

# **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 5/26/17**SAMPLE FORM**

Form 3

School Name TES School Number 012**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
ELA + Math Supplemental Materials				4,263.51
Subtotal				4,263.51
** Estimated Freight				—
Total Cost				4,263.51

\* **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 5/30/17**SAMPLE FORM**

Form 3

School Name TES School Number 012**DETAILED PURCHASE PLAN FOR INSTRUCTIONAL MATERIALS**

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

Vendor Academic Edge  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Item	*ISBN or Catalog Number	Unit Cost	Quantity	Total Cost
Lexia Core 5		8900	1	8900
Subtotal				8900
** Estimated Freight				—
Total Cost				8900

\* **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 5/26/17**SAMPLE FORM****Form 3**School Name TES School Number 012**DETAILED PURCHASE PLAN FOR INSTRUCTIONAL MATERIALS**

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

Vendor Dreambox Learning  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Item	*ISBN or Catalog Number	Unit Cost	Quantity	Total Cost
Dreambox		6200	1	6200
Subtotal				6200
** Estimated Freight				—
Total Cost				6200

\* **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**

Form 4

Date 5/26/17School Name TES School Number 012**BUDGET SUMMARY****Revenue:**Current State Allocation 19,363.51Carry-over funds \_\_\_\_\_  
(becomes carry-over on July 1)Total State Monies 19,363.51

Projected Cost for:	Categories
Textbooks	<u>                    </u>
Instructional Materials	<u>19,363.51</u>
Rebinding & Replacement	
<b>TOTAL EXPENDITURES</b>	<u>19,363.51</u>

Projected carry-over funds

Purchasing Plan

Form 5

Date 5/26/17

School Name TES School Number 012

### 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:

Sarah A. Scholud

Pam Thaman

Kristen Scheid

\_\_\_\_\_

Kater Hale

\_\_\_\_\_

Karen D. Brandt

\_\_\_\_\_

Pam Thaman

School Council Chair

5/26/17  
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