

# **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 (704 KAR 3:455). District superintendent 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 district superintendent 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 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

<b>Textbook</b>	<b>*ISBN</b>	<b>Unit Cost</b>	<b>Quantity</b>	<b>Total Cost</b>
<b>Subtotal</b>				
<b>** Estimated Freight</b>				
<b>Total Cost</b>				

**\* 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
<b>Subtotal</b>				
<b>** Estimated Freight</b>				
<b>Total Cost</b>				

\* **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** \_\_\_\_\_

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

**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 Principal

\_\_\_\_\_  
Date

\_\_\_\_\_  
District Superintendent

\_\_\_\_\_  
Date