



INDEPENDENT ESTIMATE DETERMINATION

Purpose: Federal regulations require documentation of cost analysis or price analysis for every procurement action at or above \$250,000. As part of the analysis, the regulations require documentation of an independent estimate reached before receiving bids or proposals (see 2 C.F.R. § 200.324) or before receiving quotes or proposals from other governmental entities through an interlocal contract or a purchasing cooperative (see 2 C.F.R. § 200.318 (e)). The Independent Estimate Determination is a form used to document McAllen Independent School District's (the "District") estimated range of *fair and reasonable costs* for the goods and/or services to be acquired, and to document the analysis **PRIOR** to seeking bids, proposals, or quotes. This form is kept as part of the procurement file along with the cost or price analysis, which is conducted after receiving proposals but before awarding a contract, to demonstrate that the procurement process was conducted in an open and fair manner and that the District received the most advantageous price.

Instructions:

1. Complete one (1) Independent Estimate Determination form **PRIOR** to:
 - a. advertising and receiving bids/proposals; or
 - b. seeking quotes/proposals from governmental entities through interlocal contracts or a cooperative.
2. Provide a detailed discussion of your independent estimate and attach the required supporting information.
3. Sign in blue ink and date the form.
4. Maintain a copy in the procurement/contract file along with the cost or price analysis (as completed before contract award), subject to retention schedules.

PART I: SCOPE AND/OR SPECIFICATIONS

The Scope of Proposal/Work and/or Specifications contains the following (check all that apply and attach documentation):

For Goods/Equipment	For Services
<input type="checkbox"/> Estimated quantity of items and/or goods required	<input type="checkbox"/> List of services/responsibilities to be performed
<input type="checkbox"/> Detailed description of each item required	<input type="checkbox"/> Detailed list of deliverables/tasks required
<input type="checkbox"/> Specifications and/or drawings for materials required	<input type="checkbox"/> Anticipated contract term and start date
<input type="checkbox"/> Date items and/or goods are required	<input type="checkbox"/> Location of project
<input type="checkbox"/> Delivery address and point of contact	<input type="checkbox"/> Specifications, drawings, and/or pictures of job site or projected results

PART II: INDEPENDENT ESTIMATE GUIDE

Estimate Type	Items to Include with Independent Estimate (must be attached)	Where to Find Supporting Information
Goods/Equipment	<ol style="list-style-type: none"> 1. Product needed 2. Estimated quantity 3. Unit price 4. Markups – overheads – profit 5. Desired delivery schedule 6. Warranty 	<ol style="list-style-type: none"> 1. Vendor survey/market survey 2. Current or past contracts for the same or similar product 3. Historical price and costs data
Services (other than professional services, as defined by Tex. Educ. Code § 44.031(f) and/or Tex. Gov't Code Ch. 2254)	<ol style="list-style-type: none"> 1. Tasks you want done 2. Types of people needed 3. Positions required 4. Estimated hours by position 5. Salary/billing rates applied 6. Prevailing wage rate category applied (if applicable) 7. Profit/applied fee 8. Direct expenses 9. Completion schedule 	<ol style="list-style-type: none"> 1. Current or past contracts for similar services 2. Other departments doing similar work 3. Historical price and cost data

PART III: INDEPENDENT ESTIMATE

This Independent Estimate is for: Goods/Equipment Services

Discussion of the Independent Estimate prior to receiving bids/proposals, including the District's estimated reasonable price range for the goods and/or services (attach additional explanation if necessary):

Goods/Equipment

Indicate the source used to develop the Independent Estimate of *Goods/Equipment* (check all that apply and attach supporting documentation):

- Vendor survey/market survey
- Current or past contracts for the same or similar product
- Historical price and costs data
- Other (please specify source and attach supporting documentation): _____

Services

Indicate the source used to develop the Independent Estimate of *Services* (check all that apply and attach supporting documentation):

- Current or past contracts for similar services
- Other departments doing similar work
- Historical price and costs data
- Other (please specify source and attach supporting documentation): _____

PART IV: CHECKLIST FOR REQUIRED ATTACHMENTS

- Scope of Proposal/Work and/or Specifications (as required by Part I).**
- For goods/equipment, documentation reflecting the following (as required by Part II):**
 - Product needed
 - Estimated quantity
 - Markups-overhead-profits
 - Unit price
 - Desired delivery schedule
 - Warranty
- For services, documentation reflecting the following (as required by Part II):**
 - Tasks you want done
 - Types of people needed
 - Positions required
 - Estimated hours by position
 - Salary/billing rates applied
 - Prevailing wage rate category applied
 - Profit/applied fee
 - Direct expenses
 - Completion schedule
- Documentation reflecting the source used to develop the independent estimate (as required by Part III).**
- If applicable, additional supporting documentation (e.g., explanation of the process and/or sources used or explanation of the estimate reached). Please provide a brief explanation of the additional documents:**

PART V: CERTIFICATIONS

I certify that I developed this Independent Estimate prior to receiving bids/proposals as required by 2 C.F.R. § 200.324. I further certify that, to the best of my knowledge and belief, the information provided above and attached hereto is true and correct, and that the Independent Estimate reflects a necessary, fair, and reasonable range of costs or prices for future procurement.

Name of Individual Preparing Form

Signature

Date

APPROVED:

Level One: Name of Program Manager (Grant)

Signature

Date

*** Items \$50,000+**

***Level Two:** Name of Director of Purchasing Services

Signature

Date

***Level Three:** Name of Assistant Superintendent for Program (Grant)

Signature

Date