

## MEMORANDUM No. 19

TO: Kentucky School Architects

FROM: Greg Dunbar, District Facilities Branch Manager; [greg.dunbar@education.ky.gov](mailto:greg.dunbar@education.ky.gov)

DATE: February 17, 2012

RE: Owner Direct Purchase Orders (DPO's) – New KDE Purchase Order Summary Form

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In order to facilitate KDE's District Facility Branch's (DFB) review and approval of proposed contracts which include an increasing number of proposed purchase orders for materials, DFB has developed a Purchase Order Summary Form (2/2012). Having the purchase orders totaled through the use of an excel spreadsheet will assist you in compiling this information and reduce errors. It will allow our plan reviewers to enter the total into our database rather than tediously entering the individual purchase orders. It can also be used to track changes during the construction process and will aid the reconciliation of those changes at the end of the project.

### INITIAL SUBMITTAL

This form shall be initially submitted **in a complete package** with the following:

- Copy of advertisement for bids as published.
- Bid tabulation.
- Form of proposal and bid security of the successful bidder.
- Architect's letter of recommendation regarding award of contract.
- BG-1 financial page revised to conform with the accepted bid.
- Board Order revising BG-1 financial page and authorizing a contract with the successful bidder.
- Unexecuted Owner-Contractor Agreement, Purchase Orders and Material Supplier Authorization Forms.

### CHANGE ORDER SUBMITTAL

Because the Purchase Order Summary Form is a 'running summary', it shall also be updated and re-submitted should a change order to a purchase order occur. The reason for the change shall be included in the appropriate column.

### FINAL SUBMITTAL

The "Final" change order summary form shall be submitted with each BG-4 project closeout form.

Finally, receiving **complete submittals** at all phases of a project is imperative to aid KDE in efficiently serving our districts.

Thank you for your assistance in helping us implement this process. Your feedback regarding the ease of use and/or functionality of this form would be greatly appreciated.

If you have any questions, please contact me at 502-564-4326.

Electronic Attachment