

# MONONA GROVE SCHOOL DISTRICT

## Administrative Rule 672

### PURCHASING PROCEDURES AND GUIDELINES

#### A. Purchase Order Requirements

Requests for materials, equipment and services must be initiated with a purchase order. This procedure shall be used in all situations except in the event of an emergency repair or an unusual purchase requiring prompt action. In these rare cases, a phone call can be made by the key administrator to the Director of Business Services to acquire a purchase order number which can then be phoned to the vendor. The administrator shall approve all of these confirming order requests before the District Office is called for a purchase order number.

All administrators shall be given a supply of purchase orders for use in preparing requests for purchases during the year. Staff members are not authorized to make verbal or written purchase agreements without a purchase order or order number. Violation of this rule may result in the individual staff member being personally liable for the cost of all items involved.

#### B. Completion of Purchase Orders

The following procedures must be adhered to when preparing purchase order forms:

1. Purchase orders must be typed and information readable on all copies of the form.
2. The vendor name, address and number (when appropriate) must be complete and accurate.
3. Quantity of each item to be ordered must be typed in the appropriate column.
4. The description of each item to be ordered must be specific and include current catalog numbers.
5. Unit prices, extensions and purchase order total must be entered. If actual price is not known, an estimated price or a "not to exceed" total must be entered.
6. Shipping location (school/department/staff member/address) must be complete.
7. Correct account codes must be used.
8. If the order is "confirming," then the order number must be typed in at the top and the "confirming order" box checked off.

Before the completed purchase order is sent to the District Office, the administrator responsible for the purchase shall do the following:

1. Review all information on the order.
2. Verify that adequate budgeted money remains unencumbered in the designated account(s) to accommodate the order.
3. Initial the order.

C. Final Processing of Purchase Orders

When the District Office has received all copies of the completed purchase order:

1. A purchase order number shall be assigned.
2. The authorizing signature of the Director of Business Services or the Superintendent shall be obtained.
3. The purchase order shall be released to the vendor and a copy sent back to the originator.

The business office reserves the right to order the materials, equipment or services from sources other than requested if a better price can be obtained for merchandise/services of comparable quality. Staff involved shall be contacted before a vendor change is made.

Upon acceptable receipt of the goods or services ordered, the individual receiving the order shall sign off on the gold copy of the purchase order and return it to the District Office immediately so that invoices can be paid as appropriate.

APPROVED BY THE SUPERINTENDENT:            April 9, 2003