

# **Dundee Central School District**

## **Guidelines for Purchasing**



## Board of Education Policy

The process by which the budget is developed is governed by law and policy. Each request form is developed and formatted to comply with these requirements as well as for your convenience. District policy requires each purchasing decision to follow these steps:

- Determine if NYS Contract pricing is applicable. If NO...
- Determine if BOCES bid will be used for goods...If NO...
- Determine if the Vendor being recommended is a sole source proprietary provider (this will be a rare occurrence)...If NO...
- Obtain competitive pricing for goods/services as required by law and set forth in Board policy. This must be documented.

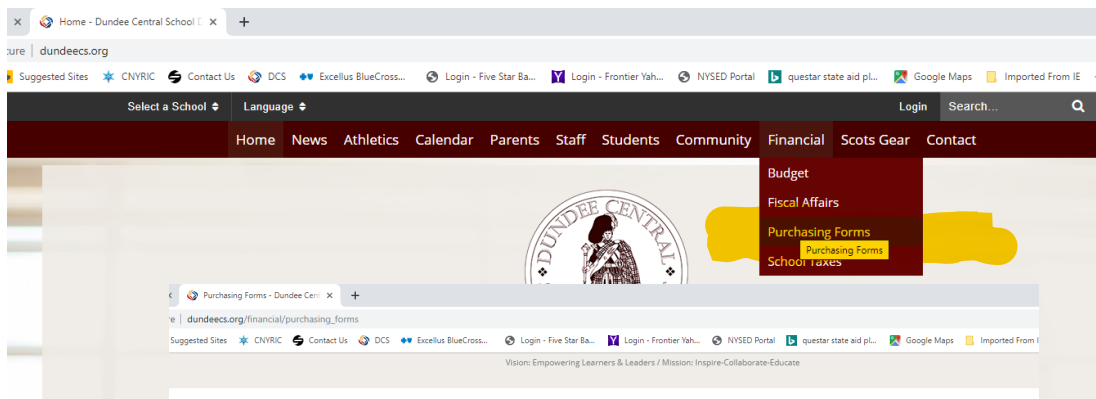
When evaluating competitive pricing for goods and services, NYS Law requires aggregate purchases of supplies, services and equipment exceeding a certain dollar threshold to be purchased through a formal sealed bid process. As a result, specific brand or manufacturer's items cannot be guaranteed.

## Supervisory Review of Budget Requests

Each principal and supervisor is responsible for establishing a budget procedure for their areas of responsibility. Each grade level and department chair must review and approve the requests for their area of responsibility prior to supervisory review.

## Budget Requests

All requests are on plain white copy paper this year to accommodate their electronic completion. Each request is to be on the appropriate form. Begin by going to [www.dundeecs.org](http://www.dundeecs.org) and clicking on District | Financial | Purchasing/Budget Forms and Resources tabs.



### PURCHASING FORMS

#### Purchasing Forms

Dundee Central School District / Financial / Purchasing Forms

#### Purchasing Requisition Forms

**How to use:** Below PDFs are fillable forms allowing you to type in the information (it will even calculate cost(s) for you) and save/print the forms to be taken to Business Office etc...

HOWEVER these forms must be opened in **Adobe Reader** to be filled in and perform calculations.  
NOTE: All staff issued devices have Adobe Reader pre-installed.

Please follow below steps to download/save the forms to your device and open in Adobe Reader to use properly:  
1. Right-click (tap+hold) and select option from menu **Save Link As...** below.  
2. Save to whichever location you so choose but remember where it went.  
3. Make your way to where the document was saved, right-click (tap+hold) on it and select **Open With**, Adobe Reader should appear in the list. Left-click (tap) Adobe Reader and away you go.  
NOTE: If steps do not work, please contact DCS Tech Services.

File Name	Size	Modified
#Purchasing Handbook	272 KB	08 January 2015
Addendum Page to Requisition Form	282 KB	01 August 2015
Contracts Services Training and Repairs Requisition Form	144 KB	01 August 2015
Field Trip Request Form	142 KB	01 August 2015
Purchasing Vendor Website	99.6 KB	08 January 2015
Supplies Materials Equipment and Software Requisition Form	124 KB	01 January 2015
Textbook Requisition Form	147 KB	01 August 2015

Here you will find all the forms required in order to procure goods and services. Click on the 'Click Here' for the form or resource you wish to use. These forms are fillable forms, where you can type directly into them and they will automatically calculate totals. Additionally, links are provided to WFL BOCES bids, NYS Contracts for commodities, School Specialty and Staples Websites.

- **Supplies, Materials, Equipment & Software Requisition** – Use for any consumable items and for items not specifically included on another request form. Note that **no vendor order will be placed that is for \$15 or less, without express written approval of the purchasing agent. Additionally, vendors MUST ACCEPT PURCHASE ORDERS. You are responsible to confirm this!** Use this form for general equipment, furniture, computers and peripherals, A/V equipment and supplies, software, computer supplies, site licenses, uniforms, etc. Note that for any technology or software request, Web based or otherwise, approval of the district's System Analyst is required. Additionally, a completed Technology Adoption Form must accompany your request.
- **Requisition Form Addendum** – Use this form to enter any overflow items that may not fit on the requisition forms. It will automatically total and you can enter the calculated total on the space provided on the requisition form, indicating it is attached and entering the amount.
- **Fieldtrip Requisition** – Use for requested instructional fieldtrips. Be sure to include estimated round trip miles and duration of trip (including travel time), admission fees, and other costs such as meals. Please note that submission of requisition does not imply trip approval. Trips must be approved by your building principal or supervisor. Additionally, it is incumbent upon requester to coordinate fieldtrip activities with Arts in Education coordinator during the planning stages of educational fieldtrips.
- **Textbook Requisition** – Use for hard-covered books; paperback books; courseware or other content-based instructional materials in electronic format; workbooks designed to be written in and used up; manuals; and newspapers or news magazines which have a general circulation, are printed and distributed at least biweekly, and have a paid circulation within the school district.

*Examples of materials that are NOT textbooks but rather supplies are reference materials such as encyclopedias, almanacs, atlases and dictionaries; supplementary textbooks, novels, fiction, magazines, newspapers, except as provided above, and audiovisual materials normally housed in the school library or instructional materials center for short-term use by pupils; tests and testing materials; teachers' editions of textbooks; review books; materials in kit form; and books or materials advocating or supporting a religious belief; and internet on-line services.*

*Be sure to include the ISBN number of the textbook you are requesting (not the ISBN of the text you are replacing) to avoid delay in ordering.*

***If you are requesting a new textbook series, you must coordinate your purchase request to obtain Board of Education approval prior to completing your requisition, so you must plan accordingly. Complete the Instructional Materials Selection Criteria and Guidelines Form and submit to your principal to begin the processing.***

*You should ensure full compliance with Copyright laws regarding the reproduction of any printed materials, including workbooks.*

*Please note, that if there are changes after you have submitted your completed request such as an increase or decrease in the number of texts needed, you must notify the business office immediately.*

- **Contracts, Services, Training & Repairs Requisition** – Use for any outside vendor used for repairs, maintenance, cleaning, service contracts, dues, memberships, registrations, fees, including those associated with competition participation, testing, professional services, equipment reconditioning, anticipated conference or workshop attendance, etc.

## **REMEMBER...**

- **PLEASE BE SURE TO FOLLOW THE INSTRUCTIONS ON THE FORMS REGARDING OBTAINING ADDITIONAL PRICING AND/OR FORMAL QUOTATION DOCUMENTATION. THIS INFORMATION SHOULD BE NOTED ON THE FORMS AND/OR ATTACHED.**
- A separate sheet for each vendor/company
- Provide a detailed description of your requested goods or service so we can order exactly what you want
- Don't guess at prices; use a catalog or obtain verbal or written pricing from your vendor.
- **School Specialty** and **Staples** provide the District with a **significant** discount off of retail prices. Equipment discounts must be obtained by the Business Office through direct communication with School Specialty and Staples.
- **If there are ANY changes to any request you have submitted, PLEASE notify the business office immediately.**

## **SCHOOL SPECIALTY ONLINE ORDERING**

Please contact the Business Office about using School Specialty Online ordering to prepare your requisitions! Easy breezy way to save yourself time and to ensure accurate ordering.