

PURCHASING PLAN, K-8

Developing the Plan

Annually, each school with any of the grades K-8, must complete a Purchasing Plan which identifies the purchases to be made with textbook/instructional material funds allocated for the current adoption cycle. Local boards shall approve all plans as to sufficiency of funding to support purchases, and a copy of each school's plan must be filed at the local district office. Purchasing plans may be revised.

As a school's purchasing plan is developed, the needs in the adoptive content area(s), as well as the replacement needs of other content areas, must be considered. The following questions should be addressed during the planning process:

- Have replacement needs for all content areas been addressed?
- Are additional materials needed to provide for potential increases in enrollment?
- Are curricular/instructional design changes planned for the future that might necessitate additional purchases?
- How durable are the selected items? Has this issue been addressed in purchasing?
- Is the necessary hardware for electronic instructional materials available?

Completing the Plan

The following pages provide forms that may be used in the development of a school's purchasing plan. Every school's purchasing plan must be submitted to the district office for approval by the local school board and then kept on file. It is recommended that a school's purchasing plan be a part of its Comprehensive School Improvement Plan.

A school's plan must:

- provide opportunities for cooperation among teachers during the selection process,
- indicate the persons involved in the development of the plan,
- identify the purchases on district purchase orders or by using Sample Forms 2 and/or 3,
- stay within the funding allocation,
- include Form 4, "Budget Summary" and,
- include Form 5, "Statement of Accountability".

Questions regarding the completion of the purchasing plans should be addressed to one of the following:

- District Textbook Coordinator
- Kentucky Department of Education Instructional Resources Consultant

Purchasing Plan
Date _____

SAMPLE FORM
FORM 1

COVER PAGE

School Name _____

School Number _____ District Number _____

Grades _____ Enrollment _____

Adoption Cycle 20 _____ - _____

Content Area(s) _____

Names and titles of persons responsible for the development of the plan:

Purchasing Plan
Date _____

SAMPLE FORM
FORM 2

School Name _____ School Number _____

DETAILED PURCHASE PLAN FOR TEXTBOOKS
One completed form for each vendor or use a copy of the purchase order

Vendor _____

Textbook	*ISBN	Unit Cost	Quantity	Total Cost
Subtotal				
** Estimated Freight				
Total Cost				

* **International Standard Book Number (ISBN)** – In books, the ISBN is found on the backside of the title page. It is extremely important to use this number when ordering; otherwise mistakes could occur with your order.

** **State bid prices do not include shipping costs.** A good estimate of freight is 10%.

Purchasing Plan
Date _____

SAMPLE FORM
Form 3

School Name _____ School Number _____

DETAILED PURCHASE PLAN FOR INSTRUCTIONAL MATERIALS

One completed form for each vendor or use a copy of the purchase order

Vendor _____

Item	*ISBN or Catalog Number	Unit Cost	Quantity	Total Cost
Subtotal				
** Estimated Freight				
Total Cost				

* **Note on ISBN** – All items listed on the State Multiple List have an ISBN that should be used when placing orders. For supplementary items, a catalog number is appropriate.

** State bid prices do not include shipping costs. A good estimate of freight is 10%.

Purchasing Plan
Date _____

Form 4

School Name _____ School Number _____

BUDGET SUMMARY

Revenue:

Current State Allocation _____

Carry-over funds _____
(becomes carry-over on July 1)

Total State Monies _____

Projected Cost for:	Categories
Textbooks	
Instructional Materials	
Rebinding & Replacement	
TOTAL EXPENDITURES	

Projected carry-over funds _____

Purchasing Plan
Date _____

Form 5

School Name _____ School Number _____

STATEMENT OF ACCOUNTABILITY

We, the undersigned, certify that this Textbook/Instructional Material Purchasing Plan implements the Kentucky Academic Standards for the 20__ - ____ adoption cycle.

School Council Members' Signatures:

School Council Chair _____ Date _____

The cost of this plan is within the appropriation for this school.

School Board Chair _____ Date _____

In the absence of a school council, _____ Board of Education certifies that this Textbook/Instructional Material Purchasing Plan implements the Kentucky Academic Standards for the 20__ - ____ adoption cycle. The cost of this plan is within the appropriation for this school.

School Board Chair _____ Date _____

School Board Secretary _____ Date _____