



**Texas Association of School Business Officials  
TASBO Award of Merit for Purchasing Operations  
Application Guidelines**

<b>PURPOSE</b>	<b>2</b>
<b>ELIGIBILITY FOR CERTIFICATION</b>	<b>2</b>
<b>SUBMISSION DATE AND REQUIREMENTS</b>	<b>2</b>
<b>GUIDELINES FOR APPLICATION: FULL CERTIFICATION</b>	<b>4</b>
<b>SUBMISSION COMPONENTS: FULL CERTIFICATION</b>	<b>6</b>
<b>AWARD OF MERIT EVALUATION PROCESS</b>	<b>11</b>



**Texas Association of School Business Officials  
TASBO Award of Merit for Purchasing Operations  
Full Application Guidelines and Criteria**

**PURPOSE**

The Award of Merit for Purchasing Operations (AOM) was created to recognize Texas school districts, open-enrollment charter schools, and education services centers that are committed to following professional standards in the acquisition of goods and services.

Much of the AOM's evaluation emphasis is based on purchasing guidelines as identified by the Texas Education Agency (TEA) Financial Accountability System Resource Guide (FASRG) Purchasing Module and was originally based on the Best Practices in Purchasing as identified by the Legislative Budget Board (LBB) during the Texas School Performance Review process performed beginning in the mid-1990s.

The Award of Merit for Purchasing Operations will be presented at the TASBO Annual Conference each year. Entities will be notified in December that they are to receive the award and should plan to attend the conference to receive the award.

**ELIGIBILITY FOR CERTIFICATION**

**Full Application**

The TASBO Award of Merit for Purchasing Operations is open to Texas independent and consolidated school districts, open-enrollment charter schools, and education service centers (ESCs) regardless of their size. Districts, charter schools, and ESCs that have not previously received the award or were awarded the award but have completed the three concurrent (3) year recertification process must complete the full application.

**Recertification**

Consecutive awards can be granted to entities through a recertification submission. A purchasing office that achieved the AOM may elect to pursue recertification of its AOM for up to three (3) consecutive years.

- The entity was awarded the AOM within the last three (3) years and was recertified in the last three (3) previous years.
- The entity has not been recertified more than three (3) years in a row.
- Entities which have a change in the Chief Procurement Officer (director) from the person identified on the original application are eligible for recertification in the first year of that individual's leadership but must submit a full application the following year – i.e. if the leader changes in January 2023, the district may submit a recertification application for the current period but must submit a full application the following year.

**SUBMISSION DATE AND REQUIREMENTS**

The application period for certification and recertification is for the previous school year. (Example: The 2023 application is for the 2021-22 school year.) **SUBMISSION DEADLINE: FIRST FRIDAY OF EACH NOVEMBER or as otherwise noted on website** (November 1, 2024 at 5 PM CST this year). Applications received after that day will not receive consideration and entities will be notified.

**Method of Submission**

Upon receipt of the application, TASBO will create an account for the district to upload documents for review by the review committee. TASBO staff does not monitor the completeness of a submission. Please ensure that you review the application thoroughly and upload the required documents by the due date of the application.

**Requirements for Consideration: Full Certification**

1. All applicants must complete the TASBO Award of Merit for Purchasing Operations Application Form via an online TASBO registration and submit the components along with the applicable fees by the stated deadline.
2. Each applicant should provide complete information for the elements listed below.

## Guidelines for Application: Full Certification

The total points that can be awarded to each component are outlined below. The points assigned to a particular section and subsections are identified. The narratives are all "Pass/Fail" which means that the application should provide a strong response to the section, describing how the applicant's operations work towards achieving success in identified area. An applicant may receive the AOM by attaining a minimum point total of 150 out of the possible 270 total points.

Applicants are challenged to continue to seek additional points in subsequent years to achieve the highest possible score.

### Evaluation Scoring

Below are the scores assigned to the individual section and the subparts.

Sections	Proposed points	Required
<b>1. PURCHASING POLICIES AND PROCEDURES - NARRATIVE</b>	Pass/Fail	*
a. Board Policy (Local only if applicable)	10	*
b. Purchasing Ethics	10	*
c. Purchasing Manual	15	*
<b>2. PURCHASING ORGANIZATION, EDUCATION AND EXPERIENCE - NARRATIVE</b>	Pass/Fail	*
a. Purchasing Department Structure	5	
b. Higher Education (5 pts per employee with degree, maximum of 10 points)	10	
c. Experience of Purchasing-associated Staff	10	
<b>3. PURCHASING STAFF CERTIFICATION, ENGAGEMENT, AND TRAINING - NARRATIVE</b>	Pass/Fail	*
a. Texas Association of School Business Officials (TASBO) Certifications	10	
b. Purchasing Staff Engagement with TASBO Education and Training Opportunities	35	*
c. Purchasing Department Staff Training (non-TASBO related)	5	
d. In-Service Training of Non-Purchasing Staff	10	*
<b>4. PURCHASING OPERATIONS - NARRATIVE</b>	Pass/Fail	*
a. Requisition Approval Process	10	*
b. Annual Aggregate	10	
c. Vendor Spend	5	
d. Vendor List for Solicitations	5	
e. Specialized Funds (non-local)	5	
f. Cooperative Purchasing Agreements and Strategies	10	*
g. Records Management	5	
h. Internal Customer Feedback Regarding Vendor Performance	5	
i. Purchasing Department Staff Meetings	5	
<b>5. INTERNAL CUSTOMERS AND VENDOR COMMUNICATIONS - NARRATIVE</b>	Pass/Fail	*
a. List of Awarded Contract Vendors	5	
b. Internal Customer Surveys	5	
c. External Vendor Surveys	5	

<b>6. USE OF TECHNOLOGY - NARRATIVE</b>	Pass/Fail	*
a. Electronic Requisitioning	5	
b. Purchasing Internet / Intranet Presence	10	*
c. Use of Technology to Submit Purchase Orders Electronically to Contract Vendors	5	
d. Use of Electronic Procurement	5	
e. Electronic Vendor Registration and Review Current or Awarded Solicitations	5	
f. Online Surplus Auctions	5	
<b>7. PROCUREMENT CARD PROGRAMS SYSTEM - NARRATIVE</b>	Pass/Fail	
a. Procurement Card Procedures (card issued by a financial institution to be used with multiple merchants)	10	
b. Merchant-issued Customer Card Procedures (card issued by a specific merchant like fuel cards, Walmart, Home Depot,	5	
c. Procurement Card Programs Audit	5	
d. Staff Certification	5	
<b>8. WAREHOUSING - NARRATIVE</b>	Pass/Fail	
a. Operating Procedures	5	
b. Job Descriptions	5	
c. Inventory Report	5	

**Maximum Total Score – All Points: 270 points**

**Minimum Score to Receive Award \*: 150 points**

\* A score of 110 points must come from the required criteria, indicated by an “\*”, to receive the award. The maximum score for all items is 270.

## SUBMISSION COMPONENTS: FULL CERTIFICATION

### AWARD OF MERIT FOR PURCHASING OPERATIONS FORM

Please provide complete information on the following elements. Note that all sections that have an “\*\*” are required for all applications. Sections with “\*\*\*” are only for applicants that have the identified programs.

#### 1. PURCHASING POLICIES AND PROCEDURES - Section Maximum Score 35

##### Section Narrative \* (Pass / Fail)

Applicant is to provide a brief narrative (500 words or less) that addresses the policies and procedures of the organization for the following areas:

- Current purchasing local policies
  - Focus on ethics
  - Completeness of the district’s purchasing manual and associated procedures.
- a. Board Policy \* (Local only if applicable) (10 points)  
Provide a copy of the entity’s local board policies relating to purchasing operations and any other purchasing-related policies and regulations. Provide either a document or a URL for each.
- CH – Purchasing and Acquisition
  - CDB – Other Revenues—Sale, Lease or Exchange of School-owned Property
  - CHE – Purchasing and Acquisition—Vendor Relations
  - CJA – Contracted Services
  - CQ – Technology Resources
  - CI – School Property Disposal
  - CV – Facilities Construction (plus additional method specific policies)
  - DBD – Employment Requirements and Restrictions—Conflict of Interest
- b. Purchasing Ethics \* (10 point)  
Provide any documentation provided to the district’s staff on the standards and expectations of ethical standards of behavior. Provide either a document or a URL.
- c. Purchasing Manual \* (15 points)  
Provide a copy of the entity’s purchasing manual. The manual should have been updated within the last two (2) years and include the procurement components of the Texas Education Agency Financial Accountability System Resource Guide (FASRG) Module 5 Purchasing. If this information exists on an organization intranet and requires a login to view, the information MUST be provided as a PDF or other document (not a URL).

#### 2. PURCHASING ORGANIZATION, EDUCATION AND EXPERIENCE - Section Maximum Score 25

##### Section Narrative \* (Pass / Fail)

Applicant is to provide a brief narrative (500 words or less) that addresses the structure, education and experience of the organization for the following areas:

- Current purchasing department organization
  - Job descriptions
  - Education and experience
- a. Purchasing Department Structure (5 points)
- *Organizational Chart*: Supply a recent organizational chart illustrating where the purchasing function is assigned in the organization hierarchy. The purchasing function must be clearly noted on the organizational chart in relation to other departments within the district. A second chart showing the organization of the purchasing department may be required to indicate the chief procurement officer and staff. If warehousing is a function of purchasing operations, it should also be included. Documentation should not be more than three (3) years old.
  - *Job Descriptions*: All staff members assigned to the purchasing function must have a job description showing job title, to whom the position reports, wage/hour status, date last updated, primary job duties, secondary job duties (if any), qualifications, education/certification, special knowledge or skills, and prior experience.
- b. Higher Education (5 pts per employee with degree) (10 maximum points)

Provide evidence of the higher education degree status (photocopy of diploma or transcript) for the following positions:

- *Chief Purchasing Officer*: The applicant will receive points if the purchasing department's director, agent, coordinator, etc., has a higher education degree. For districts that do not have more than one purchasing staff person, use the education level for the chief purchasing officer or business manager that oversees the purchasing functions for the district.
  - *Purchasing Staff*: Provide proof of higher education degree for any purchasing support staff assigned to the purchasing department
- c. Experience of Purchasing-associated Staff (10 points)  
Provide evidence (e.g., service records, signed letters from human resources, etc.) of the purchasing staff that have five (5) or more years of service in K-12 purchasing operations.
- Chief purchasing officer
  - Purchasing support staff assigned to the purchasing department

### 3. PURCHASING STAFF CERTIFICATION, ENGAGEMENT, AND TRAINING - Section Maximum Score 60

Section Narrative \* (Pass / Fail)

Applicant is to provide a brief narrative (500 words or less) that addresses the staff certification, engagement and training of the organization for the following areas:

- TASBO certification
  - Engagement in professional development learning opportunities and training
- a. Texas Association of School Business Officials (TASBO) Certifications (10 points)  
Provide copies of Texas Association of School Business Officials (TASBO) certification documents for the purchasing department and related management staff (e.g., chief financial officer, business manager, chief purchasing officer, etc.). Combine files into one document.
- b. Purchasing Staff Engagement with TASBO Education and Training Opportunities \* (35 points)  
Provide copies of the following (if applicable) regarding purchasing staff engagement with TASBO education and training opportunities. Combine files into one document.
- Proof of attendance of TASBO annual conference
  - Proof of attendance of TASBO summer conference
  - Proof of attendance at TASBO Purchasing Academy
  - Proof of participation as an instructor or presenter at a conference or academy
  - Proof of attendance at TASBO affiliate meetings
  - Proof of attendance at TASBO meetings and/or programs (e.g. Committee Connect meetings, mentor / protégé)
  - Proof of participation as an instructor/presenter at affiliate meetings, etc.
- c. Purchasing Department Staff Training (non-TASBO related) (5 points)  
Provide a record of training given to purchasing staff members and any other procurement-related training within the fiscal year being submitted. The purpose is to show evidence that training programs are available to improve purchasing staff member skills. This does not apply to non-purchasing staff training (addressed below). Combine files into one document.  
Examples of evidence meeting this criterion include but are not limited to:
- Certifications of completion of classes, courses, seminars, and webinars
  - Training materials
- d. In-Service Training of Non-Purchasing Staff \* (10 points)  
Provide documentation of regular in-service training for its internal customers such as campus administrative support, bookkeepers, administrators, etc.). Combine files into one document.  
Examples of evidence meeting this criterion include but are not limited to:
- Sign-in sheets for in-service meetings
  - Agenda topics
  - Presentation slides

### 4. PURCHASING OPERATIONS - Section Maximum Score 60

Section Narrative \* (Pass / Fail)

Applicant is to provide a brief narrative (500 words or less) that addresses the purchasing operations of the organization for the following areas:

- Requisition processing
  - Reporting of aggregate and vendor spend
  - How the district manages its vendor list
  - Handling of specialized funds
  - Cooperative strategies
  - Records management
  - Vendor performance and purchasing meetings
- a. Requisition Approval Process \* (10 points)  
Provide an example of the workflow approval process for requisitions before conversion to a purchase order. An example may be a published flow chart diagram, a workflow from within an electronic finance system, etc., that shows the approval authorities and their placement within the workflow. Combine files into one document.
- b. Annual Aggregate (10 points)  
Provide a sample or excerpt of the report that is used within the purchasing department to determine aggregate spend levels. Combine files into one document.
- c. Vendor Spend (5 points)  
Provide an excerpt of the applicant's reporting process to review vendor spend, showing annual dollar expenditures by vendor and start and end date of the contract. This may be in several parts depending on how the entity keeps this information. Combine files into one document.
- d. Vendor List for Solicitations (5 points)  
Provide an example of a bidders list for a solicitation issued in the application year.
- e. Specialized Funds (non-local) (5 points)  
Provide examples of any additional procedures or processes related to the handling of specialized funds.
- f. Cooperative Purchasing Agreements and Strategies \* (10 points)
- *Board Resolution or Approved Minutes*: Provide a list of cooperative purchasing agreements either supported by board resolution or approved minutes from a board meeting.
  - *Annual Report of Cooperative Fees*: Per Texas Education Code 44.0331, the applicant is to provide proof of annual report of cooperative fees presented to the district's board of trustees as an agenda item.
  - *Interlocal Agreements*: Provide documentation for each of the district's active cooperative interlocal agreements and include applicable:
    - Executed board resolutions approving interlocal agreements or other authorizations.
    - Combine files into one document.
    - A copy of the signed interlocal agreement.
    - Formal checklist of questions used to evaluate the cooperative program and/or vendor.
    - Evidence of attendance at training sessions or webinars related to cooperative procurement and the evolving trends and practices during the application year.
    - Methodology or Key Performance Indicators (KPI) showing decision-making process for determining whether to use a cooperative vendor or amount of spend with cooperative vendors.
- g. Records Management (5 points)  
Provide examples of documented procedures that address the management of records within the purchasing department. Combine files into one document.
- h. Internal Customer Feedback Regarding Vendor Performance (5 points)  
Provide examples of:
- Internal customer surveys of vendor performances
  - Meeting minutes to discuss a vendor's performance and the written efforts made to provide the vendors with performance feedback
  - Letters/forms from internal customers regarding vendor performance.
- i. Purchasing Department Staff Meetings (5 points)  
Provide evidence of purchasing department staff meetings designed to ensure appropriate communication and handling of purchasing operations.

## 5. INTERNAL CUSTOMERS AND VENDOR COMMUNICATIONS - Section Maximum Score 15



Section Narrative \* (Pass / Fail)

Applicant is to provide a brief narrative (500 words or less) that addresses communications with internal customers and vendors for the following areas:

- Provides the names and contracts available to the internal customers
  - The effectiveness of the method.
- a. List of Awarded Contract Vendors (5 points)  
Provide a sample report, documentation, or a link to the district's list of awarded or contracted vendors available for use by the department's internal customers. Provide either a document or a URL.
- b. Internal Customer Surveys (5 points)  
Provide a sample report, documentation, or a link to the survey results from the internal customers. Provide either a document or a URL.
- c. External Vendor Surveys (5 points)  
Provide a sample report, documentation, or a link to the survey results from the vendors. Provide either a document or a URL.

**6. USE OF TECHNOLOGY** - Section Maximum Score 35

Section Narrative \* (Pass / Fail)

Applicant is to provide a brief narrative (500 words or less) that addresses the use of technology in the purchasing operations for the following areas:

- Electronic requisitioning
  - Internet presence
  - Electronic submission of purchase orders to vendors
  - The use of electronic procurement
  - Electronic vendor registration
  - Online auctions
- a. Electronic Requisitioning (5 points)  
Provide evidence of:
- An automated purchase order system, including remote entry of requisitions and centralized processing of purchase orders.
  - Training and/or written instructions (e.g., document, webpage, etc.) on the creation and processing of a requisition.
- b. Purchasing Internet / Intranet Presence \* (10 points)  
Provide examples of websites either in pdf or by active links within the application. The applicant can use examples included in other sections of the application. If this information exists on the organization's intranet and requires a login to view, the information MUST be provided as a PDF.
- c. Use of Technology to Submit Purchase Orders Electronically to Contract Vendors (5 points)  
Provide examples of purchase orders issued electronically to contracted vendors utilizing a "punch-out" system.
- d. Use of Electronic Procurement (5 points)  
Provide an example of:
- An electronic bid document that utilized the system.
  - A report that provides a sampling of the electronic vendors list within the system.
- e. Electronic Vendor Registration and Review Current or Awarded Solicitations (5 points)  
Provide an example or images of the online vendor registration system.
- f. Online Surplus Auctions (5 points)  
Provide examples of items that were successfully auctioned through the system.

**7. PROCUREMENT CARD PROGRAMS SYSTEM** - Section Maximum Score 25

Section Narrative (Pass / Fail)

Applicant is to provide a brief narrative (500 words or less) that addresses the procurement card program(s) for the following areas:

- Purchasing card programs
- Merchant issued cards
- Any audit findings
- Staff certification

- a. Procurement Card Procedures (card issued by a financial institution used with multiple merchants) (10 points)  
Provide a procurement card program procedural manual providing usage, limitations, and prohibited purchase requirements. This is regarding a card issued by a financial institution to be used with multiple merchants.
- b. Merchant-issued Customer Card Procedures (card issued by a specific merchant) (5 points)  
Provide a merchant-issued customer card program procedural manual providing usage, limitations, and prohibited purchase requirements. This is for a card issued by a specific merchant like fuel cards, Walmart, Home Depot, etc.
- c. Procurement Card Programs Audit (5 points)  
Provide a copy of the latest procurement card audit, or peer review, that specifically examines the procurement card program.
- d. Staff Certification (5 points)  
Provide evidence, if applicable, of a staff member(s) has received a Certified Purchasing Card Professional (CPCP) certification.

**8. WAREHOUSING - Section Maximum Score 15**

Section Narrative (Pass / Fail)

Applicant is to provide a brief narrative (500 words or less) that addresses the warehousing operations for the following areas:

- Operating procedures
  - Job descriptions
  - Inventory reporting
- a. Operating Procedures (5 points)  
Provide a manual detailing operating procedures including services provided, procedure for requisitioning supplies, return procedures and delivery schedule. If an entity policy exists, it should be included. If requisitions are processed electronically, documentation specifying procedures for data input must be included.
  - b. Job Descriptions (5 points)  
Provide job descriptions for employee types, along with the staff handbook detailing appropriate staff member behavior.
  - c. Inventory Report (5 points)  
Provide an inventory report showing the types and quantities of supplies maintained, the number of orders, the age of the stock on hand, etc., to be included. A shortened version (up to ten pages) can meet the example report requirement.

**Total maximum points: 270 points**

**Total points to receive a TASBO Purchasing Award of Merit \*\*: 150 points**

\* Required by all applicants.

\*\* A score of 110 points must come from the required criteria to receive the award.

## **AWARD OF MERIT EVALUATION PROCESS**

### **AOM Management Process**

1. The TASBO Purchasing Committee will identify candidates with a strong purchasing background to serve as the coordinator for the Award of Merit process.
2. The TASBO Executive Director will work with the AOM Coordinator and the Purchasing Committee to handle administration of the process, such as publicity, submissions, notices, etc.

### **AOM Evaluation Process**

The TASBO Award of Merit for Purchasing Operations (AOM) has several thresholds that must be met before an entity can be considered for this award.

1. Evaluation criteria are developed around proficiencies defined by the protocols for the Texas School Performance Review process managed by the LBB and requirements included in the purchasing section of the FASRG.
2. Individuals interested in being evaluators shall send an email to the AOM Coordinator no later than September 1 of the current calendar year. The AOM Coordinator may send emails to invite additional individuals to serve as evaluators, as needed. It is preferred that evaluators have worked within the purchasing organization of an entity that has been awarded the AOM
3. Applications must be submitted to TASBO by the first Friday of November. Each section of the application will be reviewed by two evaluators. Evaluations will be completed within 60 days.
4. The recommendations of the evaluators will be submitted to the AOM Coordinator.
5. Evaluation results are reviewed by the AOM Coordinator before being recommended for approval to the TASBO Executive Director. If the recommendation is to not award an application, the AOM Coordinator will verify that the recommendation is accurate prior to submission. If the final decision is to not award the AOM and the applicant believes the decision to be in error, the decision may be appealed by the applicant to the TASBO Executive Director, who shall refer the matter to the TASBO Board of Directors if it cannot be resolved.
6. Entities that have a minor deficiency will be notified by TASBO and have 14 calendar days to correct the deficiency. A minor deficiency is defined as a technicality involving the application, such as a missing signature, independent of the substantive evidence of merit described in the application.
7. It is anticipated that all entities approved for the AOM will be announced prior to the Winter Holiday.