



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

FINANCE TAM: 2026-024
CONTACT: Vince Windham
Program Director - Purchasing
TELEPHONE: 833-7668

TO: School Principals and Department Heads
FROM: Julie Perry, Chief Financial Officer
DATE: December 2, 2025
SUBJECT: Software Purchase Procedures Reminder

Julie A. Perry

As a reminder, the District prohibits agreeing to vendor terms and conditions and/or privacy policies without first being vetted by our School Board Attorney. In addition, the State of Florida requires the Standard Student Data Privacy Agreement (SSDPA) to be completed if it is determined that software uses student personally identifiable information. For these reasons, the following software must be vetted by the District prior to purchase, regardless of whether the software is installed on a District device or personal device:

- All software purchased with District budgeted funds.
- All software purchased with Internal Funds.
- All software purchased by an outside support organization that uses student information.
- All software purchased with personal funds that uses student information.

Examples of software include but are not limited to web based, online subscriptions, site licenses, seats, downloads, online access, disk, non Classlink apps, or anything being purchased using object code 0365, 0691 or 0692. This includes renewals, free, free trials, or pilot programs.

The vetting process is explained below:

- Schools and departments will send all software quotes to Becky Perrin, Purchasing Buyer, to be reviewed prior to purchase. All software quotes must include a subscription term – start and end dates.
- Purchasing will review terms listed and/or referenced on the quote.
- The appropriate department, such as Curriculum, will determine whether or not the software product is approved for use.
- Information Systems will determine if the State of Florida required Standard Student Data Privacy Agreement (SSDPA) will be required. If required, Information Systems will work with the vendor to obtain the agreement.
- Typical lead time for the vetting process is a minimum of 3-4 weeks.

If the software is approved for purchase using District budgeted funds:

- A District purchase order must be entered in Focus.
- The term must be listed on the purchase order in the Comment for Vendor section.
- The approval must be included as backup.
- If the vendor does not accept purchase orders, contact Becky Perrin and request a special permission to use a District Purchasing Card.
- Software must be purchased on an annual basis; auto renewal is prohibited. Multi-year purchases, even if free, require School Board approval.
- Software purchases that were not vetted prior to purchase will not be reimbursed by the school or district.

If the software is approved for purchase using Internal Funds:

- The approval must be included as backup.
- Software must be purchased on an annual basis; auto renewal is prohibited. Multi-year purchases are not allowed.
- Software purchases that were not vetted prior to purchase will not be reimbursed by the school or district.

Please share this TAM with your staff. Should you have any questions or need further assistance, please do not hesitate to contact Purchasing at 833-7668.

cc: Budget Bookkeepers