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 ___________________________________________

<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%.
**DETAILED PURCHASE PLAN FOR INSTRUCTIONAL MATERIALS**

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

<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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**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%.”

Subtotal

**Estimated Freight

Total Cost
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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<tr>
<td><strong>TOTAL EXPENDITURES</strong></td>
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</tbody>
</table>

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 Principal

________________________________________
District Superintendent

_______________________________          ________________
Date                                      Date