

SAMPLE FORM
FORM 1

School Name Spencer County Middle School

Grades 6-8 Enrollment 692

Content Area(s)	<u>Reading</u> <u>Math</u>
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Matt Mercer – Principal Amanda Butler – Teacher

Ashley McGaughey – Teacher Daniel Cox – Teacher

Beth Coke – Parent Angela Muddell - Parent

PURCHASING PLAN, P-8

Developing the Plan

Annually, each school with any of the grades P-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 8/21/14

SAMPLE FORM
FORM 2

School Name Spencer County Middle School School Number _____

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

Vendor Curriculum Associates
Fax: 1-800-366-1158

Textbook	*ISBN	Unit Cost	Quantity	Total Cost
Gr 6 RCC Reading	14553	\$11.99	265	\$3,177.35
Gr 7 RCC Reading	14554	\$11.99	250	\$2,997.50
Gr 8 RCC Reading	14555	\$11.99	250	\$2,997.50
Misc	Resources			\$827.65
Subtotal				\$10,000
** Estimated Freight				\$0
Total Cost				\$10,000

*** 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 8/21/14

SAMPLE FORM
Form 3

School Name Spencer County Middle School School Number _____

DETAILED PURCHASE PLAN FOR INSTRUCTIONAL MATERIALS

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

Vendor Curriculum Associates
Fax: 1-800-366-1158

Item	*ISBN or Catalog Number	Unit Cost	Quantity	Total Cost
Gr 6 Math RCC	RS14595.0	\$10.80	265	\$2862.00
Gr 7 Math RCC	RS14593.9	\$10.80	250	\$2700.00
Gr 8 Math RCC	RS14597	\$10.80	250	\$2700.00
Misc	Resources			\$1738.00
Subtotal				\$10,000
** Estimated Freight				\$0
Total Cost				\$10,000

* **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 8/21/14

Form 4

School Name Spencer County Middle School School Number _____

BUDGET SUMMARY

Revenue:

Current State Allocation **\$25,000**

Carry-over funds **\$0**
(becomes carry-over on July 1)

Total State Monies \$25,000

Projected Cost for:	Categories
Textbooks	\$20,000
Instructional Materials	\$5,000
Rebinding & Replacement	\$0
TOTAL EXPENDITURES	\$25,000

Projected carry-over funds \$0

Purchasing Plan

Date 8/21/14

Form 5

School Name Spencer Co Middle School Number _____

STATEMENT OF ACCOUNTABILITY

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

School Council Members' Signatures:

Manda Butler
Johnny McGaughey
[Signature]
Beth Coke

Angela Mitchell

[Signature]
School Council Chair

8/21/14
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 Core 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



P.O. Box 2001 • N. Billerica, MA 01862-0901
 Phone: 800-225-0248 • Fax: 800-366-1158
 Email: cainfo@curriculumassociates.com

Prepared For
 Tish Kennedy
 Spencer Co Middle School
 1263 Mount Washington Rd
 Taylorsville, KY 40071-9152

Price Quote

Quote Date: 8/6/2014 • Valid for 30 Days
 Quote ID: 66717

F.O.B.: N. Billerica, MA 01862
 Shipping: 12% of mdse. (min charge: \$10.99)
 Terms: Net 30 days
 Fed. ID: #26-3954988

CA Sales Representative

BENJAMIN STAVROS

502-612-9545

bstavros@cainc.com

Created by: BENJAMIN STAVROS

Modified by: BENJAMIN STAVROS

Please submit this quote with your purchase order.

Item #	Product Name	Qty	Retail Price	Unit Price	Total
RS14593.0	Ready Common Core Instruction Mathematics Grade 4 Student Book	15	\$12.00	\$10.80	\$162.00
RS14593.9	Ready Common Core Instruction Mathematics Grade 4 Teacher Resource Book	1	\$20.00	\$18.00	\$18.00
RS14594.0	Ready Common Core Instruction Mathematics Grade 5 Student Book	15	\$12.00	\$10.80	\$162.00
RS14594.9	Ready Common Core Instruction Mathematics Grade 5 Teacher Resource Book	1	\$20.00	\$18.00	\$18.00
RS14595.0	Ready Common Core Instruction Mathematics Grade 6 Student Book	265	\$12.00	\$10.80	\$2,862.00
RS14595.9	Ready Common Core Instruction Mathematics Grade 6 Teacher Resource Book	2	\$20.00	\$18.00	\$36.00
RS14596.0	Ready Common Core Instruction Mathematics Grade 7 Student Book	250	\$12.00	\$10.80	\$2,700.00
RS14596.9	Ready Common Core Instruction Mathematics Grade 7 Teacher Resource Book	2	\$20.00	\$18.00	\$36.00
RS14597.0	Ready Common Core Instruction Mathematics Grade 8 Student Book	250	\$12.00	\$10.80	\$2,700.00
RS14597.9	Ready Common Core Instruction Mathematics Grade 8 Teacher Resource Book	2	\$20.00	\$18.00	\$36.00
Special Notes		Merchandise Total:		\$9,700.00	
		Total Saving:		\$970.00	
		Estimated Tax:		\$565.70	
		Estimated shipping		\$698.40	
		Total:		\$9,994.10	

SPENCER COUNTY BOARD OF EDUCATION

207 W. Main Street

Taylorsville, KY 40071

Phone (502) 477-3250 - FAX (502) 477-3259

FIN:61-6001367

Check one:

Central Office ☐

Transportation ☐

School (Note) ☒

SCMS

Other (Note) ☐

Grant (Note) ☐

Purchase Order Form

Firm Name: Curriculum Associates

Date 8/8/2014

Attn: _____

Address: _____

City/State/Zip: _____

Phone: _____

Fax: (1800) 366-1158

PO# 1521157

This PO number must appear on all
invoices, packing lists, packages and
all correspondence.

Bid Source

Single

**Tax Exempt #
B191**

Please furnish the merchandise, materials or service itemized below:

DO NOT BACKORDER

Quantity	Catalog Number	Item, Description, Size, Color, etc		
15		ws14551 Gr.4 Ready Common Core Instruction Reading	11.99	\$ 179.85
1		ws14551.9 Gr.4 Ready Common Core Teacher Resource	19.99	\$ 19.99
15		ws14552 Gr.5 Ready Common Core Instruction Reading	11.99	\$ 179.85
1		ws14552.9 Gr.5 Readyn Common Core Teacher Resource	19.99	\$ 19.99
265		ws14553 Gr.6 Ready Common Core Instruction Reading	11.99	\$ 3,177.35
7		ws14553.9 Gr.6 Ready Common Core Teacher Resource	19.99	\$ 139.93
250		ws14554 Gr.7 Ready Common Core Instruction Reading	11.99	\$ 2,997.50
6		ws14554.9 Gr.7 Ready Common Core Teacher Resource	19.99	\$ 119.94
250		ws14555 Gr.8 Ready Common Core Reading	11.99	\$ 2,997.50
6		ws14555.9 Gr. Ready Common Core Teacher Resource	19.99	\$ 119.94
				\$ -
				\$ -
		10% Discount per Ben Stavros		\$ (995.18)
		PLUS APPLICABLE SHIPPING		\$ -
				\$ -
				8,956.66

SHIP TO: SPENCER COUNTY MIDDLE SCHOOL

1263 MT. WASHINGTON ROAD

TAYLORSVILLE, KY 40071

ATTN: Tish Kennedy

Ordered By: Tish Kennedy

INVOICE TO: SPENCER CO. BOARD OF EDUCATION

207 W. MAIN STREET

TAYLORSVILLE, KY 40071

\$24,882.05

Received By: _____

Matt Mercer

Program Approval Signature

0412118-0643-160A Instructional Resources

Org

Object

Project

Kathy Morgenstern

Central Office Accounts Payable Signature

Superintendent's Signature (purchase exceeding \$5000)