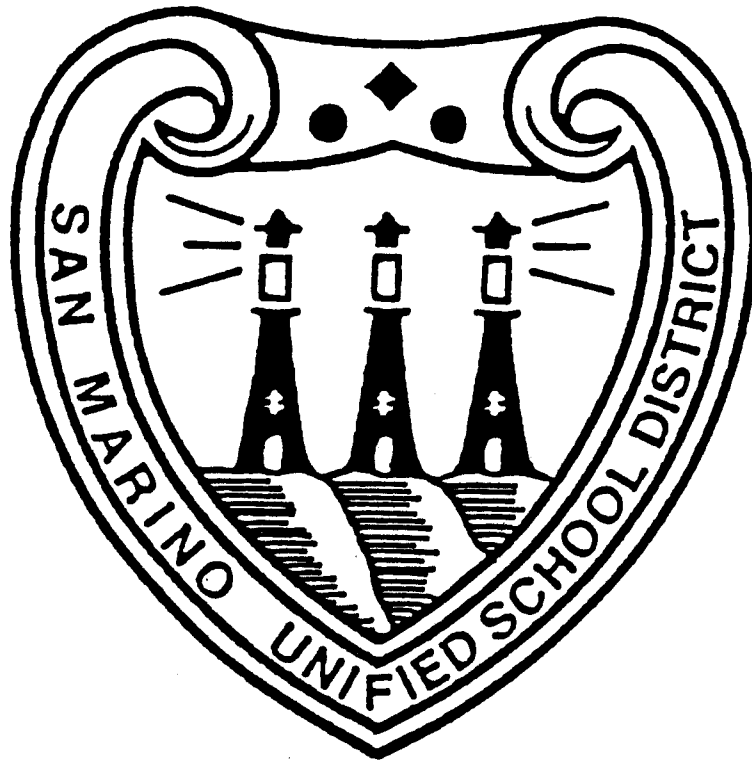


# San Marino Unified School District

## Purchasing Handbook



1665 West Drive  
San Marino, CA 91108  
Purchasing Department

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# **About Us**

**The Purchasing Department and Warehouse are centralized departments. We provide services of ordering and delivering products as well as all mail delivery.**

**As the Purchasing Manager, it is my goal secure low pricing while ensuring that quality products are purchased while following all local, state and federal laws related to school procurement. It is also my mission to acquire the products in an expeditious manner. I am available to all sites to assist with product suggestions and decisions. My duties also include, follow-up on orders that have not been received, and to negotiate returns when applicable. As needed, I am the back-up for the Warehouse Driver, which includes receiving and delivering products, and mail.**

**Our Warehouse Driver is responsible for receiving all merchandise ordered. He checks to ensure that all products are received correctly, and has the responsibility of contacting the vendor when there are discrepancies. Once items are received, he groups them together by site, and delivers them either the same day, or one day following receipt. His other duties include, mail delivery, Board Packet delivery, and from time to time, he assists the Food Services department with their deliveries.**

## **Who We Are**

**Ginger Peck, Purchasing Manager**

**(626) 299-7000 x-335**

**Pedro Burgueno, Warehouse Driver II**

**(626) 299-7000 x-333**

# 1. Technology Purchases and Repairs

The following describes the District's standards and processes for District technology purchases and repairs.

## **Technology Requisition Process**

All District and school site technology purchases must be aligned to district standards and approved by the Director of Technology. All supply and equipment orders, regardless of funding source, must be placed through the Purchasing office.

School sites and departments may establish an open purchase order with a pre-approved vendor, such as Office Depot, for emergency technology supplies. Emergency supply orders will be limited to \$100 per order and cannot be used for technology equipment or drives.

All orders to be funded with funding sources, other than the school site supply budget (i.e. PTA/PTSA, ASB, Boosters, Foundation, etc.), must be placed through the District's Purchasing office. With the exception of Foundation orders, all orders must be accompanied by a check from the organization for the total amount of the requisition prior to assignment of a purchase order number.

## **Technology Donations**

Due to issues of maintenance, support, and compatibility with standardized equipment, the District typically does not accept many donations of computers and used technology equipment. Members of the community wishing to contribute materially to enhance the availability of technology resources at a school site may donate brand new equipment that are the same make and model as the District's standard equipment, but the donation must first be pre-approved in writing by the Director of Technology and the Principal.

## **Technology Repairs**

All technology issues are to be reported to your site technician or via the technology repair work-order process. Your site technician, under the advisement of the Director of Technology will determine whether a repair or replacement needs to take place. Repairs are not to be contracted outside of the district without a valid purchase order and authorization by the Director of Technology prior to repair. Invoices submitted without prior authorization will be returned and denied.

# 2. Conference Requests/Hotel and Travel

To ensure that admission to a conference is made, please submit all necessary paperwork to the Instructional Services Department at least four weeks in advance of the conference, if not sooner. Along with your requisition, please include the conference request form, and the completed registration form.

It is the employee's responsibility to make all travel and hotel arrangements provided that the conference has been approved by the Board of Education.

### **3. Contracts**

All contracts or agreements must be approved by the Board of Education. Please submit a contract or agreement along with your requisition for District processing. (Do not sign any vendor's written contract or agreement.) Contracts can only be signed by the Assistant Superintendent of Business Services, Assistant Superintendent of Instruction, Assistant Superintendent – Human Resources, or the Superintendent.

### **4. Emergency Purchase Orders**

An emergency purchase order is an order for materials which are needed immediately due to unforeseen circumstances and there is insufficient time to go through the normal procurement process. Upon receipt of the approved buy out requisition, the Purchasing Department will generate a purchase order. You can pick-up the purchase order from the Purchasing Department or the purchase order can be faxed to the vendor on the same day. We are here to assist you!

### **5. Equipment - Repairs and Services**

When placing a service call for equipment covered under a maintenance agreement, it is recommended that you document the call and repairs by date to provide supporting documentation in the event you encounter difficulties with the equipment or vendor. For equipment not covered under a service agreement, submit a buy-out requisition to receive a purchase order for repair.

### **6. Order Check In**

All orders should be checked in as soon as possible after delivered to your site by the School Site Secretary to verify that the items and quantities received are correct. Report any discrepancies to the Purchasing Department immediately so that corrections or adjustments can be made. The school site is responsible for verifying the items delivered to the site from the warehouse. The warehouse will not be responsible for items missing from your order that have not been reported within one week of delivery.

### **7. Textbook Purchases**

As a result of the William v. State of California settlement, an amendment was made to §60119 which states that for core academic courses (mathematics, science, history-social science and English/language arts) sufficient materials must be available for each student.

All orders coded as textbook (4100 or 4110) must be pre-approved by the Assistant Superintendent of Instructional Services. This process is in place to ensure that if a district audit takes place, proof can be given that we have sufficient textbooks.

## 8. Order Changes / Cancellations – Returns

Once a requisition has been submitted, minor adjustment can be made via telephone. These adjustments include, deletion, or product stock number changes. All other changes require a new requisition. This ensures all proper authorizations are received.

If you need to return an item, **“DO NOT CONTACT THE VENDOR”**. Please call or e-mail the Purchasing Department with the purchase order number and the reason for the return. The Purchasing Department will ensure that proper return arrangements are made for replacements and credits. Please report return information to the Purchasing Department as soon as possible. Some vendors charge a restocking fee or will not accept a return after 30 days. The fee will be the responsibility of the site or department that initially placed the order. Purchasing will instruct the warehouse to pick up the item at your site.

## 9. Order Follow-Up

The Purchasing Department performs routine follow-ups of all purchase orders as time permits. If your order has not been received within a reasonable amount of time, please call the Purchasing Department with the purchase order number and the Purchasing Department will contact the vendor to check on the status of your order. This process eliminates duplicate shipments and returns.

## 10. Packing Slips – Invoices

On occasion, there may be a direct shipment to your school site or department, or materials may be picked up from a local vendor. Please indicate on the packing slip or invoice if all the material was received, sign, date and write the purchase order number on the paperwork. Please send all paperwork to the Purchasing Department for processing.

## 11. Taxes

### Sales Tax

**By Law**, we are **required** to pay **Sales Tax** for all **materials purchased** for the San Marino Unified School District. In addition to this statement, we must pay the tax rate applicable to Los Angeles County. This amount is **8.25%**.

Many vendors will tell you that they do not charge sales tax. However, we still pay it. If they won't collect it from us, we put the money in a holding account, and are responsible to pay the Franchise Tax Board any amount not collected by a vendor.

Your account will still be charged the invoice amount, plus the amount set aside to pay sales tax if not paid on the invoice.

## **11. Taxes (continued)**

### **Sales Tax**

Several districts are reporting that they are being audited by the State of California to ensure that this process is followed..

We will continue to “do the right thing” to protect the Students, Teachers, Staff and Community of the San Marino Unified School District.

### **Freight Charges**

I ask all vendors to quote prices delivered, (no freight charges), however, many of them do not comply. Please add freight charges to all of your purchases.

The law states that if a company uses their own delivery trucks, they have a right to charge sales tax on the delivery. If they use a common carrier (UPS, FedEx, etc...), their freight is not taxable.

The exception to this rule is when a vendor couples freight with handling. Once the word “handling” is included, then the entire freight charges are taxable whether they use a common carrier or not.

### **Warehouse Orders**

Sales Tax is already included in the price of Warehouse items. Do not add additional tax to the order.

## **12. Unauthorized Purchases**

The District will not reimburse you for supplies you purchase without a purchase order. We will consider these purchases a donation to the school.

If you use your own money to purchase supplies, you must insure that all items are certified **AP** or **CP NON-TOXIC**.

## **13. Vendor Solicitations**

Vendors and sales representatives are not to contact the school sites or solicit any District employee directly unless they are requested to do so by the Principal or the Purchasing Department. Vendors should go through the Purchasing Department for screening. Notify the Purchasing Department if you are interested in a demonstration/trial of equipment at your school site.

## **14. Warehouse Services**

The Warehouse will receive, process and deliver all warehouse stock supplies and materials ordered through the District Purchasing process. It is essential that purchase order deliveries be processed through the warehouse to ensure appropriate receiving and recording of the fixed assets inventory system. Receiving by the Warehouse will ensure a prompt delivery, reporting of discrepancies and prompt payment to the vendors. Please note that the Warehouse does not have room to store your school site or department materials or equipment.

## **15. Year End Deadlines**

In order to process orders and receive materials before the end of the fiscal year, deadlines are established. These dates ensure that orders can be processed, received and delivered by June 30<sup>th</sup>. A memo and e-mail will go out each year in mid March to notify you of these pending dates.

**The school site Secretary or Office Manager is the point of contact for each school site. Please route all communication through the school site Secretary or Office Manager. Having multiple calls from one site from different sources slows the process, and takes teachers away from their very important job... teaching the students.**



**One and Only  
Rule**



**Get to know your  
School site Secretary or  
Office Manager**



**Make him/her  
your best friend!**



**When in doubt...  
They will help you out!**

# Conference Requests

# HOW TO BE A GREAT TEACHER CONFERENCE

Be proactive in your quest to be a great teacher. By attending this wonderfully presented Conference, you and your student will benefit from the innovative methods taught by the Well reknowned Teacher of America, Mrs. Caroline Miller.

You will receive hand out materials as well as hear the methodologies of one of the great educators of our time.

This class will be held on Wednesday, November 8<sup>th</sup>, at the Hilton Hotel in Long Beach, California. Please register early as this Conference is expected to fill up fast.

Cost is \$125.00 per person and includes all hand outs and lunch.

| <u>Time</u>  | <u>Event</u>                        |
|--------------|-------------------------------------|
| 8:00 – 8:45  | Registration & Refreshments         |
| 8:45 – 11:30 | Guest Speaker, Mrs. Caroline Miller |
| 11:30 – 1:00 | Lunch                               |
| 1:00 – 3:00  | Break-Out Sessions                  |

This Conference is a once in a lifetime opportunity to gain the knowledge and excitement to carry you through many years of successful teaching.

Hope to see you there.



Name: \_\_\_\_\_

District: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone Number \_\_\_\_\_

Email Address \_\_\_\_\_

Purchase Order     Check     Visa # Do not use this method    Exp. \_\_\_\_\_

Make Purchase Order or Check out to:

HOW TO BE A GREAT TEACHER CONFERENCE  
1212 STREET NAME  
CITY, STATE, 12345-6789

**San Marino Unified School District  
Conference Request**  
(All Conferences Must be Approved Prior to the Conference Date(s).)

**Sample**

(Print) Attendee Last Name \_\_\_\_\_ First Name \_\_\_\_\_

School Site/Department \_\_\_\_\_ Position \_\_\_\_\_ Grade/Subject \_\_\_\_\_

Conference Title & Location \_\_\_\_\_ Sponsoring Organization \_\_\_\_\_

Conference Date(s) \_\_\_\_\_ Date(s) Substitute Required \_\_\_\_\_

Funding Source Title \_\_\_\_\_ Account # \_\_\_\_\_

How is this conference related to district, school, or grant goals? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Please complete cost estimates carefully. Attendees will be reimbursed for pre-approved expenses only up to the maximum of per diem allowances as defined by the current government rate for the city in which the conference is being held. Refer to (<http://policyworks.gov/org/main/mt/homepage/mtt/perdiem/perd04d.html>)**

\*Attach copy of registration form, flyer/brochure and a copy of Requisition (when appropriate)

Registration (req# \_\_\_\_\_) \* \_\_\_\_\_

Transportation (plane / train / bus) \_\_\_\_\_

Hotel \_\_\_\_\_

Meals \_\_\_\_\_

Other \_\_\_\_\_

Subtotal (excluding sub cost) \_\_\_\_\_

Substitute Cost \_\_\_\_\_

Total \_\_\_\_\_

**Business Office will complete these columns**

| Paid to Vendor | Reimburse to Employee |
|----------------|-----------------------|
| _____          | _____                 |
| _____          | _____                 |
| _____          | _____                 |
| _____          | _____                 |
| _____          | _____                 |
| _____          | _____                 |
| _____          | _____                 |

Conference Attendee Signature \_\_\_\_\_ Date Submitted \_\_\_\_\_

Approvals:

| Site Administrator |      | Program Administrator |      | Assistant Superintendent |      | Board |
|--------------------|------|-----------------------|------|--------------------------|------|-------|
| Initials           | Date | Initials              | Date | Initials                 | Date | Date  |
|                    |      |                       |      |                          |      |       |

Routing: Attendee; Site Administrator, Program Administrator, Assistant Superintendent; Business Office; confirmation to employee

- White - Business Office
- Yellow - Accounts Payable
- Pink - Attendee Confirmation
- Gold - Originator's Copy



**San Marino Unified School District**

1665 West Drive  
San Marino, CA 91108

(626) 299-7000 \* FAX (626) 299-7010

Requisition # **22887**

Purchase Order #

|  |    |                  |
|--|----|------------------|
| <b>Account #</b>                       | \$ | <b>Approvals</b> |
| 00.0-00000.0-00000-00000-0000-00000000 |    | Dept: _____      |
| _____                                  |    | Admin: _____     |
| _____                                  |    | PTA: _____       |
| _____                                  |    | Other: _____     |

Site/Department: YOUR SITE Date: TODAY'S DATE

Suggested Vendor: COMPANY NAME (OR AGENCY)

Address: MAILING ADDRESS

Phone: PLEASE INCLUDE FAX: PLEASE INCLUDE Contact: \_\_\_\_\_

| Item # | QTY | UNIT | CAT # & DESCRIPTION  | Unit Cost | Total  |
|--------|-----|------|--|-----------|--------|
| 1      | 1   | EACH | CONFERENCE REGISTRATION TO:<br><b>"HOW TO BE A GREAT TEACHER"</b><br><br>DATE: (DATE OF CONFERENCE)<br>LOCATION: HILTON, LONG BEACH<br>ATTENDEE: YOUR NAME | 100.00    | 100.00 |

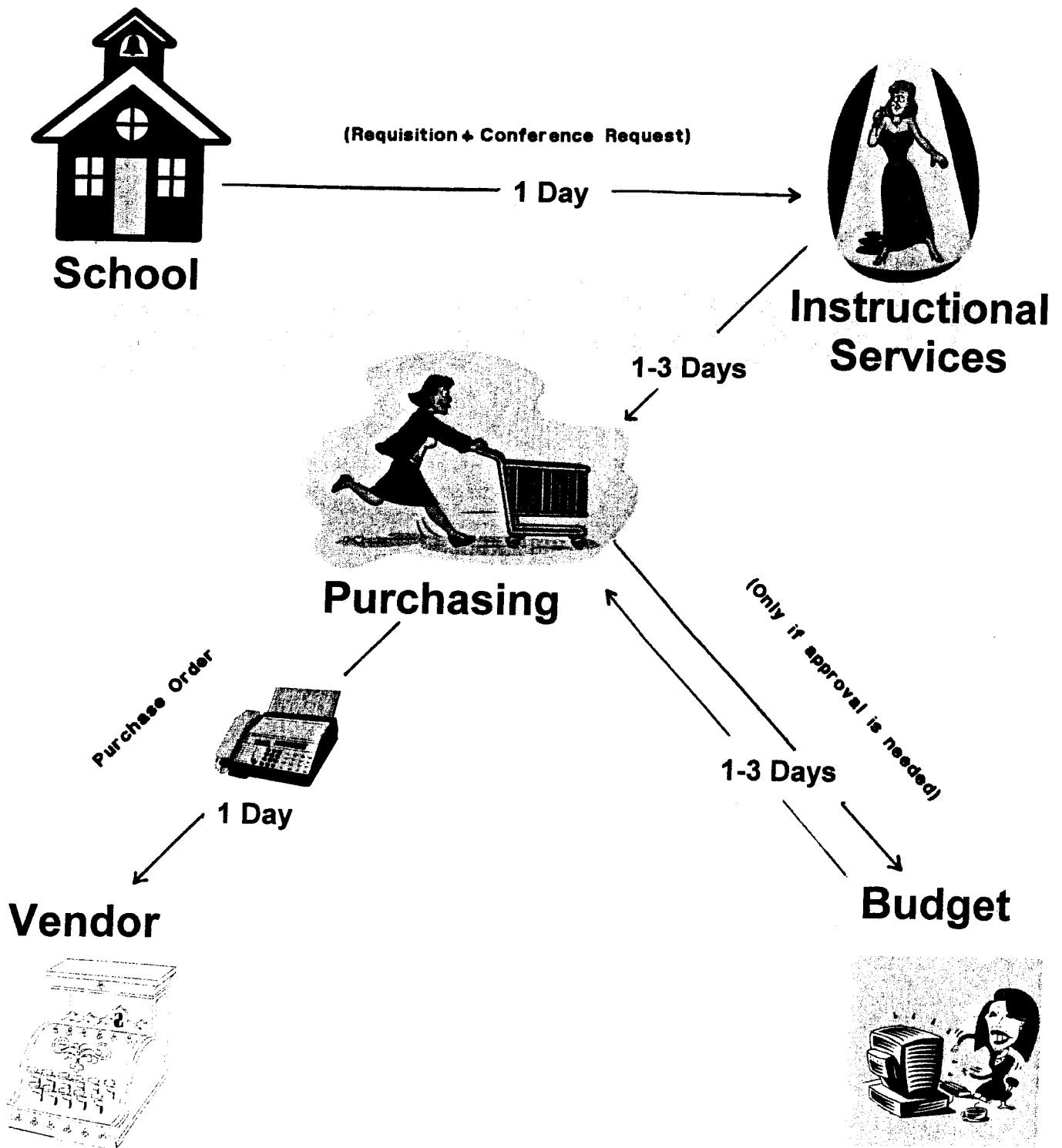
**Notes:**  
 USE THIS SPACE FOR SPECIAL NOTES.  
 EXAMPLE - VENDOR REQUIRES PRE-PAYMENT  
 PURCHASE ORDER MUST BE RECEIVED ONE WEEK  
 PRIOR TO CONFERENCE...

|                  |        |
|------------------|--------|
| <b>Sub-Total</b> | 100.00 |
| <b>Tax</b>       |        |
| <b>Freight</b>   |        |
| <b>TOTAL</b>     | 100.00 |

# CONFERENCES

Requisition → P.O. → Delivery

2 - 8 Days



# Requisitions



**San Marino Unified School District**

1665 West Drive  
San Marino, CA 91108

(626) 299-7000 \* FAX (626) 299-7010

Requisition # 13580

Purchase Order #

|                                       |    |                  |
|---------------------------------------|----|------------------|
| <b>Account #</b>                      | \$ | <b>Approvals</b> |
| 00.0-00000.0-00000-00000-0000-0000000 |    | Dept: _____      |
| _____                                 |    | Admin: _____     |
| _____                                 |    | PTA: _____       |
| _____                                 |    | Other: _____     |

Site/Department: YOUR SCHOOL Date: TODAY'S DATE

Suggested Vendor: VENDOR'S NAME

Address: VENDOR'S MAILING ADDRESS

Phone: PLEASE INCLUDE FAX: PLEASE INCLUDE Contact: \_\_\_\_\_

| Item # | QTY | UNIT | CAT # & DESCRIPTION        | Unit Cost | Total |
|--------|-----|------|----------------------------|-----------|-------|
| 1      | 2   | EACH | #12345, BOOK, SEE SPOT RUN | 4.00      | 8.00  |
| 2      | 1   | EACH | #67890, RUN SPOT RUN       | 5.00      | 5.00  |
| 3      | 10  | EACH | #10110, STUDENT WORKBOOK   | 1.00      | 10.00 |
| Sample |     |      |                            |           |       |

**Notes:**

USE THIS SPACE FOR INTERNAL NOTES:

-DELIVER TO ROOM 12 (MS. PECK)  
 -NEED BY MAY 3, 2004  
 -ITEMS FOUND IN SPRING 2003 CATALOG

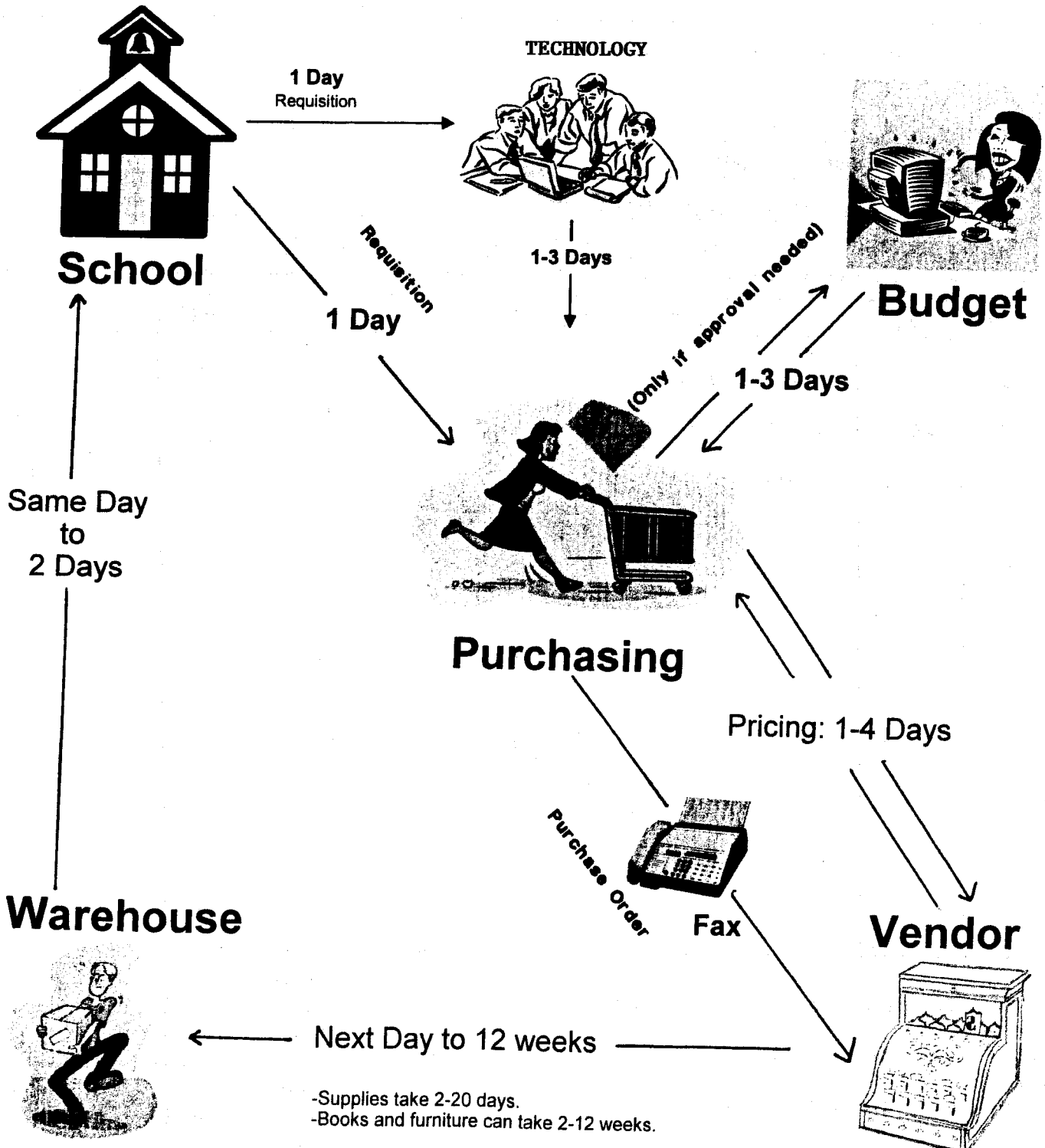
|                  |       |
|------------------|-------|
| <b>Sub-Total</b> | 23.00 |
| <b>Tax</b>       | 1.90  |
| <b>Freight</b>   | 2.30  |
| <b>TOTAL</b>     | 27.20 |

# Requisition

# P.O.

# Delivery

## Next Day to 12 Weeks

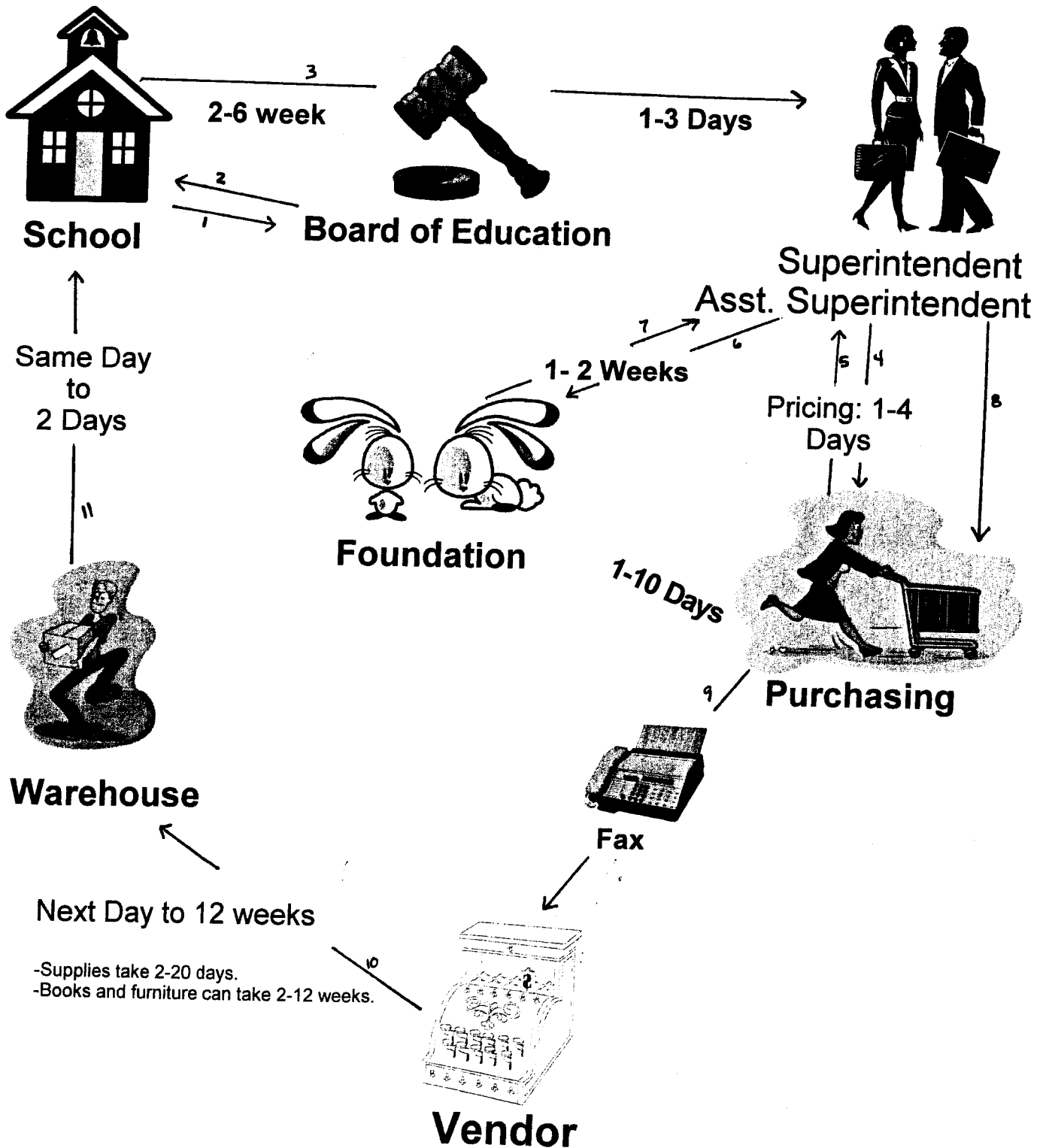


-Supplies take 2-20 days.  
-Books and furniture can take 2-12 weeks.

# Foundation Funded Orders

## Requisition → P.O. → Delivery

### 1 to 12 Weeks



-Supplies take 2-20 days.  
-Books and furniture can take 2-12 weeks.