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
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__________  

School Name _____________________________  School Number _____________  

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

Vendor  
____________________________________________________________________  
____________________________________________________________________  

<table>
<thead>
<tr>
<th>Textbook</th>
<th>*ISBN</th>
<th>Unit Cost</th>
<th>Quantity</th>
<th>Total Cost</th>
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</table>

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%.
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

<table>
<thead>
<tr>
<th>Item</th>
<th>*ISBN or Catalog Number</th>
<th>Unit Cost</th>
<th>Quantity</th>
<th>Total Cost</th>
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</table>

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%.
BUDGET SUMMARY

Revenue:
Current State Allocation

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

Total State Monies

<table>
<thead>
<tr>
<th>Projected Cost for:</th>
<th>Categories</th>
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<tr>
<td>Textbooks</td>
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<tr>
<td>Instructional Materials</td>
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<tr>
<td>Rebinding &amp; Replacement</td>
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</tbody>
</table>

TOTAL EXPENDITURES

Projected carry-over funds
Purchasing Plan

Date __________

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