

# OSBA Model Sample Policy

Code: DJ  
Adopted:

## District Purchasing

The function of district purchasing is to serve the educational program by providing the necessary supplies, equipment and services. Items commonly used in the various schools and their subdivisions will be standardized and be consistent with educational goals and in the interest of efficiency or economy.

The [business manager] is appointed by the Board to serve as purchasing agent. He/She will be responsible for developing and administering the district's purchasing program.

No obligation may be incurred by any officer or employee of the Board unless that expenditure has been authorized in the budget, by Board action and/or Board policy. In all cases calling for the expenditure of district money, except payroll, a requisition and purchase order system must be used.

No purchase [with the exception of a petty cash purchase] will be authorized unless covered by an approved purchase order. No bills will be approved for payment unless purchases were made with an approved purchase order.

The superintendent or designee is authorized to enter into and approve payment on contracts obligating district funds [not to exceed \$[10,000] [150,000]] for products, materials, supplies, capital outlay and services that are within current budget appropriations.

The Board shall approve all contracts that are collective bargaining agreements or service contracts that include the provision of labor performed by district employees, such as custodial, food service and transportation services.

The [business manager] will review bills due and payable for the purchase of supplies and services to determine if they are within current budget appropriations. After review, the [business manager] will direct payment of the just claims against the district. The superintendent [and business manager] is [are] responsible for the accuracy of all bills and vouchers.

No Board member, officer, employee or agent of this district shall use or attempt to use his/her official position to obtain financial gain or for avoidance of financial detriment for himself/herself, a relative or a member of their household, or for any business with which the Board member, relative or member of household is associated. [Acceptance of any gratuities, financial or otherwise, from any supplier of materials or services to the district by any Board member, officer or employee of the district is prohibited.]

END OF POLICY

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### Legal Reference(s):

ORS 244.040  
ORS Chapters 279, 279A, 279B, 279C  
ORS 294.311

ORS 328.441 to -328.470  
ORS 332.075

OAR 125-055-0040

# **DISCLAIMER**

Attached are the model policy and/or administrative regulation sample(s) you requested. You may print these and should present them to the school board for discussion, modifications and final adoption. The model samples **CANNOT** be adopted in the current format. You must make a choice for all text in brackets when present.

# OSBA Model Sample Policy

Code: DJ-AR  
Revised/Reviewed:

## Expenditure of District Funds for Meals, Refreshments and Gifts

The district recognizes there may be occasions when it is appropriate for Board members, administrators and others to expend district funds in the course of conducting district business to provide meals or refreshments (i.e., bakery goods, snacks, fruit, punch, coffee, tea, soft drinks, etc.). The purchase of gifts may also be approved in certain situations. Such occasions may include, but are not limited to, various district and building level meetings, gatherings to celebrate district successes or recognize individual achievements, contributions or outstanding service to the district and other district and school-sponsored activities. Such expenditures may be made with prior [Board] [superintendent] approval only, subject to the provisions of this administrative regulation.

The use of district funds, as used in this regulation, means the use of money in any of the general accounts of the district. This includes the General Fund, Food Service Fund and others. It also includes money in student body accounts held at each school that are derived from any student activity or from parent organizations. Exceptions are funds collected from staff members or others for the specific purpose of providing gifts or parties. It is also recognized that buildings may have established a "social fund" or "sunshine fund" to which each staff member may voluntarily contribute. Such funds are generally used for birthday recognition, bereavement and illness acknowledgment activities, etc. These funds are also exempt from the following requirements.

### Meals and Refreshments

District funds may be used to pay for individual or group meals only if official district business is being conducted during the time in which the meal is provided and only if the meal provides a particularly practical time or setting for the discussion, consistent with Board policy and the following:

1. Meals may be provided by the district to recognize the contributions of staff, through retirement dinners or other recognition events;
2. Meals may be provided by the district as a part of Board or administrative work sessions, at district or building-level committee meetings or other district-approved activities.

Meals not directly business related may be provided to staff or others at the individual's expense only.

Board members, principals and other district administrative staff may use district funds to provide refreshments for staff, parents or others at meetings, in-service programs or other similar district or school-sponsored activities, [not to exceed [\$ ] per participant and] subject to the following additional requirements:

1. The purchase of alcoholic beverages with district funds is strictly prohibited;
2. The use of district funds for parties is prohibited.

## Gifts

There are numerous occasions that may arise whereby Board members, administrators or other district staff may feel the need to recognize employees (i.e., Administrative Professional's Day, teacher appreciation week, classified employees' week, birthday, etc.). A Board member, administrator or other district employee may provide such recognition at his/her expense only, unless as otherwise permitted below:

1. The district may provide a small token of appreciation for a Board member's or employee's retirement and years of service and other related activities utilizing district funds, as approved in advance. For example, the Board generally proclaims special recognition for classified employees' week and teacher appreciation week;
2. Administrators may use district funds to provide an appropriate token of appreciation on behalf of the Board. The value of this item may not exceed [\$50] per person;
3. No other expenditure of district funds for gifts is permitted without prior authorization from the Board or superintendent.

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