



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

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 based on the following guidelines:

Eligibility for Recertification

- The entity was awarded either the AOM the previous year or was recertified in the previous year.
- The entity has not been recertified for more than three (3) consecutive years.
- Entities which have a change in the chief procurement officer during the fiscal year (director, administrator, agent, coordinator, or senior buyer) 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 2024, 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 recertification is for the previous school year. (Example: The 2025 application is for the 2023-24 school year.) **SUBMISSION DEADLINE: First Friday of November or 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 via online registration, 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: Recertification

1. All applicants must complete the TASBO online registration form for the corresponding application year and submit the requested information and applicable fees by the stated deadline.
2. Each applicant should provide complete information for the elements listed below.

SUBMISSION COMPONENTS: RECERTIFICATION

Subject Areas:

1. PURCHASING POLICIES AND PROCEDURES

In 500 words or less, consider the past year and provide a summary of purchasing policies and procedures as they relate to the following topics:

- Policy or administrative regulation changes to procurement due to recent Legislative action since your last submission.
- Changes in policy or regulation.
- Ethical issues or audit findings that are specifically related to Purchasing. Include a summary of the issue or the findings and steps toward correction action within the department, if any.
- How the purchasing policy manual has been kept current since the last award or recertification. Include any changes that were specifically written.

2. PURCHASING DEPARTMENT ORGANIZATION, EDUCATION AND EXPERIENCE (FORMERLY PURCHASING OPERATION ORGANIZATION)

In 500 words or less, consider the past year and provide a summary of the purchasing department's organization, education and experience as it relates to the following topics:

- How personnel counts have changed since your certification.
- If you have added or reduced personnel positions. Provide new job descriptions or a list of positions that were reduced.
- How your organizational structure has changed since your last certification.

3. PURCHASING STAFF CERTIFICATION, ENGAGEMENT AND TRAINING (FORMERLY PURCHASING STAFF TRAINING AND CERTIFICATION)

In 500 words or less, consider the past year and provide a summary of purchasing staff certification, engagement and training as it relates to the following topics:

- Training philosophy
- Types of training received by the purchasing staff (e.g., TASBO training)
- Additional entity staff outside the purchasing department that may have been training internally on the entity's purchasing processes and procedures
- A list of staff that received professional certifications (not limited to TASBO)
- Provide information of any educational updates of the entity's purchasing staff including any complete of degrees, certifications and training.

4. PURCHASING OPERATIONS (FORMELY PURCHASING CONTRACT OPERATIONS)

In 500 words or less, consider the past year and provide a summary of purchasing contract operations as it relates to the following topics:

- How your department updates bidder and supplier lists, including how changes are communicated to end users.
- How your department communicates or markets to potential new vendors. Provide a brief explanation if this process has changed since your last submission.
- If your organization has joined any new cooperatives or if you are participating in any purchasing alliances that will benefit your purchasing operations since your last certification.

- A summary of vendor performance issues that may have led to canceled contracts. Provide a summary of what the purchasing department has done to prevent similar issues. It is not necessary to name the specific vendor.
- A summary of how verification of annual aggregate limits for compliance with the competitive bidding requirements is handled.

5. INTERNAL CUSTOMER AND VENDOR COMMUNICATIONS (FORMERLY COMMUNICATION TOOLS)

In 500 words or less, consider the past year and provide a summary of internal customer and vendor communications as they relate to the following topics:

- A list of any new TASBO member(s)
- How the entity's approved vendors list has changed
- A summary of any new surveys that were conducted in the last year
- Any updates to the evidence of purchasing department staff meetings

6. TECHNOLOGY

In 500 words or less, consider the past year and provide a summary of use of technology as it relates to the following topics:

- An update of any technology changes affecting the purchasing operation.

7. PROCUREMENT CARD PROGRAMS SYSTEM (FORMERLY PROCUREMENT CARD SYSTEM)

In 500 words or less, consider the past year and provide a summary of the procurement card programs system as it relates to the following topics:

- How the procurement card system has been changed, modified (including cancellation) since certification. Provide a summary of the specific changes.
- How policy has been adjusted or how internal procedures have changed due to improper use or abuse of procurement cards. Provide a summary of the policy or regulations.

8. DISTRIBUTION AND WAREHOUSING (FORMERLY WAREHOUSING)

In 500 words or less, consider the past year and provide a summary of distribution and warehousing updates as they relate to the following topics:

- How the overall goals of the warehouse have change
- How the purchasing or warehouse department ensures goals are met

9. COOPERATIVE STRATEGY

In 500 words or less, consider the past year and provide a summary of your cooperative strategy as it relates to the following topics:

- Updates on the status of the entity's cooperative program since your last submission.

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 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.