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THE ETHICS OF PURCHASING

in independent schools

Suggested Use: This document provides the foundation for the school to establish sound practices in purchasing that are ethical and aligned with the mission and values of the school. Incorporate it into your faculty and staff handbook along with your school's unique procedures of purchasing. Train and review with faculty and staff on a regular basis at the start of the school year or other times that are convenient, but at least once a year.

An independent school, driven by its mission, is deeply concerned with student outcomes: some measured while the student is enrolled, some measured over the course of a lifetime. Decisions students make are guided by the values a school helps to instill in them. Modeling ethical behavior and practices is an imperative of all adults associated with an organization charged with shaping the future.

A school's purchasing program should be grounded in the tenets of the school's mission and values. In order to uphold the highest values and support the school's mission, it is important for all faculty and staff members who purchase on behalf of the school to realize they have a fiduciary duty to protect the school's best interest in all business transactions. The individual purchaser is an ambassador for the school and should represent the integrity of the school. Interactions with current and potential suppliers must be handled in an ethical manner.

Many schools have decentralized the purchasing process and purchasing in independent schools is therefore a small part of many people's jobs, rather than a large part of a few people's jobs. In order to provide sound guidance to individuals entrusted to purchase on behalf of their schools, MISBO gathered a dedicated group of representatives to create a clear set of principles about purchasing in independent schools. This group reflected the myriad of voices involved at some level in schools: business officers, librarians, facilities professionals, and vendors. Over the course of several weeks, this group created the following document, approved by the MISBO Board of Directors in October 2017.

MISBO would like to thank the following for participating on the task force to develop these guidelines:

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PURCHASING ETHICS IN INDEPENDENT SCHOOLS

Below are ethical guidelines and considerations to share with anyone who makes purchasing decisions on behalf of the school. These should be useful to your most experienced purchasers or to those who have little to no experience in institutional purchasing.

VALUE

Endeavor to obtain the most value for your school regardless of the dollar amount of the purchase. Confirm value by including quality of products and level and quality of services provided by each supplier.

DUE DILIGENCE

Seize opportunities for assistance when determining needs at any dollar level. Utilize vendors who are recognized experts in their fields to help find solutions, while conducting as much internal discovery as possible and avoiding undue external influence.

CONFLICT OF INTEREST

Effectively mitigate your potential conflicts of interest by recognizing activities which might appear to compromise sound purchasing decisions.

RECIPROCITY

Acknowledge there may be opportunities for potential suppliers to be a close part of your school community. It is important to be conscious of and avoid any improper reciprocal agreements that would undermine ethical behavior or the values of your school.

IMPROPRIETY

Champion ethical behavior by not accepting personal gifts, gratuities, or other favors offered by suppliers.

CONFIDENTIAL AND PROPRIETARY INFORMATION

Maintain the confidentiality of all material you receive (pricing, bid details, and proprietary information) at all times. When seeking referrals from colleagues, help them remain ethical by requesting to focus on the vendor's solution for the school, avoiding pricing and other confidential information.

RESPONSIBILITY

Uphold the mission and values of your school by exercising reasonable care of your fiduciary responsibilities and the school's relationships with vendors and service providers.

EQUAL CONSIDERATION

Establish a fair and equitable process for soliciting bids including realistic timelines, deadlines, and communications schedules. Grant all competitive suppliers equal consideration. Encourage the use of diverse suppliers.

SUSTAINABILITY

Include sustainable and environmentally responsible choices in your purchasing decisions. Encourage purchasing from vendors that have a stated or written policy on sustainable manufacturing processes up and down the supply chain.

INFLUENCE

Maintain professionalism at all times so you may avoid any action that might negatively influence vendors or purchasing decisions.

FOSTER POSITIVE SUPPLIER RELATIONSHIPS

Encourage positive relationships by conducting business in an atmosphere of good faith. Promote a fair and accurate representation of your needs and wants. Request a fair and accurate representation of available products and services from suppliers or potential suppliers.

PROFESSIONAL COMPETENCE

Recognize not everyone at your school is experienced in institutional purchasing. Those new to this role should exercise integrity and good judgment while seeking knowledge from others within your school who may have more experience. If you have experience, be open to sharing ethical standards with faculty or staff new to this role.

COMMON SENSE AND MORE

Emphasize the standard of using a common sense approach in purchasing. Strive to work with vendors who exemplify ethical behavior by refusing to speak badly of other vendors offering similar products or services.



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