“How To Do Business”

with

The Purchasing Department
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Foreword

This manual was developed by the Purchasing Department to assist you in doing business with us. We’ve included information on the Purchasing, Warehouse, Print Services and Mail Room departments. We encourage your comments and suggestions on how we can better improve this manual in future updates. You will find at the end of this manual, a questionnaire where we welcome your comments.

You can download this manual and other useful forms from the District Website, by going to the Purchasing web page at http://www.pusd.org/purchasing and click on the Download Forms link.
Purchasing Department - Services

MISSION

To manage and coordinate the procurement of the District’s supplies and services with integrity and professionalism, providing support, counsel and services to the organization and the community.

To negotiate, purchase and contract in an open, competitive, fair manner; securing maximum value for public funds through ethical, effective purchasing practices and high standards of excellence.

To listen, be objective, respectful, and patient; using what we hear and experience as motivation to learn and grow; and to enjoy our work with a spirit of teamwork, enthusiasm, and fun.

SERVICES AND ORGANIZATION

The Purchasing, Warehouse, Print Services and Mail Room goal is to assist the District’s overall educational process at all times, understand all conditions, and to ensure a constant supply of goods and services necessary to support all school sites and departments. To give prime consideration to the District’s best interests, while maintaining ethical relationships with all our customers.

Purchasing – Responsible for purchasing materials and services for the District

Warehouse – Responsible for inventory control, shipping and receiving for the District

Print Services – This service provides a solution with multiple options. The service enhancements include creation of an electronic document file cabinet for forms management, aggressive implementation of desk top document scanning to digitize documents and a flexible document pickup and delivery solution.

Mail Room – Responsible for all District business related U.S. Mail, Express Mail and District Inter-Office Mail.

Contact:

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Phone (909) 397-4800, Extension 3900
Fax (909) 397-5050
Email: nathaniel.holt@pusd.org
Responsibilities

The responsibility for purchasing materials and services for the District is centralized in the Purchasing Department. The Purchasing Director shall ensure that appropriate purchasing regulations and procedures are established and published. All District purchasing transactions shall be conducted in an efficient and business-like manner, and shall be based upon the highest standards of fairness, honesty and integrity.

The Purchasing Department is responsible for providing purchasing services to the District’s sites and departments. The primary elements of this service can be summarized as follows:

1. Purchasing the materials or services required.
2. Ensuring that the materials and services are available when required.
3. Purchasing materials and services at prices which are advantageous to the District and the user.
4. Purchasing materials and services without favor or prejudice.

The selection of materials and services to be purchased is the responsibility of the requisitioning site or department. The Purchasing Department shall have, however, the authority to make recommendations concerning the purchase of equivalent/substitute items when matters of economy are concerned.

The Purchasing Department assures the District’s sites and departments that they will purchase materials and services, which will satisfy the requisition’s requirements. However, the Purchasing Department reserves the right to purchase the required materials or services from vendors which they select and consider to offer the most favorable terms to the District.
Purchasing Department Team

DIRECTOR OF PURCHASING
NATHANIEL C. HOLT

PURCHASING SECRETARY
GRACE CABRERA, Ext. 3902

SENIOR TECHNICAL ASSISTANT – PURCHASING
MINA YOUNG

DEPARTMENT PHONE
(909) 397-4800, Ext. 3900

DEPARTMENT FAX
(909) 397-5050

BUYER – JESSICA CHASSAGNE, Ext. 3931
Supt’d. Office, Health Services, Pupil Resources, Child Development/Head Start, Copier Lease/Service, Maintenance Agreements, Safe Schools, Healthy Students, Costco, Conferences, Lodging, Field Trips (Admission Fees), Consultant Agreements

BUYER – IRA RAMOS, Ext. 3904
High Schools, VAPA, ROP, PAS, A&CE, Civic Center, Capital Facilities, M&O

BUYER – ESTHER CERVERA, Ext. 3930
Elementary Schools, School of Extended Educational Options (SEEO), Special Ed., Cell Phones/Related Equipment, La Verne Science & Technology

BUYER – ANN HARRINGTON, Ext. 3903
Middle Schools, Books, Subscriptions, Aux./PIO, Accounting, Fiscal, ITS, Instr. Svcs., Mail Room, Payroll, Personnel, Position Control, Purchasing, School Security

PURCHASING CLERK – MONICA LUNA, Ext. 3905
Facilities Related Agreements & Projects, Consultant Agreements Related to Facilities

MAILROOM – JAN ROBNETT, Ext. 3947 (TRANSCRIPTS – Ext. 3488)
Mail, Federal Express, Transcripts, Permanent Record Cards

WAREHOUSE SUPERVISOR – FRANK GOMEZ, Ext. 3700
Relationship with Vendors

All vendors shall be granted an interview upon request regarding their products or services. Requests for appointments shall be acknowledged and shall be granted as quickly as is possible, subject to departmental workload and availability of staff. Purchasing Department personnel, however, are not required to indiscriminately place their time at the disposal of a vendor.

The Purchasing Department will not extend favoritism to any vendor. All purchases will be made on the basis of quality, price, and delivery terms offered for required materials and services.

The Purchasing Department will acknowledge all letters, telephone calls, or other communications received from vendors.

Purchasing Department personnel shall not solicit funds or materials from vendors for any purpose.

No District employee shall accept gifts, personal loans, entertainment, or other special considerations from an individual or business organization doing business with the District.

DISTRICT BOARD POLICY #3315 AR (NOVEMBER 17, 1985)

Relations with Vendors

1. Within the time limitations of the purchasing agent and his/her staff all representatives of suppliers shall have a hearing relative to their products the first time they call.

2. The purchasing department shall not show favoritism to any vendors. Each order shall be placed on the basis of quality, price and delivery with past service being a factor if all other considerations are equal.

3. All letters, wires and other types of communications shall be answered or acknowledged promptly.

4. The purchasing department shall conduct all price adjustment negotiations. Vendors shall not make any exchanges except with the approval of the purchasing department.

5. The purchasing department shall not solicit funds or materials from vendors no matter how worthy the cause and shall discourage such activity on the part of all other departments within the district.

6. It shall be a regular part of the purchasing agent’s program to visit the supplier or manufacturer to become better acquainted with the manufacturing processes and methods of operations.

7. Vendors or their representatives are not permitted to show samples to students at the schools without the approval of the principal.

No employee shall permit any influence that could conflict with the best interest of the District, or prejudice the District’s reputation.

When possible, Purchasing Department personnel will visit vendors at their place of business to familiarize themselves with the vendor’s methods of operation, materials carried in stock, and to increase their knowledge of materials and services available to the District.

A Vendors Guide Brochure may be picked up at the Purchasing Department for further information.
Purchase Requisitions – Processing Priorities

It is vital to a smooth-functioning organization that Purchase Requisitions are processed in a timely manner. The following guidelines are established to aid Buyers in establishing priorities:

♦ Rush orders: process as soon as possible.

♦ All Purchase Requisitions: 3-4 day turnaround.

♦ Orders offered to vendors for informal bid: process within 5 working days.

♦ Annual Contracts, Open Purchase Orders: process within 3-4 days.

All delays that significantly exceed these processing guidelines are to be discussed with the Purchasing Director.

PURCHASE REQUISITION BASKET

Purchase Requisitions of urgent nature shall be tracked through the Smarte Online Requisition System, however, use of Paper Requisitions may be used that require approval from more than one department or end-user has no access to new funding account. From time to time, it is recognized that situations will arise where urgency will dictate immediate processing. In such cases and after the budget check is approved by the Business Services Fiscal Accounting Department, the completed Purchase Requisition is to be hand-carried to the Purchasing Department and left in the basket. The exact time by which the material is required must be noted on the Purchase Requisition. The term ASAP is NOT acceptable. An actual date and time must be entered.

Every effort will be made to process your Purchase Requisition requests immediately. If, for any reason, the Buyer assigned to your request has difficulty meeting the time requirement of the Requestor, the Buyer will promptly consult with the Requestor and will notify the Director of Purchasing or his designee.

Every effort should be made to minimize rush transactions, since they increase product and transportation costs significantly. This sort of order also results in an inefficient use of a Buyer’s time.
Purchase Requisition – Flow Chart

Tracing The Requisition And Purchase Order

1. **Requestor**: Determines what goods or services are needed. Complete the Purchase Requisition according to the instructions on the back of the requisition form. When the requisition is completed, have it approved by an Authorizer at your site/department retain a copy for your records and forward the balance to the Accounting Department or other Authorizer if necessary.

2. **Site or Department**: The site/department checks the requisition to confirm that the goods or services are needed and if in agreement, signs the requisition and forwards it to the Accounting Department or the Instructional Services Department, (Categorical Programs), as required.

2a. **Categorical/Restricted Accounts In-Box (Categorical Programs)**: If in agreement with the requisition, the Deputy Superintendent, Chief Academic Officer, or his/her designee approves it by signing in the additional authorization box and forwards the form to the Accounting Department.

3. **Accounting Department**: Verifies the correctness of the budget coding and availability of funds, initials in the budget approval box and forwards the requisition to the Purchasing Department, or to the Business Services-Fiscal Department, if requisition requires a budget override.

3a. **Fiscal Services**: (if budget override required) Initials requisition to verify approval and forwards to the Purchasing Department.

4. **Purchasing Department**: Reviews requisition for completeness and authorization.

4a. **RFP,RFQ**: obtains quotes or bids, if necessary (see item 4a in diagram), and determines which vendor to use based on quality, price, delivery and service requirements.

5. **Purchasing Issues P.O.**: A purchase order is issued which includes terms such as discounts, freight, tax, price, delivery dates, mode of shipping, etc. Copies of the purchase order are sent to the vendor, and to the Warehouse. All Initiator copies of the purchase order are sent to the Requestor.

6. **Vendor**: Ships merchandise to the Warehouse and mails invoices to the Accounts Payable Department.

7. **Warehouse/Receiving**: The receiving copy of the purchase order is forwarded to the Warehouse who is alerted to expect the shipment of material. When shipment arrives, the Warehouse checks condition and makes certain goods delivered correspond with goods ordered and with vendor packing list.

8. **Accounts Payables**: what is received on the receiving copy of the purchase order and delivers the material to the site and sends the receiving documents to Accounts Payable Department.
**Purchase Requisition – Preparation Procedures**

Sites and departments may request materials and services through use of the following forms:

1. **Purchase Requisition submitted through Smarte Finance**

   The Purchase Requisition is used to request the purchase of budgeted services, equipment and supply items. In order to ensure that Purchase Requisitions are processed in a timely manner, it is essential that the Purchase Requisition include the following information:

2. **Separate Purchase Requisitions should be submitted for each type of purchase, i.e. equipment, supplies, services, etc.**

3. **A brief description of the items required, including brand name/make/model information**

4. **Size of item required, if various sizes are available**

5. **Color**

6. **Options or accessories required**

7. **Quantity**

8. **Information regarding optional services required from the vendor, i.e. assembly, installation, training of personnel, etc.**

9. **Requirements for schematics, parts lists, training manuals, etc.**

10. **Information identifying trade-in items when equipment is to be purchased as a replacement item**

11. **Known sources of supply for the required materials or services**

12. **The budget account(s) to which the purchase should be charged**

13. **Online requisitions with insufficient back-up documents and/or board approval information will remain pending in the Purchasing In-Box until the appropriate documentation and/or board approval information is submitted to the Purchasing Department. (Please refer to the instructions on how to submit back-up documents to Purchasing.) Pending online requisitions will remain in the Purchasing In-Box for 3 business days. If no back-up documentation and/or board approval information is received at the Purchasing Department by the end of the 3rd business day, the pending online requisition will be routed back to the requestor. A note will be added in Smarte to the online requisition referencing the reason for return of the requisition to the requestor.**

For example, if the online requisition arrives in the Purchasing Department In-box on a Monday and it is lacking back-up documents and/or board approval information, it will remain pending in the Purchasing In-Box until Thursday. If said online requisition is still missing back-up documentation and/or board approval information at that time, it will be routed back to the requestor with a note in the system.
The Purchasing Department will no longer notify sites/departments when routing back a requisition due to lack of back-up documentation and/or board approval information. It is the responsibility of the site or department to check status of their online requisitions.

There are currently two methods of accessing the status of an online requisition:

1) Under “Purchase Req. Listing” – users can view their site or department’s list of online Requisitions, under the following headings:
   a) New Requisitions
   b) Awaiting Processing
   c) Completed

2) To look up a specific requisition under “Purchase Req. Listing” – enter the requisition number (R_______) in the “Requisition #” box and click on “Go” to view current location of online requisition.

In order to avoid the return of an online requisition to the requestor, it is highly recommended that sites or departments submit a copy of the back-up documents to the Purchasing Department via Inter-District mail the same day the online requisition is created and assigned an “R________” number.

**Checking on Status of Online Requisition**

Each site/department can look up the status of their online requisitions by going to the "Purchasing" tab. Then select the "Purchase Req" tab. Enter the R number in the blank space next to "Requisition #" and click on "Go". This method will pull up any online requisition as long as one knows the R number.

* "Current Step" field informs the site/dept originator and approver the current location of the online requisition. For example, "new purchase req" indicates that the online req is still with the originator and needs to be routed for approval. (see attached sample)

** "Req. State" is an additional field that has been added to inform the site/dept originator & approver the status of their online requisition. (see attached sample)

**The 9 Possible Messages that May Appear in the "Req. State" Field**

1. None - This means that there is nothing pending for the online requisition and it will be processed within the regular turn-around time.

2. Agreement Needed - This means that there is an agreement pending from the vendor before the online requisition can be processed.

3. Bond(s) Needed - This means that bonds for public works projects are pending from the vendor before the online requisition can be processed.
4. Insurance Cert Needed - This means that the insurance certificate is pending from the vendor before the online requisition can be processed.

5. Holding for Board Approval - This means that the online requisition is being held until the next Board Approval has taken place.

6. Completed W-9 Needed - This means the vendor listed on your site/dept online requisition is a new vendor. In order to issue a Purchase Order to a new vendor, Purchasing must have a completed W-9 Form from the new vendor. It is site/dept originator's responsibility to include a completed W-9 Form for a new vendor when submitting back-up documents to Purchasing.

7. Back-Up Docs Needed From Originator - This means that the corresponding back-up documents are pending from site/dept originator. Please see instructions on how to submit back-up documents to Purchasing Department. Requisitions lacking the appropriate back-up documents will be routed back to the site/dept originator after 2 business days.

8. Response Needed From Originator - This means that additional information or confirmation has been requested from site/dept originator and/or approver and a response is required before the online requisition can be processed. The online requisition will be routed back to the site/dept originator if there is no response after 2 business days.

9. Response Needed From Other Site/Dept. - This means additional information or confirmation has been requested from a site/dept. other than that of the originator and/or approver and a response is required before the online requisition can be processed (for example, confirmation may be requested from IT on technology that is new to the District.) The Purchasing staff who initiated the request for additional information or confirmation will be responsible for following up and obtaining a response in order to move forward on the requisition.
Purchase Requisition – Signatures

The Purchase Online Requisition System is designed to contain all of the necessary information and approvals relevant to the processing of procurement within the District. The completion of the Purchase Requisition by the Buyer also serves to create the formal Purchase Order that is the contractual commitment between the vendor and the District.

Under Board Policy AR3310(6); The following is stated:

“The District will not be responsible for payment for any merchandise or service(s) which is not ordered on the printed Purchase Order forms of the District or on contracts.”
Open (Blanket) Purchase Orders

An Annual Open (Blanket) Purchase Order is an agreement. The purpose of the Annual Open Purchase Order is to address small order concerns and to be convenient for users at the sites/departments. It allows the use of a single Purchase Order number for an entire period (annual fiscal year) and enables school sites and departments to deal directly with a vendor. Typically, this sort of agreement is made with local vendors.

A local vendor who provides small volumes of standard products on a regular basis may be issued an Annual Open Purchase Order—to cover all the small purchases made during a fiscal year. The vendor will be instructed according to the following:

Only a limited number of employees are authorized to purchase under an Open Purchase Order. Examples might be the principal, the assistant principal, the office manager and the school site specialist. The vendor is responsible for verifying the identities of those to whom he or she sells goods under the Open Purchase Order.

The maximum total dollar value of purchases against the Open Purchase Order is $10,000 per Purchase Order. It is the responsibility of the site or department to maintain a running total of their open purchases and transactions and to forward to the Accounts Payables Department, all receipts of the day’s transactions. Under no condition are capital goods, equipment or debit cards to be purchased with an Open Purchase Order. Under no circumstance is the value of a purchase to be spread over more than one Open Purchase Order. Once all funds have been spent on an Open Purchase Order, it cannot be increased beyond the original not to exceed dollar amount.

In order to ensure vendor payments are made in a timely manner, all original receipts slips for purchases made against any Open Purchase Order shall be submitted to the attention of the Accounting Department daily. When submitting the receipt the following information must be included:

- Authorized person receiving the materials must print and sign name on the receipt
- Include the P.O. Number for reference

Note: It is the site or department’s responsibility to ensure all receipts are submitted to the Accounting Department. It is also the site or department’s responsibility to ensure all funds as it relates to equipment, supplies, and service, are in compliance with the District’s Educational mission. Failure to follow the above process could result in the vendor restricting or denying other District purchases.

If vendor performance has been satisfactory, a new Open Purchase Order can be issued for the upcoming month or year. In no case is the vendor to carry over an Open Purchase Order for more than the specific period (one fiscal year).
Open (Blanket) Purchase Orders  

The formal Purchase Order issued to the local vendor should contain the following information:

♦ The period to be covered (one fiscal school year);

♦ Items or categories of items to be covered by the Open Purchase Order;

♦ Prices and pricing agreement;

♦ Terms of sale;

♦ Personnel (by name) who are authorized to purchase against the Open Purchase Order;

♦ Maximum dollar value that is not to be exceeded under the Open Purchase Order;

Items on an Open Purchase Order shall not be delivered to the District Warehouse. These items are to be shipped directly to the site/department. (If defined in the contract with the vendor or provider of services)

♦ There shall not be a purchase of any capital outlay equipment (i.e., computers), on an Open Purchase Order.

In all cases, Open Purchase Orders must have the approval of the Director of Purchasing or his or her designee, prior to their actual placement.

* Please note all terms and conditions between a vendor and Pomona Unified School District on the following page:
Purchase Order – Terms and Conditions

POMONA UNIFIED SCHOOL DISTRICT
TERMS AND CONDITIONS

1. The District will not be responsible for any goods delivered without a Purchase Order. The District is not responsible for goods delivered to District’s site or department other than the District Warehouse, located at 200 South Garrey Ave, Pomona CA 91766. Only the District’s Purchasing Department may request alternate delivery location (s). Any return items left in our District Warehouse beyond sixty (60) days will be donated to the Pomona Unified School District’s school sites or departments. ALL CALL TAGS MUST BE SENT TO THE ATTENTION OF THE DISTRICT WAREHOUSE SUPERVISOR AT THE ADDRESS STATED ABOVE.

2. Boxing, packing, or cartage charges shall be paid by vendor unless specifically authorized on the face of this order.

3. Cash discount period to purchaser will date from receipt of invoice, not from date of invoice.

4. In the event that seller fails to supply goods or services of suitable quality, quantity, or within the time stated on this order, the District may, at its option, cancel order or return merchandise at vendor’s expense and purchase like or similar suitable goods or services at a higher price with original vendor responsible to District for additional costs suffered.

5. The terms and conditions of sale as stated in this order shall govern in the event of conflict with any terms of seller’s proposal, and are not subject to change by reason of any written or verbal statements by seller or by any terms stated in seller’s acknowledgment. Seller must bring back orders and cancellations to the immediate attention of the Purchasing Office.

6. Purchase orders are valid only when signed by the Director of Purchasing, or the Assistant Superintendent of Business Services (Fiscal).

7. Seller represents and warrants that CAL OSHA Standards were adhered to and that no Federal or State Statute or Regulations nor Municipal Ordinance has been or will be violated in the design, manufacture, sale and delivery of any article or service sold and delivered hereunder. If such violation has or does occur, seller will indemnify and save harmless purchaser from all loss, penalties or the payment of all sums of money on account of such a violation.

8. Seller agrees not to release any advertising copy mentioning purchaser or quoting the opinion of any of purchaser’s employees, without written consent of the District.

9. The supplier shall comply with all equal employment opportunity provisions of federal, state, and local nondiscrimination laws, ordinances, regulations, and guidelines as may be applicable to the supplier.

10. Federal Excise Tax exemption is allowed school districts. Certificates will be furnished upon request.

11. HOLD HARMLESS CLAUSE
The vendor will hold harmless and indemnity the District Board of Education, its officers and employees, from every claim or demand, which may be made by reason of, (a) any injury to person or property sustained by the supplier or by any person, firm, or corporation employed directly or indirectly by the supplier or in connection with the supplier’s performance under the purchase order, however caused (b) any injury to person or property sustained by any person, firm, or corporation, caused by any act, neglect, default, or omission of the supplier or of any person, firm, or corporation, directly or indirectly employed by the supplier upon or in connection with the supplier’s performance under the purchase order (c) any liability that may arise from the furnishing or use of any copyrighted or uncopyrighted composition, secret process, or patented or unpatented invention, under the purchase order.

12. YEAR 2000 COMPLIANCE
The supplier will warrant that all hardware, software, and firmware product and equipment delivered under contract to the District shall be able to accurately process date data, (including, but not limited to, calculating, comparing, and/or sequencing) from, into, and between the twentieth and twenty-first centuries, and the years 1999 and 2000 and leap year calculations to the extent that information technology, used in combination with the information technology being acquired, properly exchanges date data with it. Year 2000 compliant products and services enable four (4) digit years versus two (2) digit years. This applies to both information technology products and services (computers and telecommunications) and n-information Technology products (e.g. facsimile machines).

13. CALIFORNIA EDUCATION CODE 17604
In accordance with California Education Code Section 17604, multi-year agreements are not a valid or enforceable obligation against the District until approved or ratified by motion of the Governing Board duly passed and adopted.
On-Line Supplies Ordering System

The Purchasing Department has implemented e-commerce solutions for ordering supply items. The on-line process gives the District’s sites and departments the capability to order supplies without delay, from their workstation. Supply orders are delivered to the sites and departments within 24 hours of placing an order on-line, in most cases. The following will need to be in place before the on-line order process can be utilized:

- Each user should be trained and certified in using the Internet.
- Each user must have Internet capability at their desktop.
- The user will need to submit a Purchase Requisition to the Accounting Department for budget approval.
- The Purchase Requisition should reflect your site/departments expected spending amount for supplies for the year. Furniture and equipment are not to be ordered on-line. Example of equipment would be small copiers, overhead projectors, etc.
- The Purchase Requisition must include the authorized user(s) who will be placing the order online. Please define location delivery site of item ordered.
- Items ordered online shall not be delivered to the District Warehouse. These items are to be shipped directly to the site/department. Items ordered online that are delivered to the District Warehouse cannot be accepted and will be refused by the Warehouse staff.
- Contact the Purchasing Department for any questions or concerns regarding using the on-line system.

The amount allowed for on-line Purchase Orders is $10,000.00 per Purchase Order. (This amount is identical to the Open Purchase Order dollar amount limit.) You may submit more than one Purchase Requisition for on-line ordering at one time. Once the Purchase Order(s) has reached the maximum amount for that Purchase Order(s), the Purchase Order(s) will be closed.

Please make sure to sign and date all packing slips and forward to the Accounting Department. The Accounting Department will need these in order to expedite payment. Failure to submit these packing slips may result in additional on-line orders being delayed.

SELECTED VENDORS

The following vendors can be used for on-line ordering of Office Supplies, Medical Supplies and Physical Education Equipment:

Office Supplies

Office Depot
3366 East Willow St.
Signal Hill, CA  90806
Customer Service (800) 420-7111, Ext.5275
www.officedepot.com

Delivery time: 24 hours of placing an order, if order is placed on the system before 4:00 p.m.
On-Line Supplies Ordering System

Manipulatives

Lakeshore Learning Materials
2695 E. Dominguez St.
Carson, CA  90810
Customer Service (800) 428-4414
\www.lakeshorelearning.com

Science Equipment

Fisher Science
www.fisheredu.com

Medical Supplies

Physician Sales & Service, Inc.
Cell (949) 632-4720
Fax(909) 494-6377
www.mypss.com

P.E. Equipment

Sport Supply, Inc.
12640 Moore St.
Cerritos, CA  90701
(800) 435-3333
Fax # (310) 921-2515
www.bsnsport.com

Delivery time:  4 to 7 working days, if order is placed on the system before 5:00 p.m.

Note: Please see the Purchasing Department’s Web Page on the Pomona Unified School District’s Web Site for links to the above vendors. (www.pusd.org/purchasing)
Smarte Finance On-Line Purchase Requisition System

The on-line Purchase Requisition module provides electronic approval and gives the end user access to create on-line Purchase Requisitions. The on-line Purchase Requisition module gives each user the ability to view the status of their Purchase Requisition(s) at any time.
Smarte Online Purchase Requisition System – Reminder of Instructions for Submitting Online Requisitions and Back-Up Documents

Online Requisition Submission Process for Business Services - Accounting:

In order to make the processing of on-line requisitions more efficient and effective for everyone involved, please ensure that in the Comments/Notes section of your online requisitions you include the following information:

- Make it very clear what the item(s) are being purchased for
- Indicate whom the item(s) are being purchased for (i.e., staff, students, parents, etc.)
- Indicate what population is being served by the purchase (i.e., regular education K-12, summer school, etc.)
- Indicate what activity is being performed (i.e., indicate if it is for a particular type of testing or program)
- Indicate where the item will be used/placed at your site (i.e., classroom, office, etc.)
- If this information is missing, your requisition will be routed back to your site, which will delay the processing of it.

Online Requisition Submission Process for Business Services - Purchasing:

- All Line Items must be typed onto the body of the Online Purchase Requisition. Please do not use “see attached list” as one single line item for an entire order. (Quotes or printouts of product description can be submitted as back-up documents.) Requestor must also provide description of item(s) being ordered.

  Examples: books, magazine subscription, charts, maps, pencils, computers, software licenses, admission tickets, conference registration, agreement, etc.

- All Line Items must be typed onto the body of the Online Purchase Requisition. Please do not use “see attached list” as one single line item for an entire order. (Quotes or printouts of product description can be submitted as back-up documents.) Requestor must also provide description of item(s) being ordered.
Smarte Finance On-Line Purchase Requisition System

Instructions

When submitting Back-Up Documents, Online Purchase Requisition Number AND your Site or Department Name must be written at the top of each page of the back-up documents corresponding to the online purchase requisition.

Examples: R1300209 – Instructional Services Department
or
R1300210 – Alcott Elementary School

Back-Up Documents must be submitted to the attention of the Purchasing Department via one of the following methods:

- District Mail
- Fax (909 397 5050)
- E-mail (Mina.Young@pusd.org).

For Conferences: body of online requisition must contain names of District approved participants, Board Approval Date, date(s) of conference, location, pricing, and method of payment information as it relates to the conference.

- Back-up documents for conferences must include completed registration forms from the vendor (including vendor phone # and fax #) for each District approved participant referencing the above information.

For Hotel Accommodations: body of online requisition must contain names of District approved guests, the name of the District approved conference/function they are attending, Board Approval Date, number of nights and days the individual will be staying (with the arrival and departure dates), room rate, tax rates, and any other applicable hotel fees.

- Back-up documents for hotel accommodations must include the hotel reservation confirmation from the hotel (including vendor phone # and fax #) for each District approved guest referencing the above information.

For Field Trips: body of the online requisition must contain the number of District approved students and adults attending, date of trip, pricing, and method of payment information.

- Back-up documents for field trips must include reservation confirmation from vendor (including vendor phone # and fax #) referencing the above information AND the name of your site must be listed on the reservation confirmation.

- Please note: Cabinet approval is the responsibility of site.
Smarte Finance On-Line Purchase Requisition System

Instructions

- For Agreements: body of the online requisition must contain the brief description of the agreement, term of agreement, not-to-exceed dollar amount, Board Approval Date.
  - Back-up documents for agreements must include copy of executed agreement and copy Board Agenda Item.

- If a vendor cannot be found in the vendor file and you are using the "suggest vendor" option, please have the vendor complete a W-9 form (see attachment) and submit it as part of your back-up documents.

- Online Purchase Requisitions with insufficient back-up documents will be returned to requestor for correction. Requestor will be notified and given 3 business days to provide the appropriate back-up documents before the Online Purchase Requisition is routed back to requestor for correction.

- For description of required back-up documents as it pertains to Conferences, Lodging, Fieldtrips, Agreements, etc., please refer to the "How To Do Business with Purchasing Manual" on the Purchasing Department website at www.pnud.org (Departments, Business Services, Purchasing).

- ANY INCOMPLETE INFORMATION OR MISSING PAPERWORK WILL DELAY PROCESS OF YOUR REQUISITION.
District Standardization

The implementation of a District standardization program begins with a District-wide inventory of installations and applications of commonly used items. This inventory should be accompanied by an analysis of each application, noting specific requirements at each installation or use. In each instance, a basic function for each application must be identified. Following functional analysis, common requirements should be consolidated to form the basis for District standardization.

Examples of the above process might include such diverse issues as standardizing of parts used in the manufacture of several District products, establishing District standards for same-function manufacturing machinery or vehicles or material-handling equipment, selecting District standards for office furniture or office products as inexpensive as pencils, etc.

In each case, the function to be provided must be established. For example, the function of pumps is to move liquids from one place to another; that of a pencil, to make marks on paper. Then, the various products currently available from the marketplace should be analyzed to select the one that best serves the specific District need. Does the fancy two-tone red-and-blue pencil make better marks on paper than the plain yellow one? If not, then it makes no sense to pay more for the red-and-blue one.

This selection process does not rule out the possibility that none of the currently available products fully meet District requirements. In such a case a custom-made product might become the District standard. It should be noted, however, that every effort should be made to find already-available products before deciding on a custom product. Standard products are almost always less expensive than are custom products, with industry standard products being typically the least expensive.

- The implementation of a District standardization program and the selection of District standards results in at least the following benefits:
  - Maximizing purchase leverage by consolidating volumes, which typically results in lower prices or lower total cost to the District;
  - Improved vendor service and performance from reduction of the supply base;
  - Reduction of inventories and inventory investment because a less diverse group of machines or equipment is needed;
  - Improved inventory performance because the District can afford to maintain deeper inventories of fewer product;
  - Interchangeability benefits exist.
• Nonstandard product should never be replaced with another nonstandard. As attrition and where it necessitates replacement, the District standard should always be used. The exception to this Rule would be in a situation where a new design of a manufactured product allowed the adoption of a standard part and the remaining inventory of nonstandard parts could be disposed of (returned to vendor for full credit) without loss to the District.

The District has standardized on the following items:

- Cell Phones and Related Equipment
- Copiers
- Computers
- Printers
- Office Furniture
- Classroom Furniture
District Cell Phone Order Process

The District vendor for Cell Phones is based on the intended use or need of the phone.

There are several types of phones and rate plans available to approved District staff requesting District cell phones. (Please check the District website under the Purchasing Department for current rate and plans.)

Once cell phone and monthly call plan is chosen the following will occur:

♦ Purchase Requisition* is submitted from the site and/or department with the following information;
  • Type of cell phone
  • Monthly calling plan
  • Name of person assigned to cell phone;

*Note: If a new cell phone and/or accessories are being purchased, a separate Purchase Requisition must be submitted.

♦ Once received, your Purchase Requisition is then processed and a Purchase Order will be created;

♦ Cell phone will come activated with cell phone number (for new cell phone purchase). Replacement phones will keep same number.

♦ Once the Purchasing Department verifies the cell phone is activated, the site or department will then be contacted for pick up.

♦ Individuals picking up cell phones must sign for it on the Cell Phone Pick-up Form. If phone is a replacement for a broken or old phone, that phone must be returned to Purchasing to be recycled or disposed of properly.

♦ If a District cell phone is lost, please contact Purchasing immediately at 909 397-4800, Esther Cervera, Ext. 3905 or 3900.

♦ The District does not allow text messages unless approved by the site or department administrator.

Cell Phone repairs will be ready for pick-up within two weeks. New equipment will also be ready for pickup within two weeks after received by the warehouse.

Please Note: Effective July 1, 2008 The New Senate Bill 1613 states: “A person shall not drive a motor vehicle while using a wireless telephone unless that telephone is specifically designed and configured to allow hands-free listening and talking, and is used in that manner while driving.” All new and prior purchased District owned cell phones must follow and adhere to SB1613. It’s the Law. No exceptions.

Annual Renewal of Cell Phones
Annually, between the months of March – May, the Purchasing Department sends a renewal letter to sites/department that has cell phones. The letter shall include current cell phone information and any changes should be included. All sites or departments that have employees with District cell phones must submit a Purchase Requisition for each fiscal year. Include any changes made during the year, i.e., add-ons, any cancellations, upgrades, etc. Costs shall remain the same unless otherwise stated by the Purchasing Department.
The Purchasing Department shall keep a cell phone log that includes each user, site and/or department, and cell phone number. A copy of this log shall be kept on the desk. Any one calling for an employee's District cell phone number shall be directed to the Superintendent’s office.

* Note: If a District provided cell phone is used for personal use, it is the user’s responsibility to reimburse the District.

Contact the Buyer responsible for cell phone and equipment for current quotes and available equipment.
Copiers – Purchase Process

If the site or department needs help in selecting a copier, they may contact the Purchasing Department to arrange for the vendor representative to go out to the site, survey their needs and submit a proposal to the Purchasing Department for the sites or departments approval. Once the site or department selects a copier, the following steps should be taken:

♦ Determine need for copier(s).

♦ Review needs and specifications with Buyer regarding the brand, model, copiers per minute and/or any other technical requirements.

♦ **Outright Purchase:** Verify funding availability with Budget Control (Accounting Department). Funding must cover power requirements, maintenance agreement, overages and supplies, if needed, and not included in maintenance agreement.

♦ Once funding is verified a Purchase Requisition(s) for the copier(s) and related equipment, to the Accounting Department for budget approval. Once approved, the Accounting Department will forward the Purchase Requisition to the Purchasing Department for processing. Note: A separate Purchase Requisition(s) must be submitted for the maintenance service.

Please see attached Copier Acquisition Form at the end of this section, as it relates to ordering copiers. If any questions, please call the Buyer for copier purchases, services and maintenance, at ext. 3931.

♦ Purchasing issues Purchase Order(s).

♦ Buyer will arrange the delivery of copier(s) and will confirm date and time of installation with the site or department.

♦ **Prior to ordering copier(s), it is the responsibility of each site/department to notify the Maintenance & Operations Department to review power source requirements prior to Purchasing a copier. Please reference the Maintenance & Operations Department’s work order process.**
ANNUAL RENEWAL OF COPIER MAINTENANCE AGREEMENTS

Annually, between the months of March – May, the Purchasing Department sends a maintenance renewal letter to sites/departments who have copiers. The letter shall include current copier information. All sites or departments that have copiers must submit one Purchase Requisitions each fiscal year for annual maintenance and overages. (Be sure to use correct funding accounts for maintenance and overages)

If copier is to be used for surplus, make sure to submit an RDS Warehouse Department to arrange pick-up before the delivery of the new copier.

It is the responsibility of the site or department to schedule training for the new copier with the copier company.

Based on a site/department’s needs, it is always highly recommended that the site/department look at the comparison between a copier and a duplicator machine when looking at purchasing a new copier. Please contact the Purchasing Department for more information on cost comparisons.
Copier Acquisition Check List

Date: ______________________________

Location: ____________________________

Requisition No. ______________________

Quantity: ________________

Configuration meets District Standard ……………………………Yes _____ No______

Copier Location in an approved area? ……………………………Yes _____ No______

Power requirements have been approved by Maintenance & Operations….

Yes ____ No _____

Other Comments:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

I certify that all the above check marked items have been met and my site is prepared to receive the copier(s) as soon as they are received and checked in by the Warehouse.

_________________________________________    __________________________
Site/Department Administrator Signature                       Date

__Purchasing use only__

MAC Address ____________________________

Model Number ____________________________

Serial Number ____________________________
Furniture – Purchase Process

The District standard will include two types of furniture designs:

**Systems Furniture** – Can only be utilized in an open space area. Everything is integrated as one component attached by panels that cannot stand-alone by itself.

**Stand-Alone** – Freestanding desk, credenza, bookshelves, etc.

**Note:** Seating was not included in this section, due to each employee’s personal preference.

**INITIAL PROCESS**

The Buyer will set up a meeting with the site or department and the Furniture Company, to assist the site or department in selecting office furniture that will meet their needs. A second meeting may be necessary if the Furniture Company’s designer must measure work area.

Information gathered at the meeting is taken back with the vendor to assess design drawing (if applicable) and costs.

The vendor will submit a quote and design drawing (if applicable) for approval. If approved, the site or department will sign-off on design and layout. **Note:** this process may take anywhere from two days to two weeks, depending on additions, changes or revisions to the quote.

Furniture is actually made to order and takes up to 6 to 8 weeks (predicated on furniture not in stock) for delivery from the time the Purchase Order has been faxed and confirmed by the vendor.

*The next page lists a typical standard classroom set-up.*
### Furniture – Purchase Process

**STANDARD CLASS ROOM SET-UP**

#### Teacher Furniture (All Schools)

<table>
<thead>
<tr>
<th>Item</th>
<th>Color</th>
<th>Qty.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher Task Chair</td>
<td>AB Confetti Gray</td>
<td>1</td>
</tr>
<tr>
<td>Teacher Desk</td>
<td>Gray Nebula/Char</td>
<td>1</td>
</tr>
<tr>
<td>42”H Steel 3 Shelf Bookcase</td>
<td>Light Gray</td>
<td>1</td>
</tr>
<tr>
<td>4 Drawer Vertical Letter Size 28”</td>
<td>Light Gray</td>
<td>1</td>
</tr>
<tr>
<td>30x60 Activity Table</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Elementary School

<table>
<thead>
<tr>
<th>Item</th>
<th>Color</th>
<th>Qty.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Place Student Desk</td>
<td>Gray Nebula/Char</td>
<td>30</td>
</tr>
<tr>
<td>Student Chair K-1 Grade</td>
<td>Green</td>
<td>30</td>
</tr>
<tr>
<td>Student Chair 2-3 Grade</td>
<td>Navy</td>
<td>30</td>
</tr>
<tr>
<td>Student Chair 4-5-6 Grade</td>
<td>Wine</td>
<td>30</td>
</tr>
<tr>
<td>Storage Cabinets 72x18x36</td>
<td>Light Gray</td>
<td>2</td>
</tr>
<tr>
<td>48x72 Kidney Table</td>
<td>Gray Nebula/Char</td>
<td>1</td>
</tr>
</tbody>
</table>

#### Middle School

<table>
<thead>
<tr>
<th>Item</th>
<th>Color</th>
<th>Qty.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair Desk (Soft Shell)</td>
<td>Blue/Sandstone</td>
<td>30</td>
</tr>
<tr>
<td>Student Chair</td>
<td>Wine</td>
<td>30</td>
</tr>
</tbody>
</table>

#### High School

<table>
<thead>
<tr>
<th>Item</th>
<th>Color</th>
<th>Qty.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chair Desk</td>
<td>Blue/Sandstone</td>
<td>30</td>
</tr>
<tr>
<td>Student Chair</td>
<td>Wine</td>
<td>30</td>
</tr>
</tbody>
</table>
Computers – Purchase Process

The site or department determines the need for computers.

The site or department verifies funding availability with Budget Control (accounting).

Please review any needs for security, power requirements, furniture, software and lock-down devices with the site/department technician or the Information Technology Department. The following is an example of equipment that may be needed:

- Speed, memory, ram, hard drive and other technical requirements

**COMPUTER AND LAPTOP PURCHASE STANDARDS**

If ordering laptop or desktop computers the site or department must identify what they are being used for. The Purchase of Apple computers will be used for instructional use only. (See Exhibit N at the end of this manual.)

Site or department verifies necessary electrical power or indirect access points requirements. Please contact the Maintenance & Operations Department and the Information Technology Department for their procedures on this process.

**LOCKDOWN DEVICES**

In an effort to reduce asset losses within the District, physical anti-theft equipment must be installed on all computer and peripheral equipment with a replacement cost value of over $500. (If applicable)

At the time a Purchase Requisition is submitted for new school equipment/asset (i.e. computer, printer, scanner), at the same time, a separate Requisition must also be submitted for the “lockdown” device.

The required areas for lockdown devices are for site/department computer labs or fixed classroom use of computers. The site/department administrator shall determine if there is a need for lockdown devices in areas other than the required areas as stated above.

Assets will not be delivered to the school site/department until the anti-theft hardware as been ordered and installation of the device(s) has been scheduled.

It is the site’s responsibility to contact the Information Technology Department or site/department technician for lockdown installation schedule.

If for some reason the Information Technology Department is unable to accommodate your installation request, the District has an approved vendor for lockdown devices. Please contact the District Buyer for your site/department to obtain pricing and ordering information.

It is recommended that if a site/department has current equipment/assets that do not have “lockdown” devices in place, that “lockdown” devices also be installed on this equipment.

Note: Please check with your site or department Purchase Buyer for current devices.
Computers – Purchase Process

In order to assure that the computer(s) and related technology equipment ordered by each site and received at the District’s Warehouse Department is properly delivered to your site, the following e-mail message shall be forwarded to each receiving sites Principal or Program Administrator from the District Warehouse:

Good afternoon,

The following computer(s) and/or related equipment order has been received and is ready for delivery. Please send an e-mail verification stating that these computer(s) and/or related equipment are for administrative use or that you have all the necessary lockdown devices ready for installation. We will only deliver to your designated safe-room, of which has been verified by the District’s School Security Department. Please note all delivery verifications must be signed by the site Principal, Assistant Principal or a Program Administrator (example, Child Development or Special Education). Please also note, all Principals, Assistant Principals or Program Administrators must be present during the process of signing, and witness and validate all deliveries. There will be NO EXCEPTIONS!!! Thank you.

Please contact the Warehouse at 909 397-4800, extension 3700 to coordinate delivery of systems, once the installation date for the lockdown devices has been determined.

Please note: All school sites must maintain strict key control for the lockdown equipment. Two (2) sets of keys will be provided to each school site. The keys should not be loaned out or duplicated. It is the responsibility of the school site/department to unlock-lock assets for relocation. When assets are moved within the school/department or to off-site locations, the school site/department must update the equipment inventory and maintain a log of assets taken for repair.
## Computers – System Categories

### Computer system categories

<table>
<thead>
<tr>
<th>Suggested User Type</th>
<th>Computer Class</th>
<th>HP Model</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>Mid-range Desktop</td>
<td>dx7500 (KR786UT#ABA) - 2.6GHz Intel® Core™2 Duo E7400 processor, 19-inch display, 2GB RAM, 160GB hard disk</td>
<td>$798.00</td>
</tr>
<tr>
<td>Administrator</td>
<td>Performance Desktop</td>
<td>dx7500 (FS995AV) 2.6GHz Intel® Core 2 Duo (E7500), 19-inch display, 4GB RAM, 160GB hard disk, ATI 3470 video</td>
<td>$914.00</td>
</tr>
<tr>
<td>Administrator (mobile)</td>
<td>Economy Notebook</td>
<td>4810s (FM848UT#ABA) - 2.1GHz Intel® Core™2 Duo Processor (T6570), 15.6-inch display, 2GB RAM, 250GB hard disk</td>
<td>$991.00</td>
</tr>
<tr>
<td>Administrator (ultra mobile)</td>
<td>Ultra-light Notebook</td>
<td>2530p (FM857UT#ABA) - 1.8GHz Low-Voltage Intel® Core™2 Duo Processor (SL9400), 12.1-inch display, 2GB RAM, 250GB hard disk</td>
<td>$1,491.00</td>
</tr>
<tr>
<td>Administrative/Clerical</td>
<td>Mid-range Desktop</td>
<td>dx7500 (KR786UT#ABA) - 2.6GHz Intel® Core™2 Duo E7400 processor, 19-inch display, 2GB RAM, 160GB hard disk</td>
<td>$798.00</td>
</tr>
<tr>
<td>Teacher</td>
<td>Mid-range Desktop</td>
<td>dx7500 (KR786UT#ABA) - 2.6GHz Intel® Core™2 Duo E7400 processor, 19-inch display, 2GB RAM, 160GB hard disk</td>
<td>$851.00</td>
</tr>
<tr>
<td>Teacher (mobile)</td>
<td>Economy Notebook</td>
<td>4510a (FM848UT#ABA) - 2.1GHz Intel® Core™2 Duo Processor (T6570), 15.6-inch display, 2GB RAM, 250GB hard disk</td>
<td>$986.00</td>
</tr>
<tr>
<td>Student</td>
<td>Economy Desktop</td>
<td>dx2400 (NV952UT#ABA) - 2.2GHz Intel® Celeron® Dual Core processor (E1500), 19-inch display, 2GB RAM, 80GB hard disk</td>
<td>$717.00</td>
</tr>
<tr>
<td>Student</td>
<td>Mid-range Desktop</td>
<td>dx7500 (KR786UT#ABA) - 2.6GHz Intel® Core™2 Duo E7400 processor, 19-inch display, 2GB RAM, 160GB hard disk</td>
<td>$651.00</td>
</tr>
<tr>
<td>Student (mobile)</td>
<td>Economy Notebook</td>
<td>4810s (FM848UT#ABA) - 2.1GHz Intel® Core™2 Duo Processor (T6570), 15.6-inch display, 2GB RAM, 250GB hard disk</td>
<td>$996.00</td>
</tr>
</tbody>
</table>

### Systems include:
- 2GB of RAM (or better)
- 80GB hard disk (or better)
- Wireless network (notebooks only)
- 16x DVD±RW (except 2530p notebook)
- Windows XP
- 3-year warranty
- 3-year CompuTrac service (notebooks only)
- Adobe Digital School Collection (student & teacher systems only)
Purchase Order – Delays

Occasionally, there will be delays in the processing of Purchase Orders for purchases. There are usually well-defined reasons for this:

♦ Deficient specifications

♦ Difficulty locating a vendor for the required material

♦ Delays by Vendor

In the event that any delays in processing occur, the following procedures shall be followed:

♦ If specifications are deficient, site/department will be contacted by the Buyer. Many times a short conversation will remove the deficiency. If needed, the Purchase Requisition will be returned to the site or department for resolution.

♦ Buyer will advise site or department when material might be available.

♦ Buyer will advise site or department of the reason for delay immediately.

♦ In all cases where delays in processing Purchase Orders occur that significantly exceed the established processing standards; they are to be discussed with the Director of Purchasing.

♦ If difficulty in locating a suitable vendor occurs, the Buyer will discuss with the site or department.
Bids – Award Process

The Director of Purchasing has the responsibility for a uniform set of policies and forms to serve the bid process. Consideration should include the need for mechanisms for Vendor notification, bid analysis and summary, bid bonds, bidder mailing-list applications, competitive bid invitations, instructions to bidders, policy statement of bid award and power-of-attorney forms.

The method of procurement will depend on the nature of the service to be performed and any special requirements related to funding.

Formal bids are required in all cases where supply, equipment, and services exceed the state mandate under Public Contract Code $84,100 (This number changes each January 01, based on CPI) for equipment and materials or public work projects that meets or exceeds $15,000. A competitive bid may include one or all of the following:

- The purchase of equipment, material, or supplies to be furnished, sold or leased to the District
- Service except construction services.
- Repair, including maintenance as defined in Public Contract Code (PCC) 20115.

The Director of Purchasing is responsible for obtaining bids on all material and/or services covered under Public Contract Code Section 20111.

In some cases the district may use cooperative purchasing, defined as a “piggyback”. A piggyback bid may be one from any school district in the state of California or the State of California General Services Department such as CMAS (California Multi Agreement Schedule) or other state, county or local contracts.

If warranted by the district or state agency a renewal option may be considered up to five years under the State of California Education Code Section 81644 and Public Contract Codes 20118 and 20652.

The following factors in combination, not necessarily listed in their order of importance, will be considered in reviewing bids, “piggyback” bids and awarding contracts:

♦ Prices
♦ Bidder’s previous record of performance and service
♦ Ability of bidder to render satisfactory service in this instance
♦ Availability of bidder’s representative to call upon and consult with our using departments
♦ Quality and conformance to specifications

The District reserves the right to reject any and all bids, to waive informalities, and to contract as the best interests of the District may require. This should be clearly noted on all bid documents.

Bids shall not be solicited from, nor any order placed with any company that:

♦ Is owned, controlled, or actively influenced by any District employee or immediate relative of said employee;
♦ Employs in a management, consulting, or sales capacity any person who is a District employee;
♦ Employs in any capacity a District employee who is in a position to influence the selection of, or conduct business with, such vendor.
Contracts and Agreements

The District will issue Contracts or Agreements along with a Purchase Order for the purchase of major construction or services.
Conference & Hotel Accommodation Arrangements

The District’s Purchasing Department handles all Purchase Requisition requests for conferences, and lodging.

REGISTRATION – PURCHASE REQUISITION

The following procedures must be followed for conferences:

♦ Each form must adhere to the following conditions prior to completing the travel or conference process.

♦ Must be signed by the appropriate Administrator

♦ Before any conference arrangements can be processed an Online Purchase Requisition must be submitted to the Accounting Department for the appropriate signatures.

♦ Board approval date for conferences must appear on the Online Purchase Requisition and a copy of the Board Agenda item must also be attached.

♦ Check all appropriate boxes for requested expenses.

♦ State any limitations for funds.

♦ Registration forms must be submitted with the Online Purchase Requisition completely filled out, indicating the amount, date, and time of conference.

♦ Name of individual(s) who will attend conference.

HOTEL ACCOMMODATIONS – ONLINE PURCHASE REQUISITION

The following instructions will assist you in preparing an Online Purchase Requisition for lodging accommodations.

♦ Make sure the name of the hotel and phone number is indicated on the Online Purchase Requisition.

♦ In the body of the Online Purchase Requisition type the person’s name who will be staying overnight and the conference or function they are attending.

♦ State the number of nights and days the individual will be staying, with the arrival and departure dates.

♦ Copy of confirmation, quote or invoice must be attached.

♦ Give the room rate and room tax rate, which may be obtained from the conference brochure or from the hotel in which you are staying.

♦ List any special rates such as conference rates.

♦ Please note the District does not arrange or pay for hotel accommodations for those other than District employees and Board Members unless duly stated by the funding documents.
Conference and Hotel Accommodation Arrangements

FIELD TRIPS – ONLINE PURCHASE REQUISITION

♦ School Name, number of adults and students, pricing, date

♦ Back-up has to be from Vendor

♦ Method of payment

♦ Cabinet approval – responsibility of site/department

Note: Any incomplete information or missing paperwork will delay process of your request.
Warehouse Inventory – Purchase of Stock

PROCEDURES

♦ **Order Online** – Purchase Requisition(s) for warehouse stock for *custodial and printed forms is entered via online using the Smarte Finance System. Any questions regarding the Smarte Finance System, contact the Purchasing Department. Once existing printed forms stock is depleted, they will be available to order online via Officer Depot.

♦ **Authorization** – All required authorizations must be obtained and entered into the system before the Purchase Requisition can be processed.

♦ **Back Orders** – Out-of-stock items are automatically backordered by the system and are filled when the out-of-stock item is replenished. All back orders will not show on the packing slip.

♦ **Delivery Time** – The normal lead-time is five (5) working days from the time the order is received in the warehouse that the order is available for order filling. Peak load order volumes at certain times of the year can cause this lead-time to be longer than five working days. Delivery memos require full signature and the printed last name. This is done so that there will be an accurate record of the delivery to the site.

♦ **Concerns** – Any visible exceptions such as shortages, visible damage or overage stock should be noted on the delivery memo prior to signing the receipt of the goods. Concealed shortages or damages (not visible at time of delivery) must be reported within five (5) working days from time of delivery. The Warehouse will investigate any such exception and advise disposition once the investigation has been concluded.

Please contact the Purchasing Department at (909) 397-4800, Ext. 3900 for any questions regarding Smarte Finance.
Warehouse Inventory – Process

INVENTORY REQUISITION ROUTING FLOW CHART

Inventory Req Routing
All routes 4/16/2008

New Warehouse Req[1]


Restricted; see note below.

Food Services no encumber
(Food Services)

Accounting Inbox [2]


Warehouse [3]

Return to Initiator

Routes are permitted from “New Warehouse Req” to “Accounting Inbox” or “Accounting Inbox Override” unless the account number matches one of the following account groups:

- M&O Supplies
- General Fund Restricted (State & Federal Programs)

Normal route
Update encumbrance
Update/surplus balance warn
Remove encumbrance
Restricted (plus color)
Access group (plus color)
Warehouse Receiving – Process

The Warehouse receives all inbound shipments of equipment, supplies or materials that have been procured by the Purchasing Department for the District. The Warehouse will inspect all inbound shipments to the District Warehouse before release of any equipment, supplies or materials.

District Warehouse personnel will deliver equipment, supplies or materials to the initiator site or department of the District. The initiator shall acknowledge receipt of equipment, supplies or materials by signing one of the Warehouse Delivery Memo Forms (see Sample Forms in Exhibit Section). The signed District Receiver shall be promptly forwarded to the Accounting Department for processing. Failure to process the Receiver in a timely manner may result in delay of payment to vendors. Any concerns regarding your order, contact the Warehouse Supervisor.

The District does not accept or receive personal items delivered UPS, US Mail, or Federal Express or any other type of delivery service. If such items are delivered, they will be refused or sent back with courier.

SOFTWARE LICENSE RECEIVING PROCESS

Software License(s) are delivered to the Senior Technical Assistant of Purchasing for quality control checks in one of two ways:

1) Via hard copy of license certificate (the original is kept on file in the Purchasing Department and the copy is returned to the Warehouse for deliver to the site or department’

2) Via electronic notification

The site or department is responsible for contacting the IT Department to schedule installation of license(s) once the Purchase Order has been received.

RECEIVING AND DELIVERY OF TECHNOLOGY EQUIPMENT

The Warehouse shall deliver computers or other related technology equipment to a site/department at the administrator’s request. It is the site/department administrator’s responsibility to identify and assure a secure location for housing such technology.
FIXED ASSETS

In Pursuant of Education Code 35168, the governing board of each school district, shall establish and maintain a historical inventory, or an audit trace inventory system, or any other inventory system authorized by the State Board of Education, which shall contain the description, name, identification numbers, and original cost of all items of equipment acquired by it whose current market value exceeds five hundred dollars ($500) per item, the date of acquisition, the location of use, and the time and mode of disposal. A reasonable estimate of the original cost may be used if the actual original cost is unknown.

- Items are received in the Warehouse; The Warehouse’s Receiving unit should confirm Purchase Order by reviewing the packing slip.
- Receiving will compare District receiving document with packing list to ensure receipt of product(s). Receiving will inspect item(s) to confirm the condition of the item(s).
- Receiving will identify all Fixed Assets items in the Smarte Finance System. The Warehouse will review dollar amounts that are equal to or exceed the $500 threshold under Education Code 35168. (Also those items that the Purchasing Department considers of a significant value, example; digital camera valued at $375.00)
- Upon identifying the items value, by reviewing the marked Fixed Assets Box in the Smarte Finance System, Receiving will engrave the letters “P.U.S.D.” (Pomona Unified School District) and zip code “91766”, in an area that will limit tampering. On each unit, Receiving will place the District’s inventory control tag with Bar Code capabilities.
- Each unit(s) with Bar Code will be entered in the current District Inventory Control System. Fixed Asset System information to be entered into this system information include, received date, P.O. #, vendor, unit cost and quantity, serial number, District to define assets classification, (land, building equipment, non capital equipment), disposal data, including date, method, other information, service and warranty information, location of assets, including site, department and room number.
Return of Equipment/Supplies to Vendors

It is the site or departments responsibility that items received are correct and in good working order. Any visible exceptions such as shortages, visible damage or overage stock should be noted on the delivery memo prior to signing the receipt of the goods. Concealed shortages or damages (not visible at time of delivery) must be reported within five (5) working days from time of delivery.

The Purchasing Department must be promptly informed when a site or department has received damaged, defective, or non-ordered equipment or supplies. The Purchasing Department will arrange for return of the equipment or supplies to the vendor and will inform the Requester as to the pick-up and shipping arrangements that have been made. (A copy of the paperwork for the item(s) returned, will be kept on file in the Warehouse.)

Item(s) must be returned to the vendor within 30 days. Failure to notify the Buyer of an item that should be returned could result in the vendor charging a restocking fee. The site or department will be responsible for paying this fee.
Other Services

**HELP DESK SERVICES**

In order to better serve our customer (Sites and Departments) the Purchasing Department has implemented a tool to assist and expedite your request for Warehouse Service Requests.

This new electronic help desk service will assist in Cartage, Transfer of Equipment, Surplus of Obsolete Equipment, Materials and Supplies, Band Runs, Plate forms, Risers, Book Transfers, Student Records or Records Transfer and other service requests. Please use the Warehouse’s new Help Desk Request System for any request for these services. To access the web link, go to [www.pusd.org/purchasing](http://www.pusd.org/purchasing) and click on the menu.

To request a cartage service, you will need to submit a request via the Help Desk Request System. **Please do not e-mail, fax or phone-in cartage requests.** Please provide enough detail to allow cartage to estimate time requirements. Also, include phone numbers and name(s) of a contact at the site.

The District must periodically dispose of equipment and material(s), which are considered to be obsolete or surplus to the District’s needs. The Purchasing Department is responsible for the collecting and selling of all obsolete and surplus items in accordance with statutes of the State of California. No other staff member is authorized to dispose of District equipment and material(s).

Please use the Warehouse’s new Help Desk Request System for any Request for Surplus and Obsolete Equipment/Material. To access the web link, go to [www.pusd.org/purchasing](http://www.pusd.org/purchasing) and click on the Warehouse link in the menu.

If you have a deadline or specific date request, please indicate that information on the request. All services are scheduled on first-come first-serve basis. If possible, services will endeavor to conform to the sites deadlines and schedules. However, meeting requested dates and deadlines might not always be possible due to prior requests, so it is advisable to submit your service requests as far in advance as possible.

The Warehouse no longer maintains a supply of chairs. It is advisable that all sites or departments plan ahead to arrange the rental, lease or purchase chairs for any activities that will require the use of a large number of chairs.

The Warehouse Department does not have the capability to respond to cartage moves upon request. Note that the Warehouse does not perform maintenance tasks or to **disassemble equipment or pack** for teacher moves. Any disassembly or packing should be done prior to the arrival of the service crew. Warehouse service workers are limited to situations that can be reasonably accomplished by two individuals and a truck, anything outside this scope may require an outside contractor for which you will need to contact the Purchasing Department for determination.

It is the responsibility of the requesting site/department to make sure all storage lateral filing cabinets are empty prior to moving.

Due to liability concerns, the cartage crew will not move personal equipment or supplies for any District employee. Please utilize your custodial employees for on-site small moves. i.e., classroom to classroom moves.
Other Services

Please Note: Only work specified on the request will be performed. Any additional work will need to be resubmitted.

All moves regarding “system type” furniture – contact the Purchasing Department.
**Donation of Equipment or Supplies**

The District’s Board of Education welcomes donations that meet Board Policy. We in the Warehouse understand the importance of such donations, but at the same time must prioritize all incoming requests. Requests for pickup or delivery of donations will be handled as time and labor permits.

All donation requests must be directed to Business Services Department for approval.

All donation requests must be board approved prior to pick up. Pick-ups must be approved by the Director of Purchasing.

All requests must be submitted by warehouse ticket with board approval date or copy of board approval page.
Print Management Services

The Purchasing Department’s Print Services provides a state of the art printing and performance standard that addresses the District’s current printing needs.

This service provides a solution with multiple options. The service enhancements include creation of an electronic document file cabinet for forms management, aggressive implementation of desk top document scanning to digitize documents and a flexible document pickup and delivery solution.

- Order Submission – Print-On-Demand application or e-mail which allows direct communication with the vendor, creation of an electronic job ticket to track site or department order requests and an account user limit to electronically account for each order to assure account does not go over budget.

- Distribution Flow – Print orders submitted through electronic submission or hard copy will be delivered by vendor truck to the District Warehouse. The District Warehouse will deliver all submitted print jobs to each District site or department.
## Copy Costs

### Copy Service Rates

<table>
<thead>
<tr>
<th>BW Full Serve - Number Of Impressions</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>BW SS Letter</td>
<td>$0.022</td>
</tr>
<tr>
<td>BW SS Legal</td>
<td>$0.022</td>
</tr>
<tr>
<td>BW SS Ledger</td>
<td>$0.044</td>
</tr>
<tr>
<td>BW DS Letter</td>
<td>$0.022</td>
</tr>
<tr>
<td>BW DS Legal</td>
<td>$0.022</td>
</tr>
<tr>
<td>BW DS Ledger</td>
<td>$0.044</td>
</tr>
</tbody>
</table>

**Notes:** All pricing is for collated and uncollated. Copies are priced per impression.

### Color Full Serve - Number of Impressions

<table>
<thead>
<tr>
<th>Color SS Letter</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Color SS Legal</td>
<td>$0.370</td>
</tr>
<tr>
<td>Color SS Ledger</td>
<td>$0.740</td>
</tr>
<tr>
<td>Color DS Letter</td>
<td>$0.370</td>
</tr>
<tr>
<td>Color DS Legal</td>
<td>$0.370</td>
</tr>
<tr>
<td>Color DS Ledger</td>
<td>$0.740</td>
</tr>
</tbody>
</table>

**Notes:** All pricing is for collated and uncollated. Copies are priced per impression.

### Paper Upgrades

#### 20 LB PASTEL - Letter

<table>
<thead>
<tr>
<th>Paper Type</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue</td>
<td>$0.010</td>
</tr>
<tr>
<td>Buff</td>
<td>$0.010</td>
</tr>
<tr>
<td>Goldenrod</td>
<td>$0.010</td>
</tr>
<tr>
<td>Gray</td>
<td>$0.010</td>
</tr>
<tr>
<td>Green</td>
<td>$0.010</td>
</tr>
<tr>
<td>Ivory</td>
<td>$0.010</td>
</tr>
<tr>
<td>Lilac</td>
<td>$0.010</td>
</tr>
<tr>
<td>Pink</td>
<td>$0.010</td>
</tr>
<tr>
<td>Salmon</td>
<td>$0.010</td>
</tr>
<tr>
<td>Yellow</td>
<td>$0.010</td>
</tr>
</tbody>
</table>

#### 20 LB PASTEL - Legal

<table>
<thead>
<tr>
<th>Paper Type</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue</td>
<td>$0.010</td>
</tr>
<tr>
<td>Buff</td>
<td>$0.010</td>
</tr>
<tr>
<td>Gray</td>
<td>$0.010</td>
</tr>
<tr>
<td>Green</td>
<td>$0.010</td>
</tr>
<tr>
<td>Ivory</td>
<td>$0.010</td>
</tr>
<tr>
<td>Lilac</td>
<td>$0.010</td>
</tr>
<tr>
<td>Pink</td>
<td>$0.010</td>
</tr>
<tr>
<td>Salmon</td>
<td>$0.010</td>
</tr>
<tr>
<td>Yellow</td>
<td>$0.010</td>
</tr>
</tbody>
</table>

#### 20 LB PASTEL - Ledger

<table>
<thead>
<tr>
<th>Paper Type</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pink</td>
<td>$0.010</td>
</tr>
<tr>
<td>Lt. Blue</td>
<td>$0.010</td>
</tr>
<tr>
<td>Ivory</td>
<td>$0.010</td>
</tr>
<tr>
<td>Yellow</td>
<td>$0.010</td>
</tr>
<tr>
<td>Goldenrod</td>
<td>$0.010</td>
</tr>
<tr>
<td>Green</td>
<td>$0.010</td>
</tr>
</tbody>
</table>

#### 3 Hole Paper -Letter

<table>
<thead>
<tr>
<th>Paper Type</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>$</td>
</tr>
</tbody>
</table>
### Paper Upgrades

<table>
<thead>
<tr>
<th>SPECIALTY PAPER - Letter</th>
<th>SKU</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greeting Cards</td>
<td>168593</td>
<td>$1.118</td>
</tr>
<tr>
<td>Envelopes</td>
<td>168614</td>
<td>$0.272</td>
</tr>
<tr>
<td>Trifold Brochure</td>
<td>168628</td>
<td>$0.323</td>
</tr>
<tr>
<td>Presentation Folders</td>
<td>167172</td>
<td>$2.433</td>
</tr>
<tr>
<td>Crisp Cut Business Cards 10up</td>
<td>167179</td>
<td>$0.713</td>
</tr>
<tr>
<td>Bus Cards Set Up Fee</td>
<td>166689</td>
<td>$3.750</td>
</tr>
<tr>
<td>Bus Cards 10 up</td>
<td>167186</td>
<td>$0.750</td>
</tr>
<tr>
<td>Premium Paper</td>
<td>168348</td>
<td>$0.021</td>
</tr>
</tbody>
</table>

### 24 LB BRIGHTS - Letter

<table>
<thead>
<tr>
<th>SKU</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cosmic Orange</td>
<td>$0.010</td>
</tr>
<tr>
<td>Fireball Fuschia</td>
<td>$0.010</td>
</tr>
<tr>
<td>Gamma Green</td>
<td>$0.010</td>
</tr>
<tr>
<td>Lift-off Lemon</td>
<td>$0.010</td>
</tr>
<tr>
<td>Lunar Blue</td>
<td>$0.010</td>
</tr>
<tr>
<td>Pluto Purple</td>
<td>$0.010</td>
</tr>
<tr>
<td>Pulsar Pink</td>
<td>$0.010</td>
</tr>
<tr>
<td>Re-entry Red</td>
<td>$0.010</td>
</tr>
<tr>
<td>Rocket Red</td>
<td>$0.010</td>
</tr>
<tr>
<td>Solar Yellow</td>
<td>$0.010</td>
</tr>
<tr>
<td>Terra Green</td>
<td>$0.010</td>
</tr>
<tr>
<td>Venus Violet</td>
<td>$0.010</td>
</tr>
<tr>
<td>Bright Paper Upgrade</td>
<td>$0.010</td>
</tr>
</tbody>
</table>

### 90 LB Bright - Letter

<table>
<thead>
<tr>
<th>SKU</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>$0.038</td>
</tr>
<tr>
<td>Blue</td>
<td>$0.038</td>
</tr>
<tr>
<td>Buff</td>
<td>$0.038</td>
</tr>
<tr>
<td>Cherry</td>
<td>$0.038</td>
</tr>
<tr>
<td>Green</td>
<td>$0.038</td>
</tr>
<tr>
<td>Salmon</td>
<td>$0.038</td>
</tr>
<tr>
<td>Yellow</td>
<td>$0.038</td>
</tr>
<tr>
<td>Ledger Any Color</td>
<td>$0.038</td>
</tr>
</tbody>
</table>

### NCR & TAB Sets

<table>
<thead>
<tr>
<th>SKU</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Part NCR - Letter - White/Canary</td>
<td>$0.100</td>
</tr>
<tr>
<td>2 Part NCR - Legal - White/Canary</td>
<td>$0.140</td>
</tr>
<tr>
<td>3 Part NCR - Letter - W/C/P</td>
<td>$0.190</td>
</tr>
<tr>
<td>3 Part NCR - Legal - W/C/P</td>
<td>$0.200</td>
</tr>
<tr>
<td>4 Part NCR - Letter - W/C/P/G</td>
<td>$0.270</td>
</tr>
<tr>
<td>4 Part NCR - Legal - W/C/P/G</td>
<td>$0.290</td>
</tr>
<tr>
<td>Tab Sets Bank of 5 - White</td>
<td>$0.563</td>
</tr>
<tr>
<td>Tab Sets Bank of 5 - Ivory</td>
<td>$0.563</td>
</tr>
<tr>
<td>Tab Sets Bank of 5 - Blue</td>
<td>$0.563</td>
</tr>
<tr>
<td>Tab Sets Bank of 5 - Gray</td>
<td>$0.563</td>
</tr>
<tr>
<td>Tab Sets Bank of 5 - White</td>
<td>$0.563</td>
</tr>
<tr>
<td>Tab Sets Bank of 5 - Ivory - 3 hole</td>
<td>$0.563</td>
</tr>
<tr>
<td>Tab Sets Bank of 5 - Blue - 3 hole</td>
<td>$0.563</td>
</tr>
<tr>
<td>Tab Sets Bank of 5 - Gray - 3 hole</td>
<td>$0.563</td>
</tr>
<tr>
<td>Tab Sets Bank of 5 - White</td>
<td>$0.563</td>
</tr>
<tr>
<td>Tab Sets Bank of 5 - Ivory - 3 hole</td>
<td>$0.563</td>
</tr>
<tr>
<td>Tab Sets Bank of 5 - Blue - 3 hole</td>
<td>$0.563</td>
</tr>
<tr>
<td>Tab Sets Bank of 5 - Gray - 3 hole</td>
<td>$0.563</td>
</tr>
</tbody>
</table>
### Finishing Services

<table>
<thead>
<tr>
<th>Service</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lamination</td>
<td></td>
</tr>
<tr>
<td>Letter - 5 Mil</td>
<td>$1.118</td>
</tr>
<tr>
<td>Legal - 5 Mil</td>
<td>$1.493</td>
</tr>
<tr>
<td>Ledger - 5 Mil</td>
<td>$2.243</td>
</tr>
<tr>
<td>Letter - 10 Mil</td>
<td>$1.888</td>
</tr>
<tr>
<td>Legal - 10 Mil</td>
<td>$2.243</td>
</tr>
<tr>
<td>Ledger - 10 Mil</td>
<td>$3.743</td>
</tr>
<tr>
<td>Business Cards</td>
<td>$0.938</td>
</tr>
<tr>
<td>Luggage Tags 10 MIL</td>
<td>$0.938</td>
</tr>
<tr>
<td>Alligator Badge Clips</td>
<td>$0.368</td>
</tr>
<tr>
<td>ID Badges</td>
<td>$1.118</td>
</tr>
<tr>
<td>Shrink Wrap</td>
<td></td>
</tr>
<tr>
<td>Shrink Wrapping</td>
<td>$0.560</td>
</tr>
<tr>
<td>Stapling</td>
<td></td>
</tr>
<tr>
<td>Hand Stapling</td>
<td>$0.045</td>
</tr>
<tr>
<td>Stapling Booklet</td>
<td>$0.260</td>
</tr>
<tr>
<td>Stapling Upper Left</td>
<td>$0.009</td>
</tr>
<tr>
<td>Stapling Upper Right</td>
<td>$0.009</td>
</tr>
<tr>
<td>Stapling Double Staple - Left</td>
<td>$0.018</td>
</tr>
<tr>
<td>Folding</td>
<td></td>
</tr>
<tr>
<td>Letter - Z fold</td>
<td>$0.040</td>
</tr>
<tr>
<td>Letter - Trifold</td>
<td>$0.040</td>
</tr>
<tr>
<td>Letter - Half</td>
<td>$0.019</td>
</tr>
<tr>
<td>Legal - Z fold</td>
<td>$0.060</td>
</tr>
<tr>
<td>Legal - Trifold(Letter)</td>
<td>$0.060</td>
</tr>
<tr>
<td>Legal - Half</td>
<td>$0.019</td>
</tr>
<tr>
<td>Legal - Parallel</td>
<td>$0.060</td>
</tr>
<tr>
<td>Folding</td>
<td>$0.040</td>
</tr>
<tr>
<td>Padding</td>
<td></td>
</tr>
<tr>
<td>Padding</td>
<td>$0.300</td>
</tr>
<tr>
<td>Cutting</td>
<td></td>
</tr>
<tr>
<td>Cutting</td>
<td>$0.563</td>
</tr>
<tr>
<td>Cut in 1/2 Horizontal = 2 pieces</td>
<td>$0.563</td>
</tr>
<tr>
<td>Cut in 1/2 Vertical = 2 pieces</td>
<td>$0.563</td>
</tr>
<tr>
<td>Cut in 1/3 Horizontal = 3 pieces</td>
<td>$1.125</td>
</tr>
<tr>
<td>Cut in 1/4 = 4 pieces</td>
<td>$1.688</td>
</tr>
<tr>
<td>Clearview Binders</td>
<td></td>
</tr>
<tr>
<td>1/2&quot; Binder White</td>
<td>$1.643</td>
</tr>
<tr>
<td>1/2&quot; Binder Black</td>
<td>$1.643</td>
</tr>
<tr>
<td>1&quot; Binder White</td>
<td>$1.643</td>
</tr>
<tr>
<td>1&quot; Binder Black</td>
<td>$1.643</td>
</tr>
<tr>
<td>1 1/2&quot; Binder White</td>
<td>$2.693</td>
</tr>
<tr>
<td>1 1/2&quot; Binder Black</td>
<td>$2.693</td>
</tr>
<tr>
<td>2&quot; Binder White</td>
<td>$3.293</td>
</tr>
<tr>
<td>2&quot; Binder Black</td>
<td>$3.293</td>
</tr>
<tr>
<td>3&quot; Binder White</td>
<td>$4.343</td>
</tr>
<tr>
<td>3&quot; Binder Black</td>
<td>$4.343</td>
</tr>
</tbody>
</table>
## Finishing Services

<table>
<thead>
<tr>
<th>DRILLING</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 hole</td>
<td>$2.063</td>
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<tr>
<td>2 hole</td>
<td>$2.813</td>
</tr>
<tr>
<td>3 hole</td>
<td>$3.563</td>
</tr>
<tr>
<td>Custom</td>
<td>$3.750</td>
</tr>
</tbody>
</table>

## Wide Format

<table>
<thead>
<tr>
<th>WIDE FORMAT COLOR</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>WF Color Glossy Per Sq Ft</td>
<td>$7.490</td>
</tr>
<tr>
<td>WF Color Std Per Sq Ft</td>
<td>$5.990</td>
</tr>
<tr>
<td>Vinyl Banner Per Sq Ft**</td>
<td>$6.370</td>
</tr>
<tr>
<td>Artist Matte Canvas</td>
<td>$7.490</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WIDE FORMAT LAMINATING</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wide Format Vellum</td>
<td>$1.500</td>
</tr>
<tr>
<td>Wide Format Mylar</td>
<td>$2.813</td>
</tr>
<tr>
<td>Wide Format Never Tear</td>
<td>$3.188</td>
</tr>
<tr>
<td>Wide Format Laminating Per Sq Ft</td>
<td>$0.750</td>
</tr>
<tr>
<td>WF Laminate 3 mil Per Sq Ft</td>
<td>$1.343</td>
</tr>
<tr>
<td>WF Laminate 5 mil Per Sq Ft</td>
<td>$1.493</td>
</tr>
<tr>
<td>WF Laminate 10 mil Per Sq Ft</td>
<td>$1.568</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ENGINEERING</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engineering Paper, Bond - Per Sq Ft</td>
<td>$0.338</td>
</tr>
<tr>
<td>Engineering Paper Vellum - Per Sq Ft</td>
<td>$1.118</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WF FINISHING SERVICES</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scale Change***</td>
<td>$3.750</td>
</tr>
<tr>
<td>Mounting Per Sq Ft</td>
<td>$2.630</td>
</tr>
<tr>
<td>WF Package Price Per Sq Ft*</td>
<td>$3.970</td>
</tr>
<tr>
<td>Single Grommet</td>
<td>$0.190</td>
</tr>
</tbody>
</table>

## Special Services

<table>
<thead>
<tr>
<th></th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>CD Burn/Scan OD or Customer Supplied</td>
<td>$2.243</td>
</tr>
<tr>
<td>File Manipulation ea min editing</td>
<td>$0.750</td>
</tr>
<tr>
<td>File Manipulation Quick Editing</td>
<td>$0.188</td>
</tr>
<tr>
<td>Creative Customization - Hand Collation</td>
<td>$0.038</td>
</tr>
<tr>
<td>Creative Customization - Hand Place Original</td>
<td>$0.188</td>
</tr>
</tbody>
</table>

## Domestic Fax

<table>
<thead>
<tr>
<th></th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sending - Local and Toll Free</td>
<td>$1.313</td>
</tr>
<tr>
<td>Sending - Each Add'l Page</td>
<td>$0.750</td>
</tr>
<tr>
<td>Sending - Long Distance</td>
<td>$1.688</td>
</tr>
<tr>
<td>Sending - Each Add'l LD Page</td>
<td>$0.750</td>
</tr>
<tr>
<td>Receiving</td>
<td>$0.938</td>
</tr>
</tbody>
</table>

## International Fax

<table>
<thead>
<tr>
<th></th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sending - First Page</td>
<td>$5.993</td>
</tr>
<tr>
<td>Sending - Each Add'l Page</td>
<td>$2.993</td>
</tr>
<tr>
<td>Receiving</td>
<td>$0.938</td>
</tr>
</tbody>
</table>

## Typesetting

<table>
<thead>
<tr>
<th></th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simple</td>
<td>$11.250</td>
</tr>
<tr>
<td>Half Page Text</td>
<td>$22.500</td>
</tr>
<tr>
<td>Full 8.5 x 11 Text</td>
<td>$45.000</td>
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</tbody>
</table>
## Print Management Services – Copy Costs

### Binding

<table>
<thead>
<tr>
<th>Binding Covers</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plain Frosted Covers</td>
<td>$ 0.469</td>
</tr>
<tr>
<td>Deco Cube Frosted Covers</td>
<td>$ 0.563</td>
</tr>
<tr>
<td>Globe Design Frosted Covers</td>
<td>$ 0.563</td>
</tr>
<tr>
<td>Clear Front</td>
<td>$ 0.375</td>
</tr>
<tr>
<td>Clear Back</td>
<td>$ 0.375</td>
</tr>
<tr>
<td>Solid Back Black</td>
<td>$ 0.375</td>
</tr>
<tr>
<td>Solid Back Green</td>
<td>$ 0.375</td>
</tr>
<tr>
<td>Solid Back Gray</td>
<td>$ 0.375</td>
</tr>
<tr>
<td>Solid Back Maroon</td>
<td>$ 0.375</td>
</tr>
<tr>
<td>Solid Back Navy</td>
<td>$ 0.375</td>
</tr>
<tr>
<td>Solid Back White</td>
<td>$ 0.375</td>
</tr>
<tr>
<td>Linen Cover Black</td>
<td>$ 0.281</td>
</tr>
<tr>
<td>Linen Cover Grey</td>
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</tr>
<tr>
<td>Linen Cover White</td>
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</tr>
<tr>
<td>Regency Cover Black</td>
<td>$ 0.469</td>
</tr>
<tr>
<td>Regency Cover Maroon</td>
<td>$ 0.469</td>
</tr>
<tr>
<td>Regency Cover Navy</td>
<td>$ 0.469</td>
</tr>
<tr>
<td>Regency Cover White</td>
<td>$ 0.469</td>
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</table>

### Binding |

<table>
<thead>
<tr>
<th>Binding</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tape Binding Black 1-100 pages</td>
<td>$ 1.418</td>
</tr>
<tr>
<td>Tape Binding Gray 1-100 pages</td>
<td>$ 1.418</td>
</tr>
<tr>
<td>Tape Binding Brown 1-100 pages</td>
<td>$ 1.418</td>
</tr>
<tr>
<td>Tape Binding Black 101+ pages</td>
<td>$ 1.493</td>
</tr>
<tr>
<td>Tape Binding Gray 101+ pages</td>
<td>$ 1.493</td>
</tr>
<tr>
<td>Tape Binding Brown 101+ pages</td>
<td>$ 1.493</td>
</tr>
<tr>
<td>Comb Binding 1-100 pages Black</td>
<td>$ 1.418</td>
</tr>
<tr>
<td>Comb Binding 1-100 pages White</td>
<td>$ 1.418</td>
</tr>
<tr>
<td>Comb Binding 1-100 pages Blue</td>
<td>$ 1.418</td>
</tr>
<tr>
<td>Comb Binding 1-100 pages Other</td>
<td>$ 1.490</td>
</tr>
<tr>
<td>Comb Binding 101 + Black</td>
<td>$ 1.493</td>
</tr>
<tr>
<td>Comb Binding 101 + Blue</td>
<td>$ 1.493</td>
</tr>
<tr>
<td>Comb Binding 101 + White</td>
<td>$ 1.493</td>
</tr>
<tr>
<td>Comb Binding 101 + Other</td>
<td>$ 1.493</td>
</tr>
<tr>
<td>Coil Binding 1-100 Black</td>
<td>$ 1.990</td>
</tr>
<tr>
<td>Coil Binding 1-100 White</td>
<td>$ 1.990</td>
</tr>
<tr>
<td>Coil Binding 1-100 Blue</td>
<td>$ 1.990</td>
</tr>
<tr>
<td>Coil Binding 1-100 Clear</td>
<td>$ 1.990</td>
</tr>
<tr>
<td>Coil Binding 1-100 Other</td>
<td>$ 1.990</td>
</tr>
<tr>
<td>Coil Binding 101 + Black</td>
<td>$ 1.990</td>
</tr>
<tr>
<td>Coil Binding 101 + White</td>
<td>$ 1.990</td>
</tr>
<tr>
<td>Coil Binding 101+ Blue</td>
<td>$ 1.990</td>
</tr>
<tr>
<td>Coil Binding 101 + Clear</td>
<td>$ 1.990</td>
</tr>
<tr>
<td>Coil Binding 101 + Other</td>
<td>$ 1.990</td>
</tr>
</tbody>
</table>
Mail Room Procedures

PROCEDURES FOR MAIL TO BE POSTED

♦ #10 envelopes to be posted must be stacked and stuffed correctly in order to run them through the postage machine without causing jams or tears.

♦ Contents of envelope must be beneath flap fold line, unless the envelope is sealed.

♦ If unsealed, the envelopes must be right side up with the flaps going the same direction. At times, envelopes are brought with the labels right side up, but with the flaps upside down. If unsealed, the flaps must be going the same direction. Preferably, if unsealed, the flaps must be down.

♦ Envelopes that are a quarter of an inch thick or thicker must be sealed. The postage machine has a thickness limit.

♦ Make sure that the upper right corner of envelope is free of staples and/or paper clips. This is where the stamp is applied to the envelope and many times if something is hindering the stamp from making its imprint, the post office will not accept it and send it back. It then must be re-stamped with extra postage. This also causes a delay in the mailing.

♦ No flyers can be posted without envelopes. All correspondence must be inside envelopes. Unless done in post card format (See next Item).

♦ No dark graphics on the back of post cards. Sensors on machine will not send the cards through.

♦ Do not use dark construction paper to send out post cards. (i.e., Black, brown, dark red, dark or navy blue, etc.) If you can’t read a red ink stamp on the paper then the post office can’t read the postage on the card. Also, the dark color causes the sensors on the postage machine to stall.

♦ In addressing the envelopes or cards, be sure to include the whole address, INCLUDING THE ZIP CODE. If detected the mailing is sent back to the department or site for application of the complete address. If it is not detected it will be sent back at least two days later with ‘Insufficient Address’ as the reason, causing unnecessary delays.

♦ In order to ensure proper and timely handling of U.S. mail, the U.S. Postal Service has started to enforce how handwritten envelopes for letters, etc. are addressed for mailing. To avoid additional postage fees, all envelopes for U.S. mail must be typed. Please follow the procedure below when typing envelopes):

1. Center your addresses (including typed shipping/address labels) on the envelopes, leaving one (1) inch of blank space on the bottom of the envelope. (The Post Office adds the bar code at the bottom of all letters)
2. Do not place stickers, or graphics or decorations on the bottom of envelopes.
3. Do not place addresses near the upper right hand corner of envelopes, as this is where the postage must be applied.
   (This is the criteria set by the U.S. Postal Service.)

Note: All handwritten envelopes shall be returned to the site/department for correction.
Mail Room Procedures

Manila envelopes must be sealed. If they are sent to the mailroom unsealed, they will be sent back to you. No exception. Be sure contents of manila envelopes do not have bumps or paper clips or staples in upper right hand corner. If by chance they are thin enough to run through the machine, a smooth area is required for the stamp to be placed.

**METAL CLASP ENVELOPE CLOSURES:**
Metal clasps place all envelopes into category of "Non-machinable" mail. This means an extra .17 cents must be applied as a surcharge fee. If using envelopes with metal clasps, please simply seal the envelope with packing tape. A one to two inch length of tape is sufficient. You do not need to cover the entire flap area. Usually, packing tape on ALL manila envelopes makes for faster, smoother posting without delays.

**Non-Machinable mail is as follows:**

A) Mail that contains solid objects (such as pens, pencils, keys, buttons, etc.)
B) Envelopes that consist of string closures, or metal clasp closures. All manila envelopes that are sealed with metal clasps will be returned to the school sites. You can still use those envelopes for mailings, just do not use the clasps to seal them. Use packing tape. (Strips 2" in length is sufficient) (No scotch tape or masking tape.)
C) Addresses that cannot be read by the OCR reading machines to determine bar codes (i.e., addresses that are unreadable or placed outside of the designated OCR readable area. Please center your addresses in the envelope, (Window envelopes are fine, as long as the full address is able to be seen.) If addresses are placed too high or too low, this will cause delays in mailings and additional charges. If addresses are not centered and kept within Postal Service guidelines (please see attached form 602 – Quick Service Guide from the United States Postal Service (USPS) Website), the envelopes will be returned to your site for correction.) Envelopes with address labels askew on the envelope will be returned to school site for correction. **Please avoid unnecessary cost and delays with your mailings by adhering to the addressing guidelines.**

**POST CARDS:**
Minimum size – 3 ½ " X 5"
Maximum size – 4 ¼" X 6" (Anything below minimum will not be accepted by the post office. Anything above the maximum will be posted regular letter rate.)

**FLATS:**
Maximum weight 13 ounces
Pieces that exceed any dimension (listed below) are charged as parcels.

Dimensions for Flats:
- Length Minimum: 11-1/2 inches Maximum: 15 inches
- Height 6-1/8 inches Maximum: 12 inches
- Thickness Minimum ¼ inch Maximum ¾ inch

Flats with the following characteristics are also subject to parcel prices:
1) Not flexible (cannot be bent)
2) Not rectangular
3) Not uniform in thickness
Mail Room Procedures

FIRST CLASS LETTERS:
Please see attached Guidelines for maximum and minimum size for first class letters. (Forms 201 and 301)

Maximum weight: 3.5 ounces
Pieces that exceed 3.5 ounces or any letter-size dimensions are charged as 'Flats'.

Length   Minimum: 5 inches   Maximum: 11-1/2 inches
Height   Minimum: 3-1/2 inches   Maximum: 6-1/8 inches
Thickness Minimum: .007 inch   Maximum: ¼ inch

Business envelopes (size #10) regulations:
If the thickness of the envelope passes ¼" then the envelope must be upgraded to a flat and will go for a 'Flat' rate. This will mean extra postage.

Further information regarding new Postal Procedures and Prices will be given out once it is made available.

DEADLINES FOR POSTING MAIL:
Due to changes in Warehouse procedures and deliveries, new deadlines for mailings to be in the mailroom have been implemented. If deadlines are missed, your mail will be posted the next business day.

#10 (Business) envelopes for mailings of 300 letters or more, must be turned into the mailroom by 1:00 (if brought in outside the Warehouse pick-up/delivery system) in order to meet the 3:00 posting deadline. Envelopes must be grouped together in rubber bands or placed inside envelope boxes. Make sure flaps are going the same direction and that they are 'down' if unsealed. Contents must be below flap fold line. (Please SEPARATE sealed from unsealed envelopes. Do not group them together.)

Certified Mail must be turned in to the Mailroom by 3:00 for the 3:15 deadline. (Please see below for Certified Mail procedure.)

Express Mail must be posted by the mailroom and then the person requesting the service must take it to the Post Office by 3:00 in order to assure overnight delivery. (Please see below for Express Mail Procedures.)

Federal Express – (Please see next page regarding Federal Express Procedures and deadlines)

Bulk Mail – Use a post office that is closest to your school or department. (Please note: The Pomona Post Office no longer does Bulk Mail Service.) A purchase order to obtain a bulk permit number must be processed.
CERTIFIED MAIL PROCEDURES:
Certified mail forms (green cards) must be filled out by the individual sending it out. The Mail Room Clerk does not fill out the forms. The cards and stickers can be obtained for free from the Post Office, or contact the Postal Supply line at 1-800-527-1950 to order them. You can also order them via the Postal Service Website. An account is required but these items are free so you will not have to pay for them.

Please do not put sticker with the article number on the upper right hand corner of the envelope. This sticker goes DIRECTLY NEXT TO THE RETURN ADDRESS ON YOUR ENVELOPE. Make sure at least two inches of area is clear on the upper right corner of the envelope for postage to be applied. If this guideline is not followed your mail will be returned to you.

EXPRESS MAIL:
Express mail is sent out through the United States Post Office. The Mail Room posts mailings for Express Mail, but does not take the letters or packages to the Post Office. That is the responsibility of those departments sending out the letters and packages. Please note: EXPRESS MAIL MUST BE AT THE POST OFFICE BY 3:00 TO ASSURE OVERNIGHT DELIVERY. If it is not there on time, the letter and package will go out the next business day. (To order Express Mail or Priority Mail supplies please contact the US Postal Supply line at 1-800-527-1950, or go to the United States Postal Service web site to order that way.)

FEDERAL EXPRESS:
Federal Express is set up by department accounts. Each school site or department can set up an account with Federal Express by calling: 1-800-463-3339. THE MAILROOM CLERK DOES NOT SEND OUT FEDERAL EXPRESS. If you decide to go through Federal Express instead of Express Mail, it must be done through your account with FED EX. You may place your FED EX letters in the identified area outside the mailroom for pick up. (the deadline is 2:00)

For Education Center: Federal Express will pick up Education Center mailings between 3:00 and 4:30 pm. Please bring your letters and/or packages to the Mail Room no later than 2:00 to ensure pick-up. NOTE: DO NOT CONTACT FEDERAL EXPRESS FOR PICK UP. BRING TO MAIL ROOM BY 2:00 AND THEY WILL PICK UP YOUR MAIL BETWEEN 3:00 AND 4:30. IF YOU CONTACT THEM FOR PICK UP YOU WILL BE CHARGED EXTRA!!)

UPS AND FEDERAL EXPRESS DELIVERIES:
Fed Ex Ground or UPS returns or deliveries are not done through the Mail Room. Please contact the Warehouse at Ext. 3700 for instruction regarding these services.

INTER-DISTRICT MAILING:
In order to assure your correspondence gets to the right person in a timely manner, please indicate location of the recipient. Do not just put the person's name when sending items through the inter-district mail; indicate their location as well. This will help expedite the sorting of District Mail without undue delays.

DO NOT POST INTERDISTRICT MAIL WITH COMPLETE SITE ADDRESSES!!
Too many mailings have come into the mailroom with COMPLETE addresses for school sites and departments and they are mixed in with the stacks of mail to be POSTED. This is a waste of postage and it also means delays for your correspondence as those letters are sent out through the U.S. mail service.
Mail Room Procedures

Simply place the name of the recipient and their location within our school district on the envelope and separate them from any stacks of mailings to be posted. This will allow the distributors in the mailroom to know that it is Inter-district mail and NOT letters to be POSTED.

Be sure to inform any and all persons who assist you in addressing your correspondence to those within the District. There is no reason to put the entire school or department address on the envelope. If you are in need of inter-district envelopes, please contact the mailroom and request them via mailroom@pusd.org

The mailroom holds many stacks of envelopes and is always seeking to send them out.

REGISTRATION PACKETS:
Please remember the following procedures to ensure immediate processing of your Summer registration packets:
Make sure all manila envelopes are sealed and please use packing tape (refer to above on metal clasps on envelopes). (Scotch tape and masking tape will not hold and are not standard requirements from the Postal Service.)

Please make sure all addresses are right-side up and facing the same direction. Please do not put staples or paper clips in upper right hand corner of the envelope, as this is where the postage stamp is placed. Anything obstructing the stamping process may result in wasted postage and possible delays in your mail reaching its destination. Please be sure to insert your folded contents to where the actual fold is at the bottom of the envelope.

Whenever possible, please use envelopes that fit your Registration Packet contents. (Please try to avoid using over-sized envelopes. The use of over-sized envelopes will result in applying extra postage as per the new Postal regulations.)

SITE PICK-UP AND DELIVERIES:
Pomona Unified School District mail deliveries are done through the Warehouse. Any questions regarding pickups from your school site or department, deliveries, or questions regarding mail delivery scheduling, contact the Warehouse at (909) 397-4800 Ext. 3700

If your school site or department will be closed during any scheduled recess periods, i.e., Summer, Christmas, etc. you must contact the Warehouse and make arrangements if you require District mail services during those time periods.

PERSONAL MAIL:
Personal Mail is not to be sent through the District mail service. This includes bills, personal letters or mailings. If your bills are sent through the District mail they will be returned to you (If no name is given on the return address, personal bills will be sent out the next business day. Be aware: The District Mail Room is NOT responsible for personal mail reaching or not reaching its destination.)

Postage cannot be purchased through the Mail Room, and personal mail cannot be sent through the Mail Room to be posted. Be advised: Any suspicious mailings that are intercepted will be brought to the attention of your supervisor as well as to the supervisor of the Mail Room. If your location cannot be found in order for your mail to be returned to you, your mail will go through the postal service without postage. IT IS A MISAPPROPRIATION OF SCHOOL DISTRICT FUNDS FOR YOUR PERSONAL MAIL TO BE POSTED BY THE DISTRICT!
PERSONAL CORRESPONDENCE THROUGH INTER-DISTRICT MAIL SERVICE:
Please do not send personal correspondence through the Inter-district mail service. This includes presents or cards to other people in the District. If it is not associated with School District business it will be returned to you. The District Mail Room will not be responsible for any personal mail that is sent through the District mail service.
Records Destruction Procedures

The following information provides information and instructions of the destruction of Class 3 Documents:

(See below for description of what is considered **Class 3 – Destructible Documents**)

Sites or departments must fill out top-half of the Records Destruction Request Form for Class 3 Documents Upon completion of this form, please forward to Mail Room.

The Warehouse, upon review by the Mail Room of the Class 3 Documents Destruction Request Form, shall arrange with the site or department to pick up such documents for destruction and/or microfilming. The Warehouse shall weight all documents for total cost of destruction (Cost is based on ______ cents per pound.)

It shall be the site or department's responsibility, upon receiving costs for destruction, to forward a Purchase Requisition for account approval and processing through the Purchasing Department.

**DEFINITION OF CLASS 3 – DESTRUCTABLE DOCUMENTS**

Information taken from "Records Retention Manual K-12 and Community Colleges, Fourth Edition" (CASBO)

Classification of Records:
The school district's chief administrator shall be the person responsible for classifying school district records into the following classifications (California Administrative Code – Title 5, Sections 16020-16030):

Class 1 – Permanent Records (as listed in Section 16023) – The original, or one exact copy, unless microfilmed, shall be retained indefinitely.

Class 2 – Optional Records – Not required by law to be retained permanently but deemed worthy of further preservation as specified in Section 16024

Class 3 – Disposable Records – required retention periods and procedures for destruction or transfer of records as specified in Section 16025

While the required retention period for some records is dependent upon the date of the applicable audit, varying audit practices of federal, state, and other agencies must also be considered.

Additional information:

**Retention Period:**
(16026) A Class 3 – Disposable record shall not be destroyed until after the third July 1 succeeding the completion of the audit required by Education Code Section 41020 or of any other legally required audit, or after the ending date of any retention period required by any agency other than the State of California, whichever date is later.
Records Destruction Procedures

Continuing Records:
Records of a continuing nature, i.e., active and useful for administrative, legal, fiscal or other purposes over a period of years, shall not be classified until such usefulness has ceased. A pupil's cumulative record, if not transferred, is a continued record until the pupil ceases to be enrolled in the district.

A continuing record shall not be destroyed until the fourth year after it has been classified as Class 3 – Disposable.

TRANSCRIPT REQUEST PROCEDURE

The Mail Room requires 1-3 business days to process transcript requests. Please be advised: the Office Manager or Registrar must make certain all cards are sent to appropriate site for each student. Many times High School cards are sent to the Microfilm department WITHOUT the Middle School or Elementary School records. When people request their Middle School or Elementary cards, it ends up many times that those records cannot be found. Please be diligent with the processing of student records. Keep the records together in order that they may be filmed together when the time comes to send them to be microfilmed. (Note: only records within our school district. Those students who came from outside our school district, you do not need to worry about those records.)

Many schools have many years backlogged and they have not sent those records to be filmed. It is NOT THE MICROFILM DEPARTMENT'S RESPONSIBILITY TO KEEP TRACK OF THESE RECORDS. That responsibility rests with the school site. The Microfilm Department only films the records after the statute of limitations has been met regarding storage of records (3 years after student has left the school district.) The Microfilm Department can only film what is sent to them.
Year-end Cutoff Dates

The year-end cut-off dates are established based on prior year’s activities. The District is required to complete all financial transactions and “close the books” by June 30 of each fiscal school year. This close-out activity is the busiest and most stressful part of the financial year for Fiscal Services. To have a successful year-end closing, everyone involved in the process, from requisitioning, to final invoice payment, needs to assist wherever they can. A major part that Purchasing and Warehouse plays in the year-end process is to have all receiving documents to Accounting by June 30th, so they can pay the invoices in a timely manner to aid in closing the books. In order for this to happen, all previous steps of the procurement process must be complete. That includes, requisitioning, approval/review, budget check, order placement, vendor shipment, receiving, and order check-in.

The most efficient approach, (in lieu of the year-end surge), would be to submit Purchase Requisitions earlier in the year and not increase ordering at year-end. Those items that are budgeted for the school year should be requisitioned early in the year. In essence, we should operate more on a start-up surge, rather than a year–end surge.

*Attached is an example of prior years, year-ending cut-off dates.*
Sample Year End Letter

Pomona Unified School District
Business Services

Memorandum

Date: Month XX, 200X

To: District Wide

From: Nathaniel C. Holt, Director of Purchasing

Subject: Purchase Requisition Cut Off Dates

The Purchasing Department is preparing for the closing of fiscal year 200X-200X. In order to assure appropriate expenditure of current year funds and timely receipt of equipment and supplies, it is recommended that everyone plan accordingly.

We are requesting all sites, department heads, Requesters and authorizers to adhere to the Purchase Requisition cut-off dates listed below so that the Purchasing Department can issue all Purchase Orders from this year’s budget, in a timely manner.

To avoid last minute rushes and have your supplies arrive on a timely basis, please submit your properly completed Purchase Requisitions, including proper budget codes, on or before the listed dates. It is highly recommended that you begin submitting your Purchase Requisitions now, to avoid delays due to the volume of Purchase Requisitions being submitted at the deadline.

All Purchase Requisitions must be received, in the Purchasing Department, before the deadline, with a complete description of item(s) required, proper budget codes, verified by accounting for sufficient funds, and with the proper approval signature(s). Blank Purchase Requisitions will not be stamped in pending approvals or completion etc. – NO EXCEPTIONS! Purchase Requisitions will be processed in the order received. Purchase Requisitions received after the deadline will be returned to the respective site or department.

DO NOT WAIT UNTIL THE LAST MINUTE TO SUBMIT

Purchasing cannot be responsible for Purchase Requisitions that do not reach the Purchasing Department because they are stalled somewhere in the process due to budget code error or funding or some other problem.

SPECIAL NOTE TO SECONDARY SCHOOLS: Please advise all Assistant Principals, Department Heads, Athletic and Band Directors etc., of these cut-off dates.

SPECIAL NOTE TO ALL SCHOOL SITES AND DEPARTMENTS USING STUDENT PROGRAM INTERVENTION FUND: Those school sites and departments that are using categorical funding, must have their Purchase Requisition requests into Irene O’Brien’s office three weeks prior to the attached cut-off dates.
Sample Year End Letter

CUT-OFF DATES ARE AS FOLLOWS:

200X-200X Buy Outs:
Computer and related equipment and
Books and Software April XX, 200X
All Other Equipment, Supplies (not Books) May XX, 200X
Open (Blanket) Standing Orders (Open P.O.s)* June XX, 200X
Consultants or Service Providers, Field Trips,
Conferences, Travel, Lodging** May XX, 200X
Warehouse Stock Orders May XX, 200X
Facility Planning and M&O June XX, 200X

*Last day for use of Open Purchase Orders and to order on-line from Office Depot is June X, 200X. All receipts and Office Depot packing slips must be in accounting NO LATER THAN June XX, 200X.

**If board approval is required it must be obtained no later than May XX, 200X.

Summer School and Summer Programs:
Summer School and Summer Programs, for summer 200X, will need to purchase their start-up requirements out of their 200X-200X budget. Warehouse Stock Orders for these programs must be in no later than May XX, 200X.

200X-200X September Start Up:
All Purchase Requisition requests for athletic supplies, books, subscriptions, and equipment needed for the opening of school in September, must be into the Purchasing Department no later than the dates listed below. We request that you adhere to the following schedule in submitting requisitions for purchases from the 200X-200X budget. Items ordered for next fiscal year 200X-200X, will start to arrive the beginning of July XX, 200X through August. Be sure to clearly mark your requisition for fiscal year 200X-200X.

- Fall Sports Uniforms & Related Equipment March XX, 200X
- Subscriptions/magazines May XX, 200X
- Books to open school May XX, 200X
- Winter Sports Uniforms May XX, 200X
- Warehouse Stock Orders July XX, 200X

Should you have any questions, you may contact Grace Cabrera or Mina Young at (909) 397-4800, Ext. 3900.