

Recommendation 1: The district should consider having the Director of Purchasing report to the Deputy Superintendent.

- 100% Completion

Recommendation 2: Develop a consolidated Purchasing Department with two or more staff members available and trained in each area to maintain service. Hire one additional specialist position to oversee travel arrangements and manage travel coordination and one position for technology purchasing.

- 50% Completion: As of December 3, 2007, the positions of travel specialist and technology buyer have been filled. Training is currently in place and these positions should be fully functional by the end of January 2008.

Recommendation 3A and 3C: Modify CH (Local) Policy and Establish Criteria for payments not requiring a purchase order. This should include a CH Regulation rather than a board adopted policy for administrative flexibility.

- 25% Completion: Peer districts at the state and local level have been surveyed. Comparisons have been made to KISD CH (Local) versus peer districts. Updates and changes to the policy are in the works, and administrative regulations are being updated. We will bring the revised CH (Local) to the Board meeting on January 14, 2008 for a first reading. The revised CH (Local) will be brought to the February 11, 2008 Board meeting for the second reading and possible final approval.

Recommendation 4: Develop clear administrative regulations and procedures regarding travel procedures and communicate to staff so they can clearly identify the process to be followed and the options available.

- 50% Completion: As of December 6, 2007, updates to the Travel procedure regulation have been submitted to the Deputy Superintendent for review and possible presentation to Cabinet for approval.

Recommendation 5B: Develop and implement a travel folio.

- 25% Completion: As of December 3, 2007, the travel Specialist position has been filled. A prototype travel folio has been developed.

Recommendation 6: Develop Administrative Regulations for all areas of purchasing to supplement Board Policy.

- 10% Completion: As of December 7, 2007 administrative regulations for travel procedures, and vendor look up have been submitted to the Deputy Superintendent to take to cabinet for approval.

Recommendation 11: Review with Legal Counsel the use of the clause "Keller Independent School District reserves the right to add vendors at any time during the contract term on an 'as needed' basis" for a one-step procurement process (for non-construction contracts) under Section 44.031, Texas Education Code.

- 25% Completion: Only catalog bids, such as athletic supplies and equipment and instructional proposals carry this clause. No line item bids or proposals utilize this clause.

Recommendation 12A: Identify the best combination of price and discount for high quantity items and high cost items for the award of the contract(s) to only one or a few primary vendors, in addition to contract awards to secondary vendors, if needed, for items that are not available from the primary vendor(s).

- 50% Completion: Currently, only catalog bids are awarded to more than one or two vendors. All maintenance related proposals and any specialty bids are awarded to a primary and secondary vendor. All line item bids/proposals are awarded to a primary vendor and secondary vendors are utilized only if the primary vendor cannot supply the needed item or service.

Recommendation 12B: Consider a line-item contract award as another option for multiple-vendor award.

- 50% Completion: Currently all bids/proposals other than catalog discount bids are awarded on a line item basis in order to obtain “best value” for the district.

Recommendation 13: Purchasing should expand online instruction tools to better inform campuses/department of proper purchasing procedures.

- 25% Completion: On line vendor lists including sole source and Fundraiser Vendors are updated monthly on the Keller ISD Website. Travel Procedures Administrative Regulation has been submitted to the Deputy Superintendent for review and possible approval by Cabinet.

Recommendation 26: Examine all practices to develop user-friendly materials and methods of operation. Be open to vendors and staff.

- 100% Completion