preferred because the USDA uses this index for the National School Lunch Program (NSLP) yearly funding increases. The intention is that if the USDA increased funding by a certain percentage the District would be able to allow the increase in food cost to rise at the same percentage. Vendors will be able to bid on multi-year contracts that allow for inflation and the District will be able to maintain a consistent level of service and food cost percentage from year to year.

Applying Geographic Preferences in Procurement

(BISD CN Liaison)

As amended, the National School Lunch Act (NSLA) allows SFA's receiving funds through the CN Programs to apply a geographic preference when procuring unprocessed, locally grown or locally raised agricultural products. This applies to operators of all of the School Lunch Programs.

Boerne ISD will apply geographic preference to the procurement of agricultural products that:

1. Are unprocessed and retain their inherent character.
2. Are locally grown or locally raised.
3. Have not been cooked, seasoned, canned, or combined with any other products.

USDA allows the entity to define local as long as it is not too restrictive. TDA allows the CE to define local as a boundary or area, such as counties, State, or multi-State as long as it is not too restrictive. Regulation prevents Boerne ISD from awarding any contract based solely on "local," and Boerne ISD will provide clear instructions and information in each solicitation as to our definition of local and evaluation criteria. Boerne ISD will adhere to the policy of using their USDA Federal Funds in the most efficient way possible.

Boerne ISD determines local as "within the United States territory and a distance of 100 miles from the Districts' Central Office" (mileage may vary for items dependent on bidding preference).

Discounts, Rebates, and Credits

Boerne ISD requires that all discounts, rebates, and credits accrue back to the school nutrition account. The contractor will be required to identify the amount of each discount, rebate, or other applicable credit on bills and invoices presented to the Boerne ISD. Contractors will be required to identify the method by which they will report discounts, rebates, and credits. All discounts, rebates, and credits will be tracked via monthly invoices or annual velocity reports. Contractors will be required to maintain

documentation of costs, discounts, rebates, and credits and make those available to Boerne ISD upon request. (BISD CN Liaison)

Buy American Provision

Boerne ISD adheres to the Buy American Provision (7 CFR 210.21) when purchasing commercial food products to be served in the district's SNP meals. This provision will be included in all solicitations for food to be used in the school nutrition programs.

Per Section 104(d) of the William F. Goodling Child Nutrition Reauthorization Act of 1998 {Public Law 105-336} added a provision, Section 12(n) to the NSLA (42 USC 1760(n)), requiring School Food Authorities (SFA's) to purchase, to the maximum extent practicable, domestic commodity or product. Section 12(n) of the NSLA defines "domestic commodity or product" as an agricultural commodity that is produced in the United States and a food product that is processed in the United States using substantial agricultural commodities that are produced in the United States. Substantial" means that over 51 percent of the final processed product consists of agricultural commodities that were grown domestically. Products from Guan, American Samoa, Virgin Islands, Puerto Rico, and the Northern Mariana Islands are allowed under this provision as territories of the United States. The Buy American provision (7 CFR Part 210.21(d)) is one of the procurement standards SFA's must comply with when purchasing commercial food products served in the school meals programs.

Boerne ISD will purchase domestic food products per the Buy American Provision unless:

1. The product needed is not produced or manufactured in the U.S. in sufficient and reasonable available quantities of a satisfactory quality; or
2. Competitive bids reveal the costs of a U.S. product are significantly higher than the non-domestic product

Boerne ISD will maintain all documentation in regard to any food purchases that are deemed "non-domestic" to include cost comparisons if the product is available as a "domestic" product that is seen as unreasonable in cost; or if not available as a U.S. grown product the documentation will include the "country of origin." (BISD CN Liaison)

Cost Analysis

(BISD CN Liaison in conjunction with the Director of Purchasing).

Boerne ISD will conduct a cost analysis to review and evaluate each element of cost to determine reasonableness, allocability, and allowability for products and/or services to be procured. The cost analysis will include the total projected cost for the products and/or services to be procured.

Boerne ISD will use the following tools and information to create the cost analysis:

1. List of products planned to purchase.
2. Prior vs current year potential cost for comparison, or
3. Current year vs proposal pricing comparison
4. Analysis will include a review of single price and extended cost based on estimated quantities.

5. Totals will be looked at for budget planning and determination of reasonableness.
6. When relying on a purchasing cooperative for bid procurement, Boerne ISD will ask the cooperative for the cost analysis and review planned products for purchase as a determination for cost reasonableness and compliance with allowable expenditures.

Small and Minority Businesses, Women Business Enterprises, and Labor Surplus Area Firms and/or Disabled Veteran Business Enterprise (MWDVBE)

(Director of Purchasing)

Boerne ISD will encourage open competition amongst small, minority, woman, and disabled veteran's businesses by:

1. Reducing barriers in Formal and Informal Contract solicitations by:
 - a. Allowing for businesses that may be MWDVBE to compete on an equal footing. This will be accomplished by having a qualification process where MWDVBE bids are given points equal to the requirements that may be restrictive, such as length of service in business, size of distribution facilities, etc...
 - b. Allowing for extra points in the evaluation if a bidder/proposer qualifies as an MWDVBE
 - c. Structuring contracts to allow "awards to more than one Proposer in the best interest of the District in order to award a portion of the agreement to MWDVBE vendor that may not be able to perform to an agreement that is too large for current financial/logistical capabilities.
2. Structuring Contracts that May allow for Cost Credit to Small, Minority and Women owned businesses:
 - a. Boerne ISD may structure an RFP Formal Procurement agreement to allow for price variation of not more than 5% of total cost above the lowest responsive bidder to award to a small, minority or women owned business.

For example, the lowest bidder was \$100 dollars, a certified small, minority or women owned enterprise bid \$105, the contract may be awarded to the small, minority or women owned enterprise if it is in the best interest of the District.
3. Providing Positive Outreach
 - a. Boerne ISD will place qualified small, minority and women owned enterprises on solicitation lists; and
 - b. Assure that small, minority and women owned enterprises are solicited whenever they are potential sources.

Local Sourced Products: Farm to School Initiative

(BISD CN Liaison)

Boerne ISD is committed to local markets and family farmers in the State of Texas. Our objective is to support the local agricultural economy and reduce the environmental impact of long-distance shipping. Boerne ISD defines "Local Sources Products" as products that are grown within the State of Texas, with preference to sources located within 100 miles of the school District's Central Office.

When purchasing local sourced products, Boerne ISD will follow the planning phase as stated earlier in this manual and do a cost/price analysis to determine the most appropriate procurement method.

In order to encourage the bidders to purchase locally sourced produce, Boerne ISD may assign additional point values in the “Award of Contract” section of the solicitation that can demonstrate:

1. The bidder is purchasing produce locally by submitting a list of local farmers, their addresses, the produce that is anticipated to purchase from each farm location, and the anticipated harvest dates of the produce.
2. The bidder must also agree to the ability to submit a report during the term of the contract that demonstrates continued purchases from local farms.

Use of Excess and Surplus Property

(BISD CN Liaison)

Boerne ISD, to the best of the district’s ability, may utilize excess and surplus property when available. The TDA allows a district to use a significant portion of our entitlement (PAL) allocation from USDA to purchase DOD fresh fruit and vegetable products. The TDA manages the solicitation and award of the DOD Produce Vendors. Contracting Entities (CE’s) in the state of Texas and participating in the DOD Fresh Program can receive weekly deliveries as outlined in the awarded contract.

Recalls

(BISD CN Liaison)

Boerne ISD will use the following procedures in regard to products that have been recalled, or are discovered to be defective or faulty:

1. The **BISD CN Liaison** will register for email notifications of recalled products through USDA Food Safety and Inspection Service (usfsis@public.govdelivery.com) and/or recalls.gov or any other viable resource in regard to food and product safety and recalls.
2. Vendors’ Recall procedures will be requested with every Small Purchase, IFB and RFP procurement method used.
3. Any notices or alerts from awarded vendors or distributors in regard to a recalled product will be handled immediately, following all instructions from the vendor or distributor in regard to the handling of the recalled product.
4. Actions may include but not be limited to:
 - a. Disposal of all affected product
 - b. Photos of products affected, documentation of case lot numbers, distributor codes or any other pertinent information as documentation of product origin.
 - c. Removal of affected product to a safe area to be picked up by the vendor or distributor.
 - d. Credits issued for all affected product that could not be used.

Unnecessary or Duplication of Goods/Services

(BISD CN Laison)

Boerne ISD will avoid acquisition of unnecessary or duplicative items/services. Boerne ISD will adhere to the following:

1. Implement internal controls to ensure that the district does not engage in contracts with duplicative services (paying for the same service twice) from the same contractor or different contractors.
 - a. Appointed staff members will review all Contracts and all products that are planned to be purchased from cooperatives and/or Food Service Management Companies to ensure that all purchases will not create payment for duplicative services.
 - b. Memberships in cooperatives will be reviewed to ensure that all products planned for purchase are not receiving a duplicated indirect fee.
2. Appointed staff will determine if there are like items in the District that may not be in use and consider transferring item before determining if purchase is necessary.
3. Appointed staff will confirm the item(s) being purchased are needed to serve, prepare, receive, transport or be stored for the planned menus.
4. Appointed staff will confirm any equipment items planned for purchase are replacing an obsolete, broken, damaged or outdated piece of equipment.

Cooperative Membership and Procurement

The USDA allows for “Purchasing Goods and Services Using Cooperative Agreements, Agents, and Third-Party Services.

Boerne ISD may participate in a purchasing cooperative when it is determined to be in the best interest of the district. As a governmental agency, Boerne ISD has the option to legally join a “governmental agency or Education Service Center (ESC) agency” purchasing cooperative through an Interlocal or Interagency Agreement.

If determined in the best interest to join an ESC Agency cooperative, Boerne ISD will request a copy of the Interlocal or interagency Agreement and complete and submit to the appropriate contact of the co-op. (Director of Purchasing) Boerne ISD will do the following once membership in the cooperative has been confirmed:

1. Provide product estimated quantities planned for purchase for each bid selected. (BISD CN Laison)
2. Review that all procurement documents and cooperative processes have been conducted in accordance with applicable Federal, State, and local regulations. (BISD CN Laison and Director of Purchasing).
3. Will confirm that their addition to any contract selected does not create a material change as

outlined in the contract per 2 CFR 200.318[e] that states a material change occurs when the change in scope of the contract is significant enough that potential bidders might have bid differently had they been aware of the impacts from adding additional agencies. **(BISD CN Liaison and Director of Purchasing)**

- a. Boerne ISD will review each solicitation document regarding material change threshold to confirm that the additional purchases will not exceed the contract value threshold.
 - b. Boerne ISD will confirm how the cooperative tracks additional items if any and contract values.
4. Request access to all documentation related to the contract for compliance with records retention requirement to include but not limited to:

(BISD CN Liaison and verified by Director of Purchasing)

- a. Solicitation
- b. Verification of Published Advertisement
- c. Contract Terms and Conditions
- d. Evaluation Criteria, if any
- e. Responses to include certifications and pricing
- f. Evaluation Committee Scores
- g. Notification of Awarded vendor(s)
- h. Documentation of any extensions or Amendments
- i. Recall Procedures

Appendix of Certifications

The following certifications will be used in all formal procurement methods.

Intangible Property	2 CFR 200.315
Procurement of Recovered Materials/Solid Waste Disposal	2 CFR § 200.322
Profit as a Separate Element of Price	2 CFR 200.323(b)
Record Retention Requirements	2 CFR § 200.333
Rights to Inventions	37 CFR §401.2 (a)
Anti-trust Certification	Section 2155.005
Certification of Residency	Chapter 2252, Subchapter A
Companies Engaged in Business with Iran, Sudan, or a Foreign Terrorist Organization	Chapter 2252, Subchapter F
Compliance with the Energy Policy and Conservation Act	Pub. L. 94-163, 89 Stat. 871
Compliance with Texas Family Code	Section 231.006
Food/Product Recall and HACCP Procedures	
Form 1295	Section 2252.908
Health & Safety Certificates, Licensing and Regulation	ARM 17.62
No Israel Boycott	Section 2270.002
Prohibited Employment Assistance	20 USC 7926
Non-Collusion Declaration	Section 15.01
Non-Collusion Affidavit	Section 15.01

Signature and Declaration of Compliance	Notary of Public Required
Proposal Form	200.326 Appendix I To Part 200
Breach of Contract Terms, Sanctions and Penalties	200.326 Appendix II to Part 200 (A)
Termination for Cause or Convenience	200.326 Appendix II to Part 200 (B)
Certificate of Insurance	2 CFR 200.447
Cooperative Agreements	2 CFR 200.24
Byrd Anti-Lobbying	2 CFR 200.450; 200.326 Appendix II Part 200 Sec. "I"
Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion for Covered Contracts	200.326 Appendix II To Part 200 Sec H
Clean Air and Water Certificate	200.326 Appendix II Part 200 Sec. "G"
Equal Opportunity Employment	200.326 Appendix II Part 200 Sec. "C"
Contracting with Small, Minority, Women Business Enterprises, and Labor Surplus Area Firms	2 CFR 200.321
Conflict of Interest Questionnaire	24 CFR § 3282.359
Disclosure of Lobbying Activities	Appendix B To Part 418 2 CFR
Felony Conviction Notification (Exhibit Only)	21 CFR 1301.90
Nutrition Services Certification For "Buy American" Provision	7 CFR 210.21 Sec. D
Nutrition Services "Buy American Waiver Exception List	7 CFR 210.21 Sec. D
Certificate Regarding Worker's Compensation	48 CFR 970.2803-1
Certificate Regarding Drug-Free Workplace	38 CFR § 48.635
Certificate Regarding Alcoholic Beverage And Tobacco-Free Campus Policy	21 CFR § 1140.1
E-Verify	48 CFR 52.222-54
Iran Contracting	48 CFR 25.703-3
Civil Rights/Discrimination	FNS Instruction 113-1
W9	Most Current Version Required

UPDATE RECORDS AND ENDNOTES

This manual is updated every year and as necessary based on changes to the TDA ARM.

September 28, 2023: Manual adopted for 2023-2024.

3. 3/19/2024 added "Has BISD obtained TDA approval for Capital Asset purchases?" to the planning phase of Procurement Phases section.
