

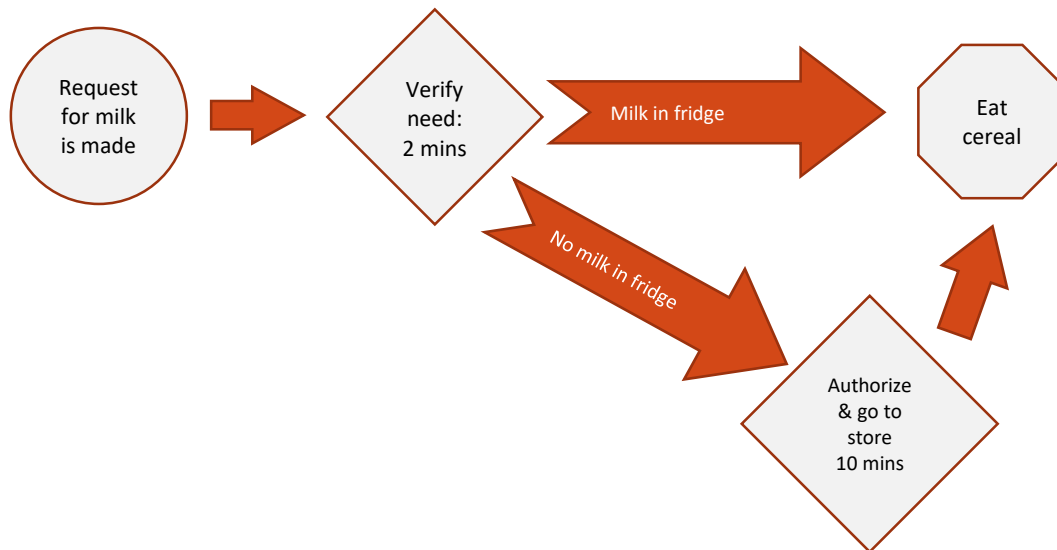
# Purchasing Flowchart Project



## EDUC 6500 School Finance

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### Context:

Each district has its own procedures and guidelines for expending tax dollars. Generally, the procedure must follow specific steps in a specific order. Flowcharts are a graphic that give a visual representation of the process. Here is an example of what a simple flowchart for the process of buying milk could look like:



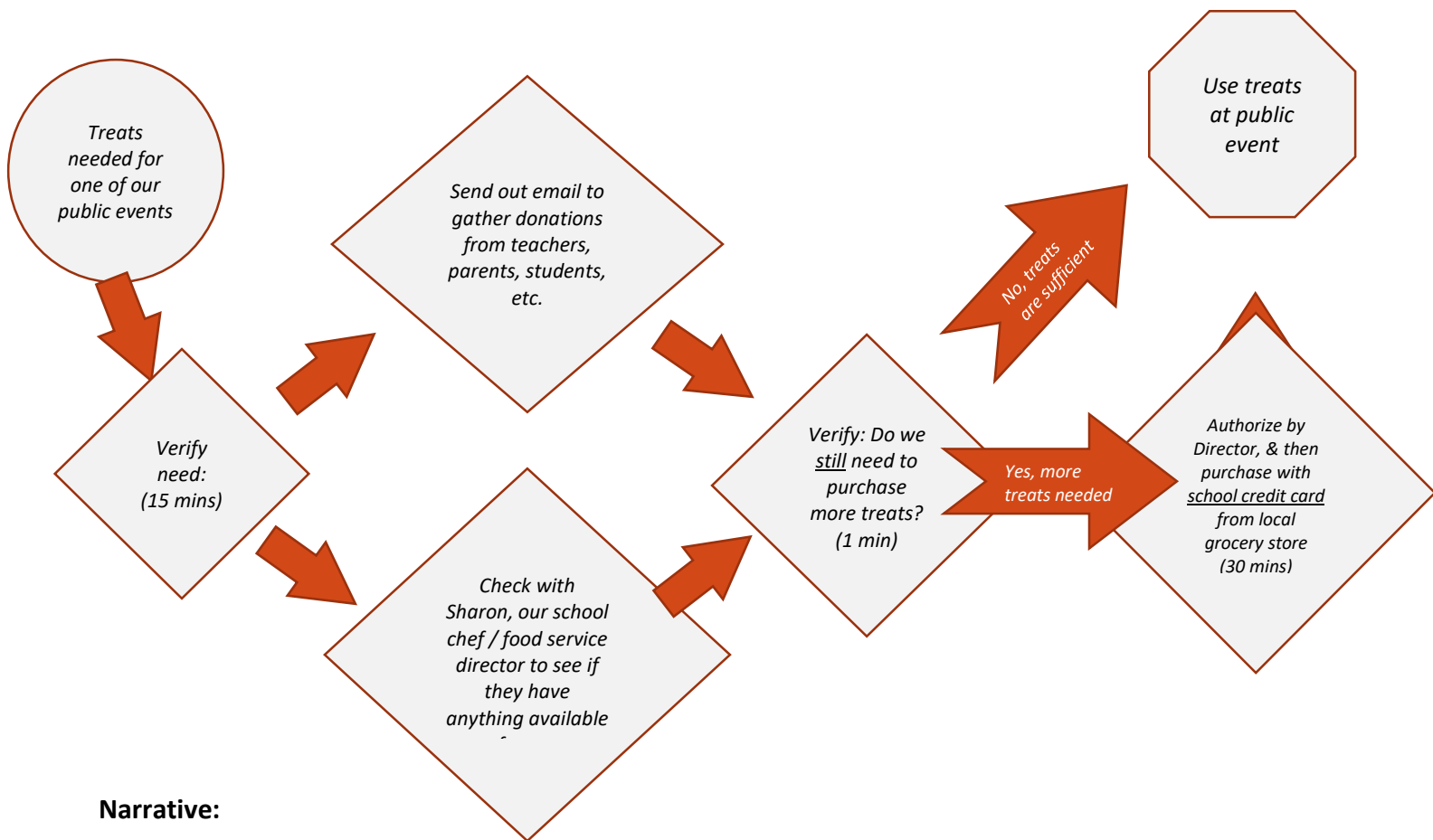
In the example above, the circle is the beginning step. The diamond indicates a decision point or action, and the hexagon is the end of the process. This type of arrow  simply indicates next step. This type of arrow  indicates a potential change in direction or action point. This flowchart was made in Word using Insert, then Shapes. Another option in Word is to use Insert, then SmartArt, then Process. You could also do an Internet search for free flowchart software for something like smartdraw.

### Instructions:

Investigate the procedures and guidelines for making purchases in your district. Make a flowchart that represents the process and maximum timeline for purchasing an item that costs \$99.00 or less. If the answers to the following questions are not answered within your flowchart, include a narrative explaining these questions.

1. In your flowchart, include the following:
  - a. What type of purchase does this represent?
    - i. credit card

- ii. purchase order
  - iii. open P.O. [line of credit with a vendor]
  - iv. district requisition [from an internal district supply warehouse]
  - b. How many approval points were there all the way up the line?
  - c. Who (which positions) had to approve the purchase?
  - d. What did you buy?
  - e. How long would it take to get the item [worst scenario]?
2. Is the process in your district an 'after the fact' approval process, or is approval required before the purchase is made?
  3. Describe the forms used in the process. Are they submitted electronically, hard copy, or both?
  4. What was most interesting information you found?



**Narrative:**

Let's imagine that as a teacher, I was hosting a **public event** here at our school. In order to make the event more enjoyable, we want to provide **snacks** to the patrons that attend the event. First, we would want to **verify that we don't already have some available snacks** for the event. I would check with fellow teachers, parents, etc., by sending out an email reminding everyone about the event, and inviting them to come and participate (and donate snacks if they can). I would also go and check with **Sharon** specifically, as she is our **Food Service Director**, and she would know if we had any leftover snacks from lunch, a previous event, etc., that we could possibly use.

If Sharon and / or the parents, teachers, etc. pull through with enough treats / snacks for the event, no purchase may be required! However, in the event that we **do** need to get more snacks, I would fill out a hard copy **purchase order form**, which would show our **director** what exactly I wanted to buy and for what, and assuming he agrees and approves (and signs the hard copy of the Purchase Order), I could then borrow the **school credit card**, and after making the purchase, submit the receipt with the completed **P.O.**, and then we'd have the snacks we need! This only ought to take an hour or two to complete all the way thru, although if the director is not available, then it might take up to 24 hours at the longest to complete. It seems to be relatively painless, yet I like how it maintains accountability for what is purchased and why. Almost always, approval is required beforehand. The exception to this is purchases from the classroom budget (a \$200 fund that each teacher can use each year).