

PURCHASING MANUAL

2018-2019



Absecon Board of Education

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ABSECON PUBLIC SCHOOLS

*Business Office
800 Irelan Avenue
Absecon, New Jersey 08201*

Office of Tina Maruca

School Business Administrator/Board Secretary/Purchasing Agent

June, 2018

TO: All District Employees

The purpose of this Purchasing Manual is to assist all Board of Education employees in the proper purchasing practices to be in full compliance with:

- New Jersey Public School Contract Laws Title 18A:18A, et. seq.;
- New Jersey Administrative Code N.J.A.C. 5:34 et. seq.;
- Board of Education Policy; and
- Other federal, state law and code.

The Purchasing Manual is designed to achieve three (3) goals:

1. Follow the law and Board policy on purchasing;
2. Promote efficiency in the purchasing practices; and
3. Achieve savings of money through proper purchasing practices.

We ask you, the user of the purchasing system, to help achieve these goals through proper planning. Please allow yourself enough leeway between generating a purchase order and the actual date materials or services are needed. Please think of purchasing in terms of a whole year. What items and services do you need on an annual basis?

Through proper planning, we can eliminate much of the frustration that is encountered in all public school purchasing procedures.

This manual should be reviewed with department heads, teachers, secretaries, and others who are involved in the purchasing process. It is imperative that everyone adhere to all purchasing laws and guidelines.

If you have any questions concerning the following guidelines, please do not hesitate to call the Business Office, Extension 1010.

Thank you,

Tina Maruca
Business Administrator/Board Secretary

PURCHASE REQUISITION/ORDER PROCEDURES

Authority to Purchase

The purchase of goods and/or services by a board of education is governed by state statutes, administrative code and board policy. New Jersey State Law (18A:18A-2(b)) assigns the authority to the Purchasing Agent to make purchases for the board of education.

The Purchasing Agent is the only individual in the school district that has the authority to make purchases for the board of education.

The Absecon Board of Education by board resolution has authorized Ms. Tina Maruca to be the Purchasing Agent for the school district.

Authorized Purchases

All requests for purchases of goods and/or services must be made through an approved purchase order signed by the Purchasing Agent.

A purchase order, pursuant to State Law, is a document issued by the Purchasing Agent authorizing goods or materials to be ordered for the school district or work/service to begin. No goods or materials may be ordered or work/service be authorized to begin by any other individual in the school district other than the Purchasing Agent.

Unauthorized Purchases

Any Board of Education employee who orders and/or receives any materials, supplies or services without first going through the approved purchase order process has made an unauthorized purchase.

Unauthorized purchases are a violation of State Law and Board Policy.

Penalties listed below may be assigned by the Superintendent of Schools for unauthorized purchases:

Penalties for Unauthorized Purchases

First Offense	Letter of Warning and Re-Training	Pay for Purchase or Pay for Return
Second Offense	Letter in Personnel File	Pay for Purchase or Pay for Return
Third Offense	Suspension	Pay for Purchase or Pay for Return
Fourth Offense	Loss of Increment	Pay for Purchase or Pay for Return
Fifth Offense	Loss of Employment Tenure Charges	Pay for Purchase or Pay for Return

Corrective Action for Non-compliance

If the Purchasing Agent has determined that an unauthorized purchase has been made, a memo will be sent to the responsible administrator advising the administrator of the unauthorized purchase.

The Superintendent of Schools shall receive a copy of the memo.

The responsible administrator shall prepare a memo explaining the reasons why proper purchasing procedures were not followed. The memo will be attached to the purchase order and a copy of the memo will be sent to the Superintendent of Schools.

Corrective Action for Non-compliance (continued)

At any time, during the Corrective Action Process, the Superintendent may invoke the penalties for non-compliance.

A repeat offense of an unauthorized purchase by the same administrator within a school year will mandate that administrator to attend a special in-service workshop on proper purchasing procedures and any sanction that may be invoked by the Superintendent.

Miscellaneous:

Preview of Materials

All staff members must receive permission from administrators, supervisors, or principals to preview materials. After the preview process has been completed, **the item must be returned**. If there is a desire to purchase the previewed item, then a purchase order must be prepared for a new item.

Reimbursements; Employee

The Board of Education only recognizes an employee reimbursement purchase order when it pertains to pre-approved travel, meals, and conferences, pre-approved tuition reimbursement and optical expenses. **The Board will not reimburse employees for items and goods personally purchased by the employee.**

Student Activity Accounts

Purchases made through Student Activity Accounts may not be reimbursed with Board funds. Purchase orders made payable to Student Activity Accounts for the aforementioned purpose will not be signed by the Purchasing Agent.

Business Registration Certificate (Required for Vendors in Excess of Quote Threshold in the Aggregate)

Vendors must be registered in the State of New Jersey before a district can issue a purchase order. In order expedite the process:

1. Contact the Business Office to determine if Business Registration Certificate (BRC) is on file;
2. If no BRC on file, have the vendor fax a copy of their BRC to Mila Melton at 609-641-8692 or email to mmelton@abseconschools.org.
3. If no BRC available, have the vendor contact the Business Office for more information. Obtaining an BRC is free and takes only a few days to process.

A. Responsibilities of Originator of Purchase Requisition - Preparing a Purchase Requisition

The person who prepares the purchase requisition has certain responsibilities before the order is sent to the administrator, supervisor, or principal for approval. He/She is to ensure the following:

1. **Purchase Requisitions** - All purchase requisitions are to be initiated through the Edmunds Finance Software. Please contact the Business office to establish access to this feature.
2. **Vendor's Name**--All Board checks are made payable to the vendor name (top line) listed on the purchase requisition. Please ensure the proper vendor name is printed on the purchase requisition.
3. **Vendor's Complete Address**--The purchase requisition must include the vendor's complete address and phone number. Post Office Box addresses by themselves are not acceptable unless they are of major well-known companies.
4. **Current Budget Year Included**--The current budget year must be included in the space provided.
5. **Description of Items, Services, Costs and Catalogue Numbers**--Items and/or services requested are to be described clearly with correct and up-to-date catalogue numbers and costs. Please use latest catalogues available.
6. **Shipping Costs**--Shipping and handling costs are to be added to all purchase requisition unless specifically stated that shipping is not applicable. Please read the catalogue or contact the vendor to determine the actual shipping and handling costs.

If you are unable to ascertain the actual charges, type

"10% Estimated Shipping and Handling"

If there are no shipping and handling charges, type on purchase requisition

"Shipping and Handling Included."

7. **Delivery Address--Attention Of**--The delivery address should include a name of a person or a specific department.
8. **Delivery, Types of**

The Absecon Board of Education recognizes two (2) types of delivery.

a. INSIDE DELIVERY

Items are to be delivered to a Board of Education location and taken off the truck by transportation carrier personnel and brought to a designated area inside the school or office building.

b. SPOTTED DELIVERY

Items are to be delivered to a Board of Education location and taken off the truck by transportation carrier personnel and brought to a designated area inside the school or office building. Transportation carrier personnel or specialized individuals are responsible to then uncrate, setup, assemble items to determine good working order and remove all debris to the satisfaction of the Absecon Board of Education within five (5) working days. Please ensure that all purchase requisitions have the correct delivery designation.

9. **State Sales Tax** -- The Board of Education is exempt from paying New Jersey Sales Tax. Sales exempt certificates are available to vendors upon request.
10. **Budget Account Number**--Please be sure the correct Budget Account Number is typed on the purchase requisition. Incomplete requisitions will be returned unprocessed.
11. **State Contract Orders**--When ordering through State Contract vendors (minimum order \$100.00) please include:
 - a. State Contract Number;
 - b. Shipping and Handling Included; and
 - c. Appropriate documentation when required.
12. **Quotations** – Quotations may be required to be obtained for all orders over \$3,500 or if vendor will be used multiple times during the year and the aggregate purchases will exceed \$3,500. When quotations are obtained, please attach to the purchase requisition a copy of each written quotation received. Please indicate on requisition that quotations are attached.
13. **Bids** – Bids may be required for purchases in excess of \$17,500. Please contact the Purchasing Agent to make arrangements for purchases that may require to be bid.
14. **Prohibited Items** – Items that are prohibited as purchases from Tax payer dollars. These purchases may be permitted from Local Grant funds as approved.
 - Catering – (coffee, cookies, etc.);
 - Celebration or Decorative Items – including but not limited to:
 - *Balloons*
 - *Flowers; floral arrangements*
 - *Gift Baskets*
 - *Gifts for employees; teacher appreciation*
 - *Greeting cards*
15. **Reimbursements** -- Requisitions are due in the Business Office by June 1st of the school year for all reimbursements that are applicable to said school year. Prior year reimbursement requests cannot be approved.
 - **Travel Reimbursement for Employees**

Travel reimbursement costs are regulated by state law, state administrative code and board policy. All conditions and approvals for this reimbursement must be met in order for the purchase requisition to be approved. Post travel report must be received by Supervisor prior to reimbursement.
 - **Tuition Reimbursement for Employees**

All conditions and approval for tuition reimbursement must be met in order for the purchase requisition to be approved.

C. Responsibilities of Administrator/Supervisor or Principal

Administrators/supervisors and principals must ensure the following before the purchase requisition is sent to the Superintendent:

1. **Funds Available**
They must check to determine if *funds are available* in their budget to cover the purchase requisition.
2. **Purchase requisition completion**
They must check to determine that items 1-15 previously noted (Responsibilities of the Originator) have been *properly completed*.
3. **Signature on Purchase requisition**
The purchase requisition must be signed in ink or electronic authorization and *sent to the Superintendent's Office*. By signing the purchase requisition, the administrator/supervisor or principal is certifying that funds are available in the budget account line to cover the cost of the purchase.
5. **Principal Copy (White)**
The originator copy (white) of the purchase order will be returned to the originator after the purchased order has been processed.
6. **Receiving Copy (Goldenrod)**
Once the purchase order has been posted and mailed to the vendor, the Business Office will send the Receiving Copy (Pink) of the purchase order back to the school or office. Upon receipt of goods, attach packing slip or invoice to the pink copy and return to the Business Office for payment authorization.

D. Responsibilities of Business Office

The Purchasing Agent reviews each purchase order. Special attention is given to the following:

1. **Available Funds**-- Purchase orders are checked to determine if funds are available in the account. If not, the purchase order is returned to the originator with a memo of explanation.
2. **What is being ordered and the cost**--The Purchasing Agent reviews the technical aspects of the purchase order to ensure compliance with State Law and Board Policy.

The Business Office will check the cost of each item and determines if it can be purchased from another vendor at a savings. The Business Office also reviews whether the purchase order exceeds:

The Quotation Limit **\$6,000.00**

The Bid Limit is **\$40,000 or \$17,500 (as applicable)**

3. **Document Check – State Law**

Pursuant to various State Laws, the Purchasing Agent must ensure the following documents are on file in the Business Office before the purchase order is signed and processed:

- Affirmative Action Evidence – Contracts \$25,000.00 and over (cumulative).
- Business Registration Certificate (BRC) – Purchases \$6,000.00 and over.
- Chapter 271 – Political Contribution Disclosure Form (PCD) * Purchases over \$17,500.00 (cumulative).

*Administrators recommending contracts for professional/educational services are to secure the Chapter 271 PCD from the vendor when the vendor submits his/her proposal. The PCD must be forwarded to the Business Office.

A copy of the PCD is in the Appendix.

4. **Review of Purchase Order**--The purchase order is also reviewed for technical aspects such as:

- a. Account numbers charged;
- b. Shipping charges added;
- c. Signatures;
- d. State contract numbers if applicable;
- e. Quotes if applicable;
- f. Vendor address;
- g. Business Registration Certificate; and
- g. Other items as listed in Section A.

Incomplete or improper purchase orders will be returned with a memo explaining deficiencies.

If the Purchasing Agent is satisfied, the purchase order is then signed. The Business Office will then:

- Issue a purchase order number;
- Issue a vendor number;
- Enter the purchase order in the computer; and
- Mail the purchase order to the vendor.

The purchase order process once received by the Business Office may take 5 days to process. Please plan accordingly.

5. **Transfer of Funds** -- The Business Office processes purchase requisitions only if there are appropriate funds to cover the purchase. Purchase requisitions lacking sufficient funds are sent back to the originator for a request to transfer funds. All letters requesting a transfer of funds are to be sent to

Tina Maruca, Business Administrator

All transfers of funds have to be approved by the Board of Education at a public meeting. Please plan accordingly.

F. Responsibility of the Vendor

The Business Office sends to the vendor the purchase order and the voucher. The vendor is to sign the voucher and return it to the Business Office with an invoice. If you receive a signed voucher, return it to the Business Office. A check is prepared for the vendor once the Business Office has a

- Signed Voucher
- All Packing Slips
- Invoice
- Receiving Copy (Goldenrod)Signed

G. Employees Prohibited from Signing Contracts

Board of Education employees are prohibited from signing any contract offered by a vendor.

The power to sign and execute contracts after Board of Education approval lies with the Board President and the Board Secretary.

Contracts signed by an employee shall be considered non-binding by the Absecon Board of Education with the employee accepting full responsibility for the costs of the contract.

H. Contracts; Purchase Order Required

The award of contract to a vendor approved by the Board of Education at a public meeting does not automatically authorize any employee to use the services of, or purchase materials from, the vendor.

All contract purchases require the issuance of a purchase order authorizing the purchase of services and/or goods and materials from the vendor.

I. Cancellation of Purchase Orders

All requests to cancel purchase orders must be made in writing to the Business Office. Reasons explaining the need to cancel the purchase order must be outlined. The Purchasing Agent maintains the sole right to cancel purchase orders.

J. Private Purchases -- Prohibited

Goods and services procured by the Absecon Board of Education are exclusively for the use of the Absecon Board of Education and if applicable, other public and non-public schools. These goods and services are purchased through the signed purchase order process.

Employees of the Absecon Board of Education are prohibited from purchasing privately goods and/or services off the bid prices and quotation prices offered by the vendors to the Absecon Board of Education.

BIDS AND PURCHASING

A. Bid Limit -- \$17,500 to \$40,000

The Absecon Board of Education is restricted by New Jersey State Law on how much money can be spent by the district for the entire year on materials, supplies, and services.

This restriction is called the **bid threshold** or **bid limit**. The bid limit ranges from \$17,500 to \$40,000. The \$40,000 relates to any specific item, class of items, and/or services of a similar nature, purchased by the school district totaling more than \$40,000 for the entire year must be competitively bid and/or required additional specific documentation. In addition, pay to play laws require an open and fair process or bid once a threshold of \$17,500 is met by vendor. This restriction is for the entire district and not by location or schools.

You cannot circumvent the law by splitting purchases to be under the bid limit.

If you find that your purchases may exceed the bid limit, please contact the Business Office at once.

The formal bidding process takes about 6-8 weeks to complete.

B. Annual Bids

The Board of Education requests that administrators and supervisors and school principals start to plan and prepare for Annual Bids. The proposed time lines are as follows:

- March* • Administrators/Supervisors prepare technical specifications to be reviewed by Purchasing Agent.
- April* • Purchasing Agent prepares final bid specifications to be drafted in a manner to encourage free, open, and competitive bidding.
- May/June* • Annual bids are received, opened and tabulated by Purchasing Agent.
- June* • Bid resolutions are prepared by Purchasing Agent for Board approval.
- July* • Purchase orders are generated by Administrators/Supervisors for August/September delivery.

Please note: The delivery of furniture usually takes place about 8-12 weeks after receipt of purchase order.

C. Bidding: Time Frame

As stated before, the formal bidding process usually takes about 6-8 weeks from start to finish. Please plan appropriately. An outline of the bidding process is located in the Appendix.

D. Exceptions to the Bid Limit

New Jersey State Law allows for some exceptions to the bid and quotation limits. There are approximately 20 exceptions where a Board of Education does not have to go for bid. Some of them are:

1. Purchasing through State Contract;
2. Professional services as outlined by New Jersey law;
- *3. Textbooks, kindergarten supplies, student produced publications, library and educational goods;
- *4. Legal notices, food supplies, milk, utilities, insurance, election expenses, travel and conferences.

* These purchases may be subject to the quotation process pursuant to N.J.S.A. 18A:18A-37(a) if practicable.

Please contact the Purchasing Agent for further explanation.

E. State Contract Purchasing

Pursuant to N.J.S.A. 18A:18A-10(a) a Board of Education may purchase goods and services through State Contract vendors. If the purchase exceeds the bid threshold, the Board of Education must adopt a resolution awarding the contract.

A form (Form A-1) has been developed to help complete this requirement.

❶ *Office Supplies and School Supplies*

The Purchasing Agent will distribute separate memos highlighting State Contract vendors who sell Office Supplies and School Supplies. Please review these memos with your staff.

If you plan to purchase Office Supplies and School Supplies from a State Contract vendor, please follow the instructions on the memo.

❷ *Computers & Technology*

If you plan to purchase computers or technology related items, please adhere to the following process prior to completing purchase orders for computers or technology related products.

- Contact the Supervisor of Technology

Please contact the **Supervisor of Technology at Ext. 1016**. He will be able to assist you with the technical aspects and the State Contract requirements of purchasing computers or technology related products.

The Supervisor or his designee must sign all purchase orders for computers or technology related products before they are sent to the Superintendent.

- Contact the Director of Facilities

Please contact the **Director of Facilities, at Ext. 1038**. The Director has to be apprised of all computer or technology related purchases to properly plan for electrical hookups. The Director must sign all purchase orders for new computers or technology related products requiring electrical upgrades before they are sent to the Superintendent.

E. State Contract Purchasing (continued)

Purchase Orders--State Contract

All purchase orders made through State Contract vendors shall include the following:

1. State Contract Number;
2. Notification of Award;
3. Approved Price List; and
4. Shipping and Handling Included.

F. Professional Services/Professional Consultants

Although Professional Services, as defined in Title 18A:18A-5, do not require competitive bids or quotations, it is in the best interest of the Board of Education to obtain at least three (3) proposals for any professional service.

If proposals are to be obtained, they are to be sealed proposals and may be scheduled to be opened publicly. This scheduling, together with the text of the solicitation for proposals, is to be reviewed with the Purchasing Agent.

Professional Contracts/Educational – Board Approval Needed

All Professional Services and Consultant Contracts must be approved by the Absecon Board of Education if the contract exceeds \$6,000. If you plan to recommend a contract for a professional consultant, please be advised of the following:

1. An appropriate resolution must be written for placement on the Board of Education meeting agenda.
2. With the resolution should be a written proposal from the consultant and/or vendor outlining the following:
 - a. Name, address of consultant/vendor (No P.O. Box #'s);
 - b. A description of services to be provided;
 - c. Starting date of service; ending date of service; and
 - d. The cost of the services/terms of payment(s).

3. Chapter 271 Political Contribution Disclosure Form (PCD)

It is the responsibility of the administrator/supervisor recommending the contract to provide to the Business Office a copy of the vendor's Chapter 271 Political Contribution Disclosure Form.

4. Legal Advertisement -- Prepare Form

Contract for professional services that exceed the bid threshold must be advertised in an official newspaper. A form has been developed to complete this requirement.

All resolutions are to be sent to the Superintendent's Office with a copy of the written proposal attached. A copy of the resolution and proposal should be sent to the Board Secretary. A written contract will be prepared.

G. Emergency Contracts

Emergency Contracts are strictly regulated by N.J.S.A. 18A: 18A-7. A situation must exist affecting the health or safety of the occupants of school property that requires the immediate delivery of articles or the performance of a service to alleviate the emergency.

The Emergency Contract process is reviewed in the Appendix. Please note that the Superintendent of Schools must be notified **first** of all emergency purchase requests.

Only the Purchasing Agent may award an Emergency Contract.

H. Cooperative Purchasing

The Absecon Board of Education has joined the following purchasing cooperatives to bid on items in a variety of categories on an as needed basis. These include, but are not limited to Office Supplies, Classroom Supplies, Technology Supplies, Custodial supplies and equipment.

Educational Data Purchasing Consortium
Educational Services Commission of New Jersey
Camden County Educational Services Commission
Hunterdon County Educational Services Commission.

Please contact the Business Office for more information on Cooperative Purchasing arrangements.

The Absecon Board of Education will join with Atlantic County to cooperatively purchase items throughout the year. The following categories have been approved in the past. Please check with the Business Office for available cooperative purchasing.

1. Custodial Supplies and Equipment
2. Printing needs.
3. Library Supplies

I. Purchases, Contracts Exceeding the Bid Threshold

Pursuant to State Law N.J.S.A. 18A:18A-5 all purchases and contracts exceeding the bid threshold of \$40,000, shall be awarded by board resolution at a public meeting of the Board of Education. This includes all items exempted from bidding and all State Contract purchases that exceed \$40,000. Only the purchase of textbooks and emergency contracts are exempt from this law.

Administrators and Supervisors must anticipate their needs as certain purchases once allowed just by purchase order now must be approved by the Board of Education first, then a purchase order can be signed and mailed.

J. Student Activity Account Purchases

Pursuant to State Law N.J.S.A. 18A:18A-5a(21), purchases made through Student Activity Accounts that exceed the bid threshold shall be awarded by the Board of Education at a public meeting.

Examples of items purchased through the Student Activity Accounts that may exceed the bid threshold are

- Field Trips
- Yearbooks

A form has been developed to meet this requirement.

K. Increasing the Purchase Order Amount—Change Orders

There may be times where the original purchase order contract amount, for work performed or services rendered, will have to be increased. To increase the purchase order amount the administrator will have to follow the Change Order Process.

Change Order Process

In accordance with N.J.A.C. 6A:23-7.1 et. seq., increases in the total contract amount of a purchase order for work performed or services rendered are to be made through the Change Order Process, prior to the need to increase the amount.

- Request for Change Order Form – Prior to the Need
Any administrator or supervisor requesting to increase a purchase order for work performed or services rendered shall complete a Request for Change Order Form, prior to the need to increase the amount.

A copy of the form is in the Appendix.

- Scope of Original Contract
All change order requests shall be within the scope of the activities of the original contract and not for the purpose of undertaking new or different work or service.
- Certification of Funds
The Business Administrator and/or his designee shall certify that funds exist to pay for the increase.
- Authorization Required
In accordance with N.J.A.C. 6A:23-7.1(a-4) responsibility for approving change orders for services rendered or work performed shall be exercised by the Board of Education, unless so delegated by Board of Education resolution to a certain school official.

Points of Concern – Board Review – Approval; Denial

- Approval Granted
Once the Change Order approval is granted by the Board of Education, the Accounts Payable Department shall prepare a purchase order for the approved increase.
- Request Denied
If the request to increase the purchase order is denied, the administrator/supervisor shall notify the vendor that all work or service is to cease.

QUOTATIONS AND QUOTATION PROCEDURES

A. Quotations

The quotation limit (threshold) is now \$6,000. This means that any specific item or group of items of a similar nature purchased by the school district, totaling more than \$6,000 and less than \$40,000 for the entire year, must be *competitively quoted or advertised for bid at the discretion of the Purchasing Agent*.

You cannot circumvent the law by splitting purchases to be under the quote threshold.

B. Quotation Process

All quotations will go through the Office of the Purchasing Agent except for the Building Services Department. Quotation proposals prepared by Building Services shall first be received and approved by the Purchasing Agent. When a quotation is deemed necessary, the Principal or Department Head is asked to contact the Purchasing Office. The Purchasing Agent will review these quotation specifications to determine whether they are set up to provide open and competitive quotations.

Please note: The formal quotation process could take about 2-4 weeks from start to finish.

There will be no telephone quotations except in a case of extreme urgency.

C. Receipt of Two Quotations

Pursuant to N.J.S.A 18A:18A-37(a) the school district shall receive two quotations if practicable. Evidence of the quotation process shall be kept on file. A copy of the quotation shall be attached to the purchase order. However, please make every attempt to obtain three quotations.

PURCHASE ORDER PROCESS

A. Processing the Purchase Order--Design of Purchase Order

The purchase order is made of five sheets, each color-coded for a certain purpose. Listed below are the names of the appropriate color and the purpose of each sheet.

<u>Copy</u>	<u>Color</u>	<u>Disposition</u>
Vendor Copy	White (top)	Sent to vendor to order items/provide services
Voucher Copy	White (2 nd)	Sent to vendor for signature
Receiving Copy	Pink	Sent to school/office; returned to Business Office upon receipt of goods/services
Authorization Copy	Goldenrod	Signatures authorizing purchase remains on file in the School Principal Office
Requestor Copy	Yellow	Remains with originator.

B. Receipt of Goods and Services

The originator of the purchase requisition should follow the following process when receiving materials, goods, and services.

1. Receipt of Items Ordered

It is important that all items received be immediately checked. Please note the following:

- a. Obtain receiving copy (pink) of purchase order and packing slip of items ordered.
- b. Open boxes and check off items received on the receiving copy and the packing slip.
- c. If all items are enclosed, then sign and attach packing slip to the receiving copy of the purchase order.
- d. The school principal/office supervisor should sign the receiving copy (pink) and send it with the packing slip to

Mila Melton, c/o Business Office

All receiving copies (pink) of purchase orders and packing slips should be signed and sent to the Business Office within seven (7) days of receipt of items.

The Absecon Board of Education has an excellent reputation for paying its bills in a timely fashion. We ask that all employees assist in maintaining this fine reputation.

B. *Receipt of Goods and Services (continued)*

2. *Problems Encountered with Receipt of Goods*

✚ **Problem: Back Orders**

Sometimes items ordered will not be received in the first shipment. This is known as a back order. The packing slip will have back order written on those particular items.

Process to Follow: Back Orders

If the order is incomplete because there is a back order, do not wait for the next shipment. Please do the following:

- Mark on your receiving copy (pink) of the purchase order those items you did not receive.
- Make and keep a copy of your receiving copy (pink) and the packing slip.
- Send the original receiving copy (pink) and packing slip to the Business Office.
- Upon receipt of the back order in the next shipment, check off your copies of the receiving copy (pink) and the packing slip and send both copies to the Business Office.

✚ **Problem: Items Missing from Order**

Sometimes items are marked on the packing slip that they were delivered but are missing from your shipment.

Process to Follow: Items Missing

- Call the company and tell them what was missing.
- Mark on the receiving copy and packing slip what items were missing.
- Make and keep a copy of your receiving copy (pink) and the packing slip.
- Send the original receiving copy (pink) and packing slip to the Business Office.
- Upon receipt of the missing item in the next shipment, check off your copies of the receiving copy (pink) and the packing slip and send both copies to the Business Office.

✚ **Problem: Items Damaged; Wrong Item**

Sometimes you will receive items that are damaged or the wrong item.

Process to Follow: Items Damaged; Wrong Item

- Call the company and ask them what the procedure is for returning damaged or wrong items.
- Return the item(s) to the company.
- On the receiving copy (pink) and the packing slip, mark what items were returned and the reasons for being returned. Please note how the items were returned (UPS/PO/Vendor Pick Up).
- Send the receiving copy and packing slip to the Business Office.
- Upon receipt of the missing item in the next shipment, check off your copies of the receiving copy (pink) and the packing slip and send both copies to the Business Office.

B. *Receipt of Goods and Services (continued)*

2. *Problems Encountered with Receipt of Goods*

Discontinued Item

Sometimes the items you requested have been discontinued. Please follow this process for Discontinued items:

- Mark on the receiving copy (pink) of the purchase order “discontinued.”
- Do not call the company for a replacement item. You must complete a new purchase order.

C. *Purchase Order Cut Off Date*

Administrators and Supervisors are to be alerted to the fact that purchase orders for the present school year will not be accepted after the *second Friday of May*. This excludes reimbursements for travel, optical and tuition.

ETHICS IN PURCHASING

Financial Interest in any Contract; Direct or Indirect

No employee or board member may have a direct interest in any contract or agreement for the sale of goods and services to the Board of Education, nor receive any benefit, compensation or reward from any contract for the sale of goods and services to the Board of Education.

Reference—N.J.S.A. 18A:6-8.

Solicitation/Receipt of Gifts from Vendors -- Prohibited

School board members, school officials and employees, or members of their immediate family are prohibited from soliciting, receiving or agreeing to receive any compensation, reward, employment, gift, meal, honorarium, travel, reimbursement, favor, loan, service, or other thing of value from any person, firm, corporation, partnership, or business that is a recipient of a purchase order from the district, or a potential bidder, or an applicant for any contract with the district, based upon an understanding that what is solicited or offered was for the purpose of influencing the board member or school employee in the discharge of their official duties. This policy shall be consistent with the School Ethics Act—N.J.S.A. 18A:12-21 et. seq.

Reference—N.J.A.C. 6A:10-2.1 (7f); Board Policy 6460

School District Responsibility – Recommendation of Purchases

School officials and employees who recommend purchases shall not extend any favoritism to any vendor. Each recommended purchase should be based upon quality of the items, service, price, delivery, and other applicable factors in full compliance with N.J.S.A. 18A:18A-1 et. seq.

School officials and employees are to avoid recommending purchases from members of their families, businesses that employ members of their families and from businesses in which the official, employee or members of their immediate family have a direct financial interest.

School officials and employees who are authorized to sign off on purchase orders and/or to recommend purchases or business transactions by virtue of their signature on the purchase order certify that their actions are consistent with this policy and all applicable statutes.

Reference — N.J.A.C. 6A:10-2.1 (7f); Board **Policy 6460**

Vendor Responsibility – Doing Business with the Board of Education

Any vendor doing business or proposing to do business with the Absecon Board of Education, shall neither pay, offer to pay, either directly or indirectly, any fee, commission, or compensation, nor offer any gift, gratuity, or other thing of value of any kind to any official or employee of the Absecon Board of Education or to any member of the official's or employee's immediate family.

No vendor shall cause to influence or attempt to cause to influence, any official or employee of the Absecon Board of Education, in any manner which might tend to impair the objectivity or independence of judgment of said official or employee.

Ethics in Purchasing (Continued)

Vendor Certification

Vendors will be asked to certify that no official or employee of the Absecon Board of Education or immediate family members are directly or indirectly interested in this request or have any interest in any portions of profits thereof. The vendor participating in this request must be an independent vendor and not an official or employee of the Absecon Board of Education.

Violations of the Policy

In accordance with N.J.A.C. 6A:10A-4.1(f)iii, and N.J.S.A. 18A:6-8, any school district employee who violates the terms of this policy may be subject to withholding of annual increments, suspension, demotion, school ethics complaint, termination and/or revocation of license to teach or to administer.

Reference Board Policy—N.J.A.C. 6A:10-2.1 (7f); Board **Policy 6460**

CRIMINAL CODE CITATIONS

Title 2C -- Criminal Code

2C:27-9 Unlawful Official Business Transaction

“A public servant commits a crime of the fourth degree if, while performing his official functions on behalf of the government entity, the public servant knowingly transacts any business with himself, a member of his immediate family, or a business organization in which the public servant or an immediate family member has an interest. (N.J.S.A. 2C:27-9)

2C:27-10 -- Acceptance or Receipt of Unlawful Benefit by Public Servant for Official Behavior

“A public servant commits a crime in the fourth degree...if the public servant directly or indirectly, knowingly solicits, accepts or agrees to accept any benefit, whether the benefit inures to the public servant on another person, to influence the performance of an official duty or to commit a violation of an official duty.

APPENDIX

- A. Formal Bid Process
- B. Emergency Purchases/Contracts
- C. Memorandum--Return of Purchase Order
- D. Request for Change Order
- E. Political Contribution Disclosure Form (PCD)
- F. List of Agencies With Elected Officials Required for PCD

FORMAL BID PROCESS

<u>Process</u>	<u>Time Line</u>
Initial request to bid made by Administrator/Supervisor. Certification that funds exist.	One Day
Review of specifications, fully outlining items, materials or services to be bid by Purchasing Agent.	One Week
Return of reviewed specifications to Administrator/Supervisor for final approval. Administrator/Supervisor signs off final approval.	One Week
Bid package prepared by Purchasing Agent.	One Week
Copies of bids run off by Business Office.	One Day
Legal advertisement sent to newspaper.	Five Day Advance Notice
Bid Date/Time-- must be at least 10 days after Legal Ad appears in newspaper. Bids are opened and read publicly.	10-20 Days
Bid results are reviewed by: a. Administrator/Supervisor b. Purchasing Agent	One Week
Administrator/Supervisor prepares spreadsheet showing lowest bidders and recommends award of bid. Purchasing Agent reviews bids. Resolution is prepared.	One-Two Weeks
Bids are reviewed at Board Agenda, Committee of the Whole, and Regular Public Meetings.	One Week
Purchase orders are prepared by Administrator/Supervisor.	One Week

The formal bidding process takes about 6-8 weeks from start to finish.

Please note: Bids for Public Works/Construction Projects take longer as a request for wage determination must be formally made to the State of New Jersey.

EMERGENCY CONTRACTS (18A:18A-7)

A. Background

An actual emergency must exist. An “emergency” is not to be created as a result of inadequate planning, delay, failure to take into account construction season or administrative convenience.

B. Definition of Emergency

An emergency is a situation affecting the health or safety of occupants of school property that requires the immediate delivery of the articles or performance of a service to alleviate the emergency.

C. Process in Declaring an Emergency

1. Superintendent of Schools Notified

The Superintendent of Schools is notified by the employee/supervisor/ administrator requesting a declaration of emergency.

2. Business Administrator/Purchasing Agent Notified

The official in charge of the building or facility, wherein the emergency occurred shall notify the Business Administrator/Purchasing Agent of the following:

- a. Nature of the emergency;
- b. Time of the occurrence; and
- c. The need for the performance of a contract.

Such notification shall be prepared in writing and filed with the Purchasing Agent as soon as possible.

3. Awarding of Contract by Business Administrator/Purchasing Agent

If the Business Administrator/Purchasing Agent is satisfied the emergency exists, the Business Administrator/Purchasing Agent by State Law is authorized to award the contract.

4. Filing of Documents with State and County by Board Secretary/School Business Administrator

In accordance with N.J.A.C. 5:34-6.1, the following documents must be filed with the Bureau of Facility Planning and the County Superintendent within three (3) days after awarding the contract or agreement:

- a. A copy of the contract or agreement; and
- b. A copy of the written requisition.

5. Approval by Board of Education

The Board of Education, at its next regular Board of Education Public Meeting, shall review and approve said emergency purchase.

ABSECON BOARD OF EDUCATION

BUSINESS OFFICE

Absecon, New Jersey 08201

MEMORANDUM

To: _____

From: **Tina Maruca**, Business Administrator/ Board Secretary

Date: _____

Re: ***Return of Purchase Order(s)***

I am returning the attached purchase order(s) for the reason(s) checked below:

- _____ Account Number Incorrect; Missing--Please use Account Code
- _____ Chapter 271—Political Contribution Disclosure Form Required
- _____ Overnight Travel/Conference Request Form--Not Attached; Not Approved
- _____ Description of Item(s), Service Needed
- _____ Date of Requisition Missing
- _____ Proposal/Contract Missing -- Attach to Purchase Requisition
- _____ Quotation Needed--Please contact me X 6707 to discuss process
- _____ Shipping Charges Not Added or Type “Shipping and Handling Included”
- _____ Signature Missing--Administrator, Supervisor, Principal
- _____ State Contract Number Incorrect, Missing--State Contract Documentation Missing
- _____ Unauthorized Order--Please contact me X 6707 to discuss procedures
- _____ Vendor Address Incomplete
- _____ Other

Please make the adjustments needed and return the purchase order with this form to my office.

**ABSECON BOARD OF EDUCATION
BUSINESS OFFICE
800 Irelan Avenue
ABSECON , NJ 08221**

**REQUEST FOR CHANGE ORDER
(Services; Work Provided)**

I hereby request an increase to the total amount of the contract through the change order process for

Name of Vendor _____ PO # _____

Address _____

City, State, Zip _____

who was awarded a contract on _____ to provide the following work/services

_____.

Original Award of Contract \$ _____

Increase Requested \$ _____

Revised Total \$ _____

Reason for Request to Increase _____

Name of Administrator _____

Signature

Date

A copy of the purchase order shall be attached to this form!

This form shall be submitted to: Tina Maruca
School Business Administrator

Certification of Funds – School Business Administrator/Designee

In accordance with N.J.A.C. 6A:23-7.1 (c-3), I hereby certify that funds exist in Account # _____
to support this increase.

School Business Administrator/Designee Date

Board Approval/Denial (required for Construction Contracts & Contracts under the Bidding Process)

In accordance with N.J.A.C. 6A:23-7.1 (a-4), the Board of Education Approved Denied
the request to increase the total amount of the contract at the _____ Board of Education
meeting.

School Business Administrator/Designee Date

**Absecon Board of Education
Business Office**

800 Irelan Avenue
Absecon, New Jersey 08201

**Chapter 271
Political Contribution Disclosure Form
(Contracts that Exceed \$17,500.00)
Ref. N.J.S.A. 52:34-25**

Part I – Vendor Information

Vendor Name:			
Address:			
City:	State:	Zip:	

The undersigned being authorized to certify, hereby certifies that the submission herein represents compliance with the provisions N.J.S.A. 19:44-20.26 and as represented by the Instructions accompanying this form.

Signature Printed Name Title

Part II – Contribution Disclosure

Disclosure requirement: Pursuant to N.J.S.A. 19:44A-20.26 this disclosure must include all reportable political contributions (more than \$300 per election cycle) over the 12 months prior to submission to the committees of the government entities listed on the form provided by the local unit.

Check here if disclosure is provided in electronic form.

<u>Contributor Name</u>	<u>Recipient Name</u>	<u>Date</u>	<u>Dollar Amount</u>
			\$

Check here if the information is continued on subsequent page(s).

No Reportable Contributions (Please check (✓) if applicable.)

I certify that _____ (Business Entity) made no reportable contributions to any elected official, political candidate or any political committee as defined in N.J.S.A. 19:44-20.26.

**List of Agencies with Elected Officials Required for Political Contribution Disclosure
N.J.S.A.19:44A-20.26**

County Name: Atlantic

State: Governor, and Legislative Leadership Committees

Legislative District #: 1, 2, & 9

State Senator and two members of the General Assembly per district.

County:	Freeholders	County Executive	
	County Clerk	Surrogate	Sheriff

Municipalities (Mayor and members of governing body, regardless of title):

Absecon City	Atlantic City	Brigantine City
Buena Borough	Buena Vista Township	Corbin City
Egg Harbor City	Egg Harbor Township	Estell Manor City
Folsom Borough	Galloway Township	Hamilton Township
Hammonton Town	Absecon City	Longport Borough
Mullica Township	Northfield City	Pleasantville City
Port Republic City	Somers Point City	Ventnor City
Weymouth Township		

Boards of Education (Members of the Board):

Absecon City	Atlantic City	Buena Regional
Egg Harbor City	Egg Harbor Township	Estell Manor City
Folsom Borough	Galloway Township	Greater Egg Harbor Regional
Hamilton Township	Hammonton Town	Longport
Mainland Regional	Mullica Township	Northfield City
Pleasantville City	Somers Point City	Weymouth Township

Fire Districts (Board of Fire Commissioners):

Buena Borough Fire District No.1
Buena Borough Fire District No.2
Buena Vista Township Fire District No.1
Buena Vista Township Fire District No.2
Buena Vista Township Fire District No.3
Buena Vista Township Fire District No.4
Buena Vista Township Fire District No.5