



Shepherd School Purchasing Handbook

Shepherd School District #37

Shepherd, MT

www.shepherd.k12.mt.us

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GENERAL GUIDELINES

The quality and quantity of purchases for the Shepherd School are determined by the various employees. Purchases of supplies, materials, and equipment, service and maintenance agreements are done on an annual basis.

However, throughout the year small and occasional purchases are made as approved by the Superintendent up to \$15,000.00 without board approval.

Any request for purchase that exceeds \$80,000.00 must, by law, be purchased through the formal sealed bid process. This process takes 1-2 months so you must plan ahead on purchases of this amount. The Board of Trustees must approve both the call for bids and the award of bid; a minimum of two board meetings are required plus statutory bidding time lines.

The Shepherd School will, at times, use a written "Request for Quote" form. This form is used to allow the District to "shop" for the best price on various items not included on a bid.

BASIC POLICIES

All Shepherd School purchases must be authorized by the Building Principal then the District Superintendent.

Shepherd School will obtain maximum value for each dollar spent.

The Purchasing department will comply with all government laws and regulations that are applicable to insure the public trust in Shepherd School contracting.

Purchasing Department personnel do not accept personal gifts from vendors nor do they conduct purchasing transactions for personal benefit. This standard applies as well to any and all personnel employed by or acting officially on behalf of the district.

REQUISITIONS

Shepherd School uses an on-line requisition system for purchasing. A username and password are required to access the requisition system. Upon hire, you will receive your login credentials

form the District Clerk. Instructions for completing the on-line requisition can be obtained from your building principal or administration office.

All requisitions require approval from the Building Principal and the Superintendent before a purchase order can be processed. Incomplete requisitions will not be processed.

If the order is a rush, the requisition should be indicated in the "Notes" field and should be followed up with an email to the purchasing department.

All items requested to be purchased must be entered into the requisition system. Once requisition has been approved by all necessary administrators, the requisition will be processed into a purchase order.

PURCHASE ORDERS

A Shepherd School purchase order is required for all purchases of service and supplies. Shepherd School is not liable for unauthorized purchases. Accounts Payable will not process an invoice without a purchase order. You run the risk of a long delay or no payment if the proper procedure has not been followed.

REIMBURSEMENTS

If an item was purchased for the Shepherd School or an employee is requesting reimbursement for travel expenses, a [Reimbursement Request](#) must be filled out to its completion, approved by the Building Principal (prior to purchase/travel) and by the Superintendent. Include all necessary receipts with the form and return to the District Office once completed with the appropriate approvals.

P-CARD PURCHASING

Shepherd School has set up credit card purchasing through the P-Card system. Administrators and sponsors who are issued a P-Card are required to sign the District's P-Card Use Agreement which allows them to purchase goods for school use only that have been approved by their supervisor. P-Card purchasing must follow the same guidelines as all other purchasing. A [P-Card Purchase Request](#) must be filled out and approved by the Principal and Superintendent before any purchases can be made. Improper usage of your P-Card will result in termination of P-Card privileges. Possible disciplinary actions up to and including risk of termination or legal actions may also result with misuse. Immediately after use the P-Card, a P-Card Purchase form,

along with all receipts, must be turned in to the District office. Monthly statements are received and receipts must match the statement. This must be done promptly so payment can be mailed on time to avoid late charge.

PAYMENTS

Payments for goods and services are made through the Accounts Payable department. When items are received, they will be checked for compliance to specifications. If they are as ordered, it will be noted on the purchase order and the items will be paid for through District claims. If errors occur, the purchasing agent will contact the vendor. Individuals should not contact the vendor. Partial shipments will also be noted on the purchase order. **Payment for items purchased that have not followed the purchasing guidelines shall be the sole responsibility of the person who placed the order.**

ANNUAL ORDERS

Annual orders should be completed by the deadlines set by the Superintendent.

VENDORS

All Purchase Orders are ordered online. When placing requisitions, receive item number from the selected vendor's website and include on requisition to ensure accurate ordering. When ordering from Amazon, please follow the ["Wish List" instructions](#) to send to the purchasing department. If you cannot send a "wish list" to the purchasing department, be very detailed and specific on your requisition as to what item you want ordered.