

Purchasing: Authorization and Control

Bellevue School District Purchasing Department's purpose is to support the procurement needs of all schools and departments in the District. Purchasing can assist you in getting the best value for dollars expended as well as meet all district, local, state, and federal requirements. For questions or guidance contact Purchasing at X4141.

All goods and services for use in the Bellevue School District should be purchased directly by the District. Staff members should not buy goods or services with personal funds to be directly reimbursed from an outside agency or organization.

Care should be taken to ensure that all goods, supplies and equipment purchased with district resources are secured from theft and only used for its intended purpose. Items purchased with district funds are not for personal use.

Items that have exceeded their useful life or are no longer needed must be declared as surplus and disposed of according to district [Policy 6881 Disposal of Surplus Equipment and/or Materials](#).

Competitive Pricing and Bid Requirements

Requestors of goods and services must secure competitive prices, where possible, and obtain the maximum value for each dollar expended. Thresholds where bids or quotes are required are outlined in Procedure 6220P.

Authorization of Purchases

All purchases must be allowable. No purchase shall be initiated without pre-approval.

- Budget authority approval must be obtained digitally or in writing for all purchases
- Department approval such as Technology, Music, Athletic, etc. must be obtained digitally or in writing to ensure that equipment is suitable and is compatible with any current or planned standards
- ASB Student Council must approve ASB expenditures and record approval in the meeting minutes
- The Purchasing Department has memberships, purchase agreements and contracts with approved vendors that may offer discount pricing and satisfy bid requirements. Contact Purchasing at x4141 for more information.
- Funds expended using Professional Growth Funds must be approved by Human Resources department BEFORE expenditure.
- Funds expended using State or Federal Grant money may have special conditions imposed. Please contact your Grant/Budget Analyst before using grant funds.

Methods of Purchasing

The District Purchasing Department has identified three purchasing options. Please contact the school or department office manager or the Purchasing Department for assistance in determining the best purchasing option for you.

District Procurement Card (P-Card)

The District procurement card is the most common method of purchasing general supplies in the District. Using a P-Card is like using a credit card, it is fast, easy to use, more agile and, with some exceptions, accepted by most vendors for everyday purchases.

The District has secured discount pricing with many online vendors such as Amazon Business, Staples Advantage and KCDA. For this reason, shoppers should not use non-business personal accounts when making online district purchases. Contact the Purchasing Department for log in information for established accounts.

Please be aware that some purchases are not allowed by P-Card such as salaries and wages, personal services, alcohol, gifts and gift cards, cash advances, etc. – [see full list of prohibited expenditures](#)

- Get approval from the person with budget authority prior to making a P-Card purchase
- Check out a P-Card from the school or department office manager
- Read Policy and Procedure 6212 for P-Card guidelines prior to making a purchase
- Determine the best pricing for the item sought
- Swipe card or enter card number at check-out (for on-line purchases)
- Ensure the delivery is to a District facility
- Print or retain original detailed receipts
- Note the educational or business purpose of the purchase then sign and date the documentation
- Additional documentation (invoice or quote, food form, class lesson, etc.) may also be required. [See Documentation Requirements below](#)
- Return P-card and all original detailed receipts with any required documentation to the school or department office manager
- Card manager enters data into PaymentNet such as account code, purpose and sales tax status
- Card managers must complete and submit weekly reports to Business Services per schedule

Purchase Order (PO)

Purchase orders are used for more complex purchases requiring quotes or bids; ongoing purchases (open PO's); personal services requiring contracts or MOU's, vendor agreements, registrations, etc. Only the Purchasing department may issue a Purchase Order to the vendor. A Purchasing Requisition is not a Purchase Order.

- Enter request (purchase requisition or PR) into BusinessPLUS
- Enter tax if applicable. The District is subject to paying sales tax on all taxable purchases. (If you are unsure if a purchase is taxable contact the Purchasing Department)
- Ensure the delivery is to a District facility
- Attach quotes or other documentation. [See Documentation Requirements below](#)
- Submit and approve through workflow

- A PO number will be assigned by the purchasing department after all approvals are obtained
- The amount of the PO will be shown as an obligation in the Encumbrance column on the budget report
- E-mail notification with the PO number will be sent to the originator
- Purchasing will send a PO to the vendor to complete the ordering process
- Invoices from vendors should be addressed to the Bellevue School District Accounting Office

Reimbursement

Staff are encouraged to order supplies through the school or department office manager; however, the District will reimburse staff, parents or students for **pre-approved** allowable expenses in emergency situations, extenuating circumstances or when a vendor does not accept PO's or district P-Cards.

Please be aware that purchases using a gift card, gift certificate, or store credit from personal purchases will not be reimbursed.

- Prior approval must be obtained digitally or in writing by the person with budget authority before personal funds are expended
- Ensure the delivery is to a District facility
- A Claim for Reimbursement form must be completed and signed by employee and budget authority
- Documentation of the business or educational purpose must be included with the claim
- Original detailed receipts including method of payment must be submitted with the claim
- Additional documentation (invoice or quote, food form, class lesson, etc.) may also be required, see Documentation Requirements below
- Department or Office mails claim to accounting for reimbursement processing

Contact with Vendors

Purchasing is responsible for adding vendors to the vendor data base and for collecting the necessary documentation. Staff wishing to work directly with vendors should be aware of the following guidelines:

Staff may:

- Contact vendors to obtain information on potential purchases or to request a quote
- Ask Purchasing (ext. 4141) for vendor suggestions
- Ask vendors to send all invoices to the District Accounting Office only at PO Box 90010 Bellevue, WA 98009-9010

Staff may not:

- Commit to any purchase or service without prior approval
- Arrange for delivery to a non-district facility
- Ask vendors to send invoices directly to the school or individual making the purchase

- Sign contracts or agreements on behalf of the District unless specifically identified as an authorized signer ([see Contracts section below](#))

Allowable Purchases

District Funds should only be used to further the educational or business purpose of the District. The following purchases are allowable when consistent with other district policies. Purchases using federal or other grants funds may be more restrictive. Check with the grant program manager before making any purchase.

- Supplies, materials or services for educational or business purposes are subject to [Policy 6220](#) and [Procedure 6220P - Bid Requirements](#);
- Travel consistent with Policy and Procedure [6212 and 6212P – Purchasing Cards \(P-Cards\)](#) and [6213 and 6213P – Travel Authorization and Reimbursement](#);
- Equipment consistent with guidelines outlined in Policy and Procedure [6801 and 6801P - Capital Assets/Theft Sensitive Assets](#)
- Food subject to [Smart Snacks](#) guidelines, [Child Nutrition Policy & Procedure 6700](#), and [Staff Food Policy & Procedure 6240](#)

Non-Allowable Purchases

The following purchases are NOT allowable. listed items are examples and not inclusive of all potential purchases.

- Gifts, gift certificates, or gift cards per Washington State Constitution Article VIII, Section 7
- Flowers as a gift
- Alcohol
- Food for meetings or events that are not beneficial to the operation of the District
- Cash advances
- Salaries and wages
- Items for personal use or non-district purposes
- Fuel for personal vehicle
- Gratuities in excess of reasonable and customary amounts
- Using a **P-Card** to send donations to charity
- Using a **P-Card** to pay for personal services, consultant agreements, or performance groups
- Using a **P-Card** for purchases of goods for which the District has a bid
- Using a **P-Card** for purchases for which the District has issued a purchase order, unless approved in advance by purchasing department
- Using a **P-Card** to pay for goods or services through on-line application software where required to store the card number on a personal device or computer (Uber, Lyft, etc.)

Documenting Purchases

Complete documentation must accompany all purchases or reimbursements – examples include:

- Invoices or Quotes
- Requisition for Goods and Services form
- Contracts, MOU's, or Agreements as required ([see chart below](#))
- Detailed, original receipts
- Packing slips
- Food & Beverage Request Form. See [Policy & Procedure 6240](#)

- Lesson Plans when purchasing food for classroom purposes
- ASB Minutes documenting the approval of any purchase
- [Extended Field Trip form](#) for overnight trips involving students
- Prior Approval for Overnight Travel for staff traveling without students
- Travel Summary for Approved Travel for documenting post-travel expenses and submitting a claim for reimbursement
- Other miscellaneous documentation such as e-mails, notes, or other relevant information regarding the purchase

Delivery of Goods and Supplies

*All orders placed for goods or supplies (including online orders) using district funds whether by Purchase Order, district P Card or personal funds **must be shipped to a District facility**. Violations could lead to the loss of credit card or ordering privileges.*

Ship to:

- A school in the District
- The District Warehouse
- A department in the District
- The District PO Box (as allowable based on shipper's rules)
- The District Purchasing Office

Do not ship to:

- Staff home address
- Parent or student home address
- Off-site meeting facilities
- ANY non-district addresses

Deliveries may be held for pick up by district staff at the vendor will-call site in lieu of shipping.

If items are delivered to one district location and are needed at another, the items may be transported by a District staff member or sent via district mail between district locations.

Receiving Goods, Supplies and Services

It is the responsibility of the requestor to ensure goods are received and reconciled with the packing slip, or that services have been performed within the terms of the agreement prior to invoices for payment being approved.

- Principals or department heads shall designate locations and the staff responsible for receiving deliveries within their buildings
- Online receiving is the way schools and departments acknowledge receipt of merchandise or services and approve payment
- Designated staff must have security rights in the BusinessPLUS Financial system allowing them to record items or services received on Purchase Orders in the receiving screen
 - Enter the amount of goods or services in the amount field of the receiving screen
 - Record packing or invoice number in the "packing" field
 - Date and sign documentation then scan and attach to the record in BusinessPLUS

- include any notes pertaining to the order (final, partial, shortage, backorder, etc.)
- The Accounting Department processes payments after matching the PO, invoice, and receiving

Note: P-Card purchases are reconciled using the PaymentNet system from JP Morgan Chase. See [6212P Use of District Charge Cards](#)

Return of Goods or Supplies

The return of items purchased will vary depending upon the original purchase method.

Items purchased by a PO:

- Returns are coordinated through the Purchasing Department
- Request a PO Action Form
- Complete the form
- Send the form and the goods or supplies together to the Warehouse
- Purchasing Department obtains the return authorization from the vendor
- Warehouse will hold the goods or supplies for pick up
- Vendor will issue a credit upon receipt of goods or supplies.

Items purchased by P-Card:

- Card holder contacts the vendor to coordinate the return
- Follow the vendor's instructions for return
- Ensure a credit is applied to the original card used

Items purchased by staff reimbursement:

- Staff should only submit a claim for reimbursement when items are placed into service and will not be returned
- If an item must be returned after the District has issued a reimbursement, the refunded money must be paid to the District

Recording of Assets

Assets are recorded per policy and procedure [6801 P Capital Assets/Theft-Sensitive Assets](#) in the Destiny Asset Tracker or other district approved tracking systems. Please contact the appropriate department when purchasing items such as (listed items are examples and not inclusive of all potential purchases):

Technology Department:

- Computers and personal devices
- Printers, Cameras, Drones
- Software licenses
- Video displays

Music Department:

- Musical Instruments, Band Uniforms

- Band uniforms

Curriculum Department:

- Books for classroom or library
- Manipulatives

Warehouse Department:

- Nutrition small wares used in district kitchens

Activities and Athletics Department:

- Sports equipment
- Sports uniforms
- Robots
- Other ASB equipment items

CTE Department:

- Items used in CTE classrooms not recorded elsewhere

Contracts

Contracts/Agreements that obligate the District must have advance approval and can only be signed by authorized individuals. Contact Purchasing at x4141 before executing any agreements/contracts.

Type of Contract & Amount	Approval Authorization	Contract Signature Authorization
Purchase Orders	Individual(s) with budget authority	Purchasing Manager
Formal Bids	School Board approval then individual(s) with budget authority	Superintendent or Deputy Superintendent for Financial Services
Lease/Rents	<p>Equipment: Individual with budget authority</p> <p>Real Property: Deputy Superintendent for Financial Services</p>	<p>Deputy Superintendent for Financial Services or Director of Facilities. Purchasing Manager for state contract leases via PO.</p> <p>Deputy Superintendent for Financial Services or Director of Facilities.</p>
Small Works Construction Projects Under \$300,000	Director of Facilities	Director of Facilities
Formal Bids for Construction Projects Over \$300,000	School Board approval then individuals(s) with budget authority	Director of Facilities

Procedure 6210P

Personal Services/Professional Services Memorandum of Agreement (MOU) \$1,000 to \$2,499.99	Individual with budget authority	School or Department Budget Authority Purchasing Manager
Personal Services/Professional Services Contract \$2,500.00 to \$ 14,999.99	Individual with budget authority	School or Department Budget Authority Purchasing Manager
Personal Services/Professional Services Contract \$15,000.00 or more	Individual with budget authority	School or Department Budget Authority and Cabinet Level Administrator
ASB Purchase Orders or Personal/Professional Services Contracts	ASB Officers or ASB Council and Individual with Budget Authority	School Budget Authority, Purchasing Manager, and/or Cabinet Level Administrator as necessary.

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