

PROCUREMENT PROCEDURES

The following steps should be taken for purchases made from school or district funds.

1. Any employee desiring to make a purchase should complete the ["Request to Purchase"](#) form available at the school or central office.
 - ☒ A separate ["Request to Purchase"](#) form must be completed for each company.
 - ☒ The type of source (e.g. bid, single source, small purchase, etc.) must be checked on the form.
 - ☒ An explanation for checking "Small Purchase" and "Sale @ Reduced Prices" is required on the form.
 - ☒ The District Technology Coordinator should be consulted before seeking approval for purchases involving technology. ([See 04.31AP - Fiscal Management](#))
 - ☒ The Director of Building and Grounds should be consulted before seeking approval for purchases involving special utilities, installation, or construction. ([See 05.2AP - Facilities](#))
 - ☒ A ["Competitive Quote"](#) form, that includes at least three quotes, must be completed and attached to the ["Request to Purchase"](#) form for items not on the local or state price contract, according to Model Procurement Procedures.
 - ☒ Central Office must be contacted for proper bidding procedures and approval if a total project amounts to \$10,000 or more.
2. Have the principal or director sign the completed ["Request to Purchase"](#).
3. At the principal or director's office, the ["Request to Purchase"](#) will be screened to assure that Model Procurement Procedures have been followed and verify that funds are available.
4. When the purchase request is approved by a supervisor they issue a MUNIS purchase order completed with the proper coding. The Purchase Order should be signed and approved by the proper administrator. The Purchase Order should contain a clear description of the items being purchased. ([See 04.32AP3 - Fiscal Management](#))
5. If the purchase is by mail, the employee desiring to make a purchase should forward a copy of the approved purchase order to the appropriate company.

If the purchase is from a local supplier, a copy of the approved purchase order should be presented to the vendor when the purchase is charged. Return the receipt to the school or department treasurer.

Modifications to Procurement Procedures

1. If the company provides a checklist type order form (i.e. Trumpet) or a form with bid items listed (i.e. co-op) write "See Attached" on the "Request to Purchase" form and attach it to the completed order form. If you must list each item on an order form (i.e. Beckley Cardy) list the items directly on the "Request to Purchase" form.
2. The principal or approved designee may complete a Purchase Order form through the school or program treasurer and bypass the "Request to Purchase" form.
3. Schools/teachers may request reimbursement in limited situations. This practice must be kept to a minimum.
4. Purchase Orders must contain at least a general description of items being purchased.
5. All Purchase Orders must be done on MUNIS according to state regulations.

Excel Version of ["Request to Purchase"](#) and ["Competitive Quote"](#) Forms