



**SCHOOL DISTRICT OF OKALOOSA COUNTY  
TECHNICAL ASSISTANCE MEMORANDUM  
FINANCE**

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FINANCE TAM: 2022-006  
CONTACT: Vince Windham, Program Director  
Purchasing  
TELEPHONE: 833-5846

TO: School Principals and Department Heads  
FROM: Julie Perry, Interim Chief Financial Officer/Budgeting Director  
DATE: September 23, 2021  
SUBJECT: Purchasing Procedures

*Julie A. Perry*

As you know, if District purchasing policy is not followed, School Principals and/or Department Heads must present invoices to the School Board to request payment as Board Bills. At the Board Workshop on September 23, 2021, the School Board expressed concerns regarding the increase in the number of Board Bills being presented for payment, citing the following policy:

*Per School Board Policy 02-17(A)(2), "No employee shall obligate the Board without following this policy. Failure to comply may render the purchaser liable for payment."*

Please reiterate to your entire staff the importance of following our District's purchasing policies. All purchases must be made by one of the following methods:

- District Purchase Order – All District Purchase Orders must be created prior to making a purchase or making an obligation to purchase.
- Open (Blanket) District Purchase Order – An open purchase order is an open-ended contract to procure an indefinite quantity of commodities or services over an identified time period, as and when needed. The time period may not extend beyond the end of the fiscal year. This type of purchase order is intended to be used for purchases that will be made repetitively throughout the fiscal year and may not exceed \$5,000 per year unless it is based on an approved contract.
- District Purchasing Card – Please refer to the Purchasing Card Manual on the Finance website:  
<http://www.okaloosa.k12.fl.us/finance/Publications/Purchasing/Purchasing%20Card%20Manual%20-%20Effective%207-1-17.pdf>

Should you have any questions or require additional information, please contact Vince Windham, Program Director – Purchasing, at 833-5846.

Attachment

cc: Executive Staff  
Budget Bookkeepers/Secretaries