

North East ISD
Purchasing Cheat Sheet

Revised: 06/18/2024

Note: All Procurement BID regulations must be followed as well as all applicable travel regulations. **Enterprise Funds are included in the "Local" funds category.**

Type of Expenditure	Local	State	Federal	Campus Activity Funds	Student Activity Funds	Reference/Link
Apparel - Employee (Expected to be worn at specific times)	Not to exceed \$100 per person per calendar year (all sources)	Not Allowed	Not Allowed	Not to exceed \$100 per person per calendar year (all sources)	Not Allowed	IRS Guidelines
Apparel - Employee (NOT Required for job duties or specific times)	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed	IRS Guidelines
Apparel – T-shirts for Campus-based Student Groups (e.g., PALS, Lighthouse Teams, AVID)	Not Allowed	Not Allowed	Not Allowed	Only when associated funds are collected from students	Same as Campus Activity Funds and requires student approval	District Procedure
Appreciation/Recognition - students, staff, or volunteers	Must not be cash or gift card and must be less than \$25 cumulative per calendar year (all sources)	Not Allowed	Not Allowed	Must not be cash or gift card and must be less than \$25 cumulative per calendar year (all sources)	Same as Campus Activity Funds and requires student approval	IRS Guidelines
Athletic Scouting Travel (meals, mileage)	Must be outside normal work hours & max \$25/meal	Not Allowed	Not Allowed	May be used to reimburse local funds. Initial Reimbursement must run through travel reimbursement system.	Not Allowed	DEE(R)
Awards to Employees	Not to exceed \$100 cumulative value per individual, must establish written criteria and not be cash or cash equivalent	Not Allowed	Not Allowed	Not to exceed \$100 cumulative value per individual, must establish written criteria and not be cash or cash equivalent	Not Allowed	CH(R)
Awards to Students	Not to exceed \$150 cumulative per individual, must establish written criteria	Not Allowed	Not Allowed	Not to exceed \$150 cumulative per individual, must establish written criteria	Same as Campus Activity Funds and requires student approval	CH(R)
Baby Shower	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Gift of public funds are prohibited
Birthday Celebration	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Gift of public funds are prohibited
Boss's Day	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Gift of public funds are prohibited
Campus Improvement (such as plants, bulletin boards, signs, and flags)	Ok	Not Allowed	Not Allowed	Ok	Same as Campus Activity Funds and requires student approval	District Procedure

Type of Expenditure	Local	State	Federal	Campus Activity Funds	Student Activity Funds	Reference/Link
Conferences - Professional Development (enrollment and travel expenses)	Ok	Check the specific grant for allowability - Must prepay in local and use sub account 370	Check the specific grant for allowability - Must prepay in local and use sub account 370	Registration ok. Additional travel expenses must run through travel reimbursement system.	Same as Campus Activity Funds and requires student approval	Travel Checklist
Decorations (holiday, decorative knick-knacks)	Ok	Not Allowed	Not Allowed	Ok	Same as Campus Activity Funds and requires student approval	District Procedure
Donations for Charities	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Must be to 501(c)3	Gift of public funds are prohibited
Donations for Individuals	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Gift of public funds are prohibited
Field Trips - Students	Appropriate educational field trips	Check the specific grant for allowability	Check the specific grant for allowability	Appropriate educational field trips	Same as Campus Activity Funds and requires student approval	District Procedure
Food- Community	OK	Check the specific grant for allowability	Check the specific grant for allowability	OK	Same as Campus Activity Funds and requires student approval	District Procedure
Food - Offsite Staff Conferences - Professional Development	Out of town overnight stay required	Check the specific grant for allowability	Check the specific grant for allowability	Out of town overnight stay required	Same as Campus Activity Funds and requires student approval	Travel Checklist
Food - Staff Offsite	Written or Email Exec Staff Approval Required. Must be a business need. \$10/\$16/\$25 per person	Check the specific grant for allowability	Check the specific grant for allowability	Written or Email Exec Staff Approval Required. Must be a business need. \$10/\$16/\$25 per person	Not Applicable	DEE(R)
Food - Staff Onsite (Snacks & Treats)	Allowed - no more than twice a month	Not Allowed	Not Allowed	Allowed - no more than twice a month	Same as Campus Activity Funds and requires student approval	District Procedure
Food - Staff Onsite (Working Lunches and Faculty Meetings)	Must document purpose and attendees. Must be infrequent. \$10/\$16/\$25 per person	Not Allowed	Not Allowed	Must document purpose and attendees. Must be infrequent. \$10/\$16/\$25 per person	Same as Campus Activity Funds and requires student approval	CH(R)
Food - Student Offsite	Must be associated with school business student travel	Check the specific grant for allowability	Check the specific grant for allowability	Must be associated with school business student travel	Same as Campus Activity Funds and requires student approval	District Procedure
Food - Student Onsite	Must comply with school nutrition rules - must be noncompetitive	Check the specific grant for allowability	Check the specific grant for allowability	Must comply with school nutrition rules - must be noncompetitive	Must comply with school nutrition rules - must be noncompetitive	FFA(R)
Gift Card Purchases	Only as a student award - See Awards to Students	Not Allowed	Not Allowed	Only as a student award - See Awards to Students	Only as a student award - See Awards to Students	IRS Guidelines
Gifts - Faculty/Staff	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Gift of public funds are prohibited

Type of Expenditure	Local	State	Federal	Campus Activity Funds	Student Activity Funds	Reference/Link
Leases	Submit to Finance/Accounting for review and authorization	Not Allowed	Not Allowed	Submit to Finance/Accounting for review and authorization	Same as Campus Activity Funds and requires student approval	See Account 6269 Guidelines
Logoed Items "Giveaways"	Not to exceed \$10 value - only 2x per year for employees (all sources)	Not Allowed	Not Allowed	Not to exceed \$10 value - only 2x per year for employees (all sources)	Same as Campus Activity Funds and requires student approval	CH(R)
Memberships - Individual	Only if required for student participation	Not Allowed	Not Allowed	Only if required for student participation	Same as Campus Activity Funds and requires student approval	District Procedure
Memberships - Institutional	Ok	Not Allowed	Not Allowed	Ok	Same as Campus Activity Funds and requires student approval	District Procedure
Offsite Events - Faculty (Recreational) - see Wellness item below for BCBS funds	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Gift of public funds are prohibited
Offsite Events - Faculty (Staff Development)	Ok	Check the specific grant for allowability	Check the specific grant for allowability	Ok	Not Applicable	District Procedure
Plants/Flowers for Funeral	Employee or relative in the first degree - Not to exceed \$100 (cumulative)	Not Allowed	Not Allowed	Employee or relative in the first degree - Not to exceed \$100 (cumulative)	Same as Campus Activity Funds and requires student approval	CH(R)
Postage	Must Use District Mailing Services	Must Use District Mailing Services	Must Use District Mailing Services	Must Use District Mailing Services	Must Use District Mailing Services	District Procedure
Printing	Must Use District Print Shop	Must Use District Print Shop	Must Use District Print Shop	Must Use District Print Shop	Must Use District Print Shop	CPAA(R)
Rentals	Submit to Finance/Accounting for review and authorization	Not Allowed	Not Allowed	Submit to Finance/Accounting for review and authorization	Same as Campus Activity Funds and requires student approval	See Account 6269 Guidelines
Retirement Purchases (Does not include district-sponsored retirement reception)	Not Allowed	Not Allowed	Not Allowed	Retirement reception ok (see Appreciation & Recognition above)	Same as Campus Activity Funds and requires student approval	Gift of public funds are prohibited
Services - Contracted	Submit all contracts to the Procurement & e-Commerce for review and authorization. No RFPs or reimbursements allowed.	Check the specific grant for allowability	Check the specific grant for allowability	Submit all contracts to the Procurement & e-Commerce for review and authorization. No RFPs or reimbursements allowed.	Same as Campus Activity Funds and requires student approval	Independent Contractor Forms
Services - Facility (Repairs, etc.)	Must contact Facility Maintenance department	Must contact Facility Maintenance department	Must contact Facility Maintenance department	Must contact Facility Maintenance department	Must contact Facility Maintenance department	District Procedure
Services - Other (Repairs, Dry Cleaning, etc.)	Must Use PO - No RFPs or reimbursements	Check the specific grant for allowability	Check the specific grant for allowability	Must Use PO - No RFPs or reimbursements	Must Use PO - No RFPs or reimbursements	District Procedure

Type of Expenditure	Local	State	Federal	Campus Activity Funds	Student Activity Funds	Reference/Link
Services - Technology (Repairs, etc.)	Must contact Technology & Library Services	Must contact Technology & Library Services	Must contact Technology & Library Services	Must contact Technology & Library Services	Must contact Technology & Library Services	District Procedure
Social Functions - Faculty	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Not Applicable	Gift of public funds are prohibited
Social Functions - Students (Banquets, Dances, etc.)	Not Allowed	Not Allowed	Not Allowed	Ok	Same as Campus Activity Funds and requires student approval	District Procedure
Teacher of the Month/Year Award (Not including district wide teacher of the year program)	See Awards to Employees above	Not Allowed	Not Allowed	See Awards to Employees above	See Awards to Employees above	CH(R)
Technology	Requires pre-approval by Technology Services	Requires pre-approval by Technology Services	Requires pre-approval by Technology Services	Requires pre-approval by Technology Services	Requires pre-approval by Technology Services	Technology Pricing Page
Tips for Food Deliveries	Tip plus delivery must be no more than 20% or \$30 whichever is lower	Not Allowed	Not Allowed	Tip plus delivery must be no more than 20% or \$30 whichever is lower	Same as Campus Activity Funds and requires student approval	CH(R)
Travel – Employees (conferences, training, chaperone student trips) – SEPARATE from Field Trips	Ok	Check the specific grant for allowability - Must prepay in local and use sub account 370	Check the specific grant for allowability - Must prepay in local and use sub account 370	May be used to reimburse local funds - Initial reimbursement must run through travel reimbursement system	Same as Campus Activity Funds and requires student approval	Travel Checklist
Travel – Students (student groups, Fine Arts, Athletics) – SEPARATE from Field Trips	Ok	Check the specific grant for allowability	Check the specific grant for allowability	Ok	Same as Campus Activity Funds and requires student approval	District Procedure
Wall Paint	Must use district colors per Maintenance	Check the specific grant for allowability	Check the specific grant for allowability	Must use district colors per Maintenance	Must use district colors per Maintenance	District Procedure
Wedding Shower	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Not Allowed	Gift of public funds are prohibited
Wellness - Provided by BCBS to Campuses	Not Applicable	Not Applicable	Not Applicable	See specific guidelines provided by Risk Management	Not Applicable	Campus Wellness Funds Website