

GENERAL PURCHASING INSTRUCTIONS

1. Budgets are usually approved at the August board meeting for use beginning September 1. [Budget figures](#) are based on [enrollment](#), [projected enrollment](#), and/or needs according to accreditation standards. If your school has a budget need that exceeds normal allocations, your request must be presented to the library director no later than January, before budget preparation begins.

2. BUDGET CODES:

Books:	6329.07	
Databases:	6329.06	
Processing:	6399.01	(Office supplies)
AV Materials:	6399.22	(Bulbs, blank tapes, etc.)
AV Software:	6399.24	
Periodicals:	6329.01	

3. All book, AV, database, periodical, and supply orders will be submitted to the library office where they will be processed and then submitted to purchasing.
4. Some principals want to see and to sign requisitions prior to the requisition being sent to Library Services.
5. Approved library book and AV vendors, periodicals, and office supplies are on district bids. Every attempt should be made to use [approved library vendors](#).
6. Maintain a consideration file with all pertinent information needed for ordering: author, title, publisher, ISBN, LC#, requested by and review source.
7. **NO STANDING ORDERS ARE PERMITTED.** This would allow publishers permission to ship and bill you for any new volumes produced in the future. Funds may not be available in the future to cover such expenses. The district does not allow purchase orders to carry over from one budget year to the next.

8. **NO PREVIEWS ARE ALLOWED.** An example of preview material is when a sales representative brings you books, you look at them, decide which ones to keep, send the others back, and then issue a purchase requisition. This is in violation of district policy.
9. **NO CONFIRMING PURCHASE ORDERS ARE ALLOWED.** An example of a confirming purchase order is when books, supplies, or any items are in your hand and *then* you requisition them. In some rare, unusual cases, the director of Library Services can make an exception (in advance) for this.
10. **KEEP A COPY OF ALL YOUR ORDERS.** Purchasing will send you the receiving copy of all orders shipped directly to you. You must check in your orders. If an order is incomplete and indicates that you have items on backorder, give the packing slip to your bookkeeper so a Partial Receipt Acknowledgment can be submitted to accounts payable. **You will only sign the receiving copy when the order is complete.** Your bookkeeper will forward to accounts payable for payment. The library office will handle all paperwork for orders sent from the vendor to the library office for processing.

(The only exception will be your periodical order. Our present bid stipulates that the receiving copy will be signed and forwarded to accounts payable for payment in early October. If you find that you are not receiving periodicals as ordered you are to call EBSCO direct at 1/800/487-2426.)

11. Most book orders should be over-ordered by at least 30%, saying, "Do Not Exceed \$XX.00" (with XX being the amount prior to adding the 30% of book titles). *For example, if you have \$1,000 to spend and books are \$10 each, you would expect to receive 100 books. However, list 130 books and still say "Do Not Exceed \$1,000.00." This allows your money to be spent even if titles are out of stock, out of print, etc., yet will not get you in trouble if all 133 books are available. The company will fill from the top of your order unless you specify differently. If you have priority titles on your attached list, clearly indicate on the face of the purchase order how the vendor is to fill the order.*

12. Pay careful attention to when books are to be published. Do not order anything published after April of the school year in which you are ordering. These orders tend to go unfilled and result in you losing your encumbered amount.

13. ORDERING BOOKS and AV--FULLY PROCESSED

- a. **Order books from the companies listed, with full processing**
Ship books, shelf ready, to your campus
Baker and Taylor
Bound to Stay Bound
Follett
Gumdrop
Mackin
PermaBound

- b. **Order AV from the companies listed, with full processing, attached OR unattached.**
Ship AV with full processing, attached or unattached, to your campus.
Follett
Library Video
Mackin

14. ORDERING BOOKS AND AV--NOT PROCESSED

- a. **Order books or AV from any other bid vendor**
- b. **Do not order records**
- c. **Have items shipped to LIBRARY SERVICES for shelf ready processing:**
Northside Independent School District
Library Services
607 Richland Hills, Suite 100
San Antonio, TX 78245-2149