

Purchasing Procedures

This policy addresses purchasing of necessary supplies, equipment and services that are not personal services. This policy does not address public improvement contracts. Public improvement contracts and personal services contracts are addressed elsewhere in these policies.

The business manager will provide each school and department with updated purchasing procedures and applicable forms at the beginning of each academic year. In the interest of promoting efficiency or economy, items commonly used in the various schools and their subdivisions will be standardized whenever possible, provided such standardization is consistent with educational goals.

The purchasing process is designed to operate in an efficient and effective manner.

Consideration has been given to both fiscal responsibility and staff resource needs. All purchases made by an approved purchase order or open purchase order will ensure accountability as well as quick responsiveness to staff needs.

Blanket purchase orders are designed to expedite routine purchases and payments, such as utility bills and recurring maintenance supply needs. A blanket purchase order will allow departments to purchase multiple items needed at different times throughout the year. A blanket purchase order is good for one year.

Petty cash can be used for purchasing materials immediately needed and under a \$40 value.

Check requests can be used in emergency situations as approved by the superintendent or business manager.

General Purchasing Procedures

These general purchasing procedures should be followed for purchases of all goods, supplies, materials and equipment:

1. **Requisition for Purchase:** It is the responsibility of the school and/or department to make certain that funds have been budgeted and the correct account numbers are used. All requisitions must be approved by the principal or other responsible administrator.
2. **Approval:** The business manager will review and approve the purchase requisition and create a purchase order. The building/department secretary will print the approved purchase order and attach the signed requisition.

3. Receipt of Goods or Services and Approval for Payment: When goods or services have been received, the school or department will send the purchase order, signed requisition and signed shipping receipt to the business office for payment, marking the purchase order as approved to pay.
4. Invoice Approval: The business office will match the approved purchase order to invoices received from the vendor. The business manager will review the invoice and attached documentation and authorize payment. Payment will be authorized when the following conditions have been met:
 - a. All necessary pre-approvals have been obtained.
 - b. Compliance with all agency purchasing procedures and regulations has been confirmed.
 - c. Budget authority has been confirmed.

The business manager will provide support to help in the purchasing process. A brief outline identifying the requirements for quotes follows:

1. Below \$10,000 in value per item/project: no quotes required. Goods and services may be purchased from approved vendors. When feasible, the school, department or business office will obtain competitive quotes, or purchase off of existing government agency contracts for recurring supply needs.
2. Between \$10,000 and \$149,999 in value per item/project: three written formal quotes must be attached to the requisition and summarized on a quote sheet.
3. \$150,000 or greater in value: requires formal competitive bidding process and Board approval. Please contact the business manager for assistance in this process.