

DEPARTMENTAL CORRESPONDENCE

To: WPSF Grant Recipients

From: Betsy Gavron, Interim Assistant Superintendent

Date: September 16, 2023

Re: Procedure for purchasing items funded by WPSF grants

Purchase Order Process

As has been done in previous years, the following process should be used when submitting Purchase Orders:

1. Complete a Purchase Order Request Form with the following: title of WPSF grant, year of grant, vendor name and address, fax number, items to be ordered with correct price(s). PLEASE INCLUDE 15% FOR SHIPPING AND HANDLING UNLESS OTHERWISE STATED BY THE COMPANY. Please submit this form by email to:
betsy_gavron@waylandps.org or by interoffice mail to Betsy Gavron, Interim Assistant Superintendent at Central Office.
2. Her office will prepare and mail/fax purchase order(s).
3. When you **receive** your order, you **must** let Betsy Gavron's office know that all of your order has arrived.
4. Purchases less than \$10,000 require following best practices, which means seeking the most competitive pricing by obtaining three quotes verbally over the phone, in writing from the vendors or through internet searches. Purchases more than \$10,000, but less than \$50,000, require three quotations obtained in writing from the vendors. Written documentation of three responses must accompany the purchase order. Purchases that exceed \$50,000 may not be made without following the formal RFP process; **you must contact Betsy Gavron's office before proceeding if the purchase may fall into this category.**
5. **All purchases related to technology equipment or software must be sent directly to Leisha Simon, Director of Technology.**

Reimbursement

Reimbursements are the **exception** and not the rule. You should use the purchase order process

for all requests and should contact Betsy Gavron's office first to see if we have arrangements with on-line or local vendors. In the **extreme** exception when the vendor does not accept a purchase order, you may purchase the items. Please follow this procedure when requesting reimbursements: Before you purchase any items you first need to send a purchase order request indicating the supplies you intend to purchase, with the estimated amount that you expect to spend, to Betsy Gavron. You **cannot** purchase the items until you have been notified that the purchase order has been cleared by the Business Office. Once you have purchased your items please send all **original** receipts to Betsy Gavron. Please note we are not allowed to reimburse for sales tax.

If you do purchase items and would like to be reimbursed, please submit the following to Betsy Gavron:

1. For online orders: submit the **on-line confirmation and** a copy of your credit card statement reflecting the charge
2. For in store payments with charge cards: submit the **original store receipt and** a copy of your credit card statement showing the charge
3. For in store payments with check: submit the **original store receipt and** a copy of the canceled check
4. For in store cash purchases: submit the **original store receipt**
5. In all cases, please include your contact information as well as the address where the reimbursement should be sent. **Process for Consultants/Instructors/Speakers**

When contracting with a consultant, instructor or speaker, **a signed contract and a completed W-9 must first be in place** before we can proceed with the payment process. It is important to note that it can take **up to 6 weeks** for a payment to be processed. It is the Town's policy that checks are mailed directly to the vendor (and not handed to the vendor on the date of service), so please plan accordingly. Also, the Town's policy is that payments cannot be processed until all services have been rendered.

Please also complete a **Purchase Order Request form** and submit it to Betsy as instructed above. Also include an **invoice** from the consultant, instructor or speaker. When completing the Purchase Order Request Form, please reference the invoice from the consultant, instructor or speaker in the "Description" section of the Form.

If you have any questions regarding the process above, please do not hesitate to contact

Betsy Gavron, Interim Assistant Superintendent at Central Office - 508-358-3772 or e-mail her at betsy_gavron@waylandps.org