SAN JUAN UNIFIED SCHOOL DISTRICT
PROCUREMENT STANDARD PRACTICES GUIDE

BUSINESS SUPPORT SERVICES
PURCHASING DEPARTMENT
5133 ENGLE ROAD
CARMICHAEL CA 95608
www.sanjuan.edu/purchasing
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Order Process</td>
<td>5</td>
</tr>
<tr>
<td>Delivery / site Receiving Instructions</td>
<td>5/6</td>
</tr>
<tr>
<td>Warehouse Request</td>
<td>7</td>
</tr>
<tr>
<td>Leasing and Renting</td>
<td>7</td>
</tr>
<tr>
<td>Purchasing Bidding Guidelines</td>
<td>14</td>
</tr>
<tr>
<td>Surplus Property</td>
<td>14</td>
</tr>
<tr>
<td>Purchasing Code of Ethics</td>
<td>15</td>
</tr>
</tbody>
</table>
I. PURCHASING PROCEDURES

A. General

1. The Purchasing Department exists to serve the District community in the selection, acquisition and utilization of materials and services in a manner that provides accountability for District expenditures. All purchases of goods and services must be done in an open and competitive environment to ensure that prices paid by the District are ‘fair and reasonable’. As a public institution, the District is committed to an environment that fosters open decision-making, practices and policies. Our business objective is to select vendors and suppliers on the basis of the quality of their respective products and services, in accordance with our stated policy and procedures in order to obtain the best value for the District.

2. It is the responsibility of the Purchasing Department to provide procurement oversight and to ensure that purchases are made in accordance with all applicable local, state and federal laws, regulations, codes and ordinances.

3. Questions regarding existing orders, vendors, availability of items, or other specific procurement problems should be directed to the Purchasing Department.

4. Reports of delays, inattention, or suggestions for improvements of purchasing methods are welcome by the Procurement Department. If problems exist, contact the Purchasing Department (971-5340).

B. Authority and Policy

1. The Purchasing Department has been given the exclusive authority, unless otherwise stated, to:

   a. Initiate, conduct, and/or conclude negotiations concerning the purchase of materials, equipment, supplies, and services for the School District.

   b. Obligate the School District for goods and services.

   (1) Teachers, faculty and staff need to be very careful when responding to phone solicitations. Unscrupulous vendors will say they are sending you a free sample which will be followed by a case of the product and an invoice. They will not accept returns, so a big legal hassle begins. Do not get trapped. Just say “NO THANK YOU!

   (2) The Purchasing Department is not authorized to make personal purchases for faculty or staff members.
(3) Administrator may not sign contracts (including copier leases). Only the following cabinet members are given authority to sign contracts:

General Davie Jr. Acting Superintendent of Schools  
Derek Garcia, Interim Chief Academic Officer  
Kent G. Stephens, Chief Financial Officer  
Kent A. Kern, Assist. Supt., Operations and School Support  
Annette Buckmaster, Assist, Supt, Human Resources  
Beth Davies, Assist. Supt., Secondary Education

II. PROCUREMENT METHODS, APPROVALS AND TAX EXEMPTION

A. Methods:

1. Approved methods for the purchasing of goods and services available to schools and departments include:

   a. Purchase Orders – This is the primary means used to procure goods and services.
   b. Cal-Card (VISA) – This State contracted card is used to purchase goods under $500. A few specialized exceptions are allowed, contact Purchasing for authorization. See CAL-Card Manual.
   c. Sam’s Club Card/Raley’s Card/ Savemart Card. For information regarding these stores please contact Chris Wenzel at 971-7168 or email cwenzel@sanjuan.edu
   d. Direct Pay and Petty Cash are handled by accounting.

2. Detailed procedures governing the procurement of goods and services may be found at: www.sanjuan.edu/purchasing

3. All store credit cards are prohibited except as noted in 1b and 1c above!

B. Approvals: Requisition must have proper authorized signature in order to be processed

C. Tax Exemption: San Juan Unified School District is not tax-exempt
III. PURCHASE ORDER PROCESS

1. Purchase Orders are created by the Purchasing Department based upon Requisitions Submitted by schools or departments. Requisitions form is available on the District Intranet under Forms & Docs. Requisitions numbers shall not to be given to vendors in lieu of purchase orders numbers.

2. The following guidelines are provided to assist in preparing requisitions. Each requisition must include as a minimum the following information:
   
a. A good description or specification for each item to be ordered: Including catalog or manufacturer number, size, color, quantity, model number, or other details.
   
b. Correct budget code, with correct location code. Make sure you have enough money in the account to be used or the processing will be delayed.
   
c. Estimated/exact cost of each item on the requisition; if known include shipping cost.
   
d. If you have numerous purchases from one vendor, a Blanket Purchase Order (BPO) can be submitted. All BPOs expire on June 30 of the school year. The BPO number must be given to the vendor each time an order is placed.
   
e. A signed purchase requisition is required to begin the bid process.

IV. DELIVERY INSTRUCTIONS:

To create efficiencies and expedite delivery of purchases all purchase order items will be delivered directly to the ordering department/site when applicable.

The benefits of shipping items directly to the site/department are faster delivery of items, elimination of duplicate effort in receiving items, and elimination of confusion surrounding backorders.

Exceptions to direct delivery to the ordering department/site will be:

- Shipments requiring a loading dock
- Computers and technology equipment
- Most equipment over $500
- Buyer Cal-Card and Amazon.com orders
V. SITE RECEIVING PROCEDURES:

Sites will observe the following procedures when receiving deliveries directly from the vendor:

1. Verify shipping address.

2. Make sure the freight has been delivered to the correct address. If it is not for your department or site, do not accept it.

3. Note shortages or damages.

4. If it is obvious that part of the order is damaged, note the problem immediately on the freight bill. Make sure you and the delivery person sign all copies of the freight bill indicating the damage. Open all cartons immediately.

5. Inspect contents for concealed damage. Sometimes it is not convenient to inspect a shipment thoroughly while the delivery person is still there. Count all items and verify part numbers and descriptions match the purchase order. Any shortage or damage must be detected before the merchandise is put into service. Note any discrepancies on the delivery point copy of the purchase order.

6. Notify Purchasing if something is wrong with your order. Purchasing will handle damages, shortages, exchanges or returns with the vendor. The exception to this is Staples on-line blanket orders. Returns and exchanges are handled by the site on line using Staples Advantage.

7. Completion of the receiving process Send signed and dated delivery point copy of purchase order to Purchasing as soon as possible (with discrepancies/damages noted). Vendors are paid upon confirmation of receipt.

8. Send signed and dated delivery point copy of purchase order to the Purchasing Dept. as soon as possible. Note any discrepancies or damages.

VI. WAREHOUSE REQUESTS

The District Warehouse carries paper and limited forms needed for everyday school use. Orders may be placed by a Stores requisition located on the District Intranet under Forms & Docs.
VII. LEASING AND RENTING

1. The District has secured contract pricing for various copier models. Contact the Purchasing Department Chris Wenzel at 971-7168 or via email cwenzel@sanjuan.edu for vendor copier information.

2. Outside agencies requesting to use or lease District facilities need to contact the Planning Department at 971-7073.

VIII. PURCHASING BIDDING GUIDELINES

Business and Noninstructional Operations

BIDS AR 3311

I. Purchasing Bidding Guidelines

Where required by statute, staff shall secure bids. Authority to authorize contracts, leases and lease purchase agreements on behalf of the School District is to be conducted by the Superintendent or designee. To ensure that the School District is obtaining materials and services at the most competitive price, state law requires “comparative shopping” before the purchase is made. The guidelines for comparative shopping vary according to the size of the purchase, type of purchase and range from informal price quotes to official advertised requests for sealed bids. These guidelines are described as follows:

1. Informal quotes- Purchases from $7,500 to $15,000 for equipment, services and supplies require written documentation of informal quotations from three separate sources. The employee responsible for the purchase may obtain the quotes, or the purchasing staff will do so prior to actual purchase.

2. Formal quotes- Purchases from $15,000 but not exceeding the amount specified in law, and as annually adjusted by the Superintendent of Public Instruction (Government Code 53060; Public Contract Code 20111) for equipment, services and supplies, require three separate formal written quotations. The employee responsible for the purchase may obtain formal quotes written on a vendor’s letterhead or on a Purchasing Department form and signed by an authorized employee of a vendor. All quotes are to be recorded on paper and attached to the purchase requisition. If requested, the Purchasing Department will perform this task.

3. Formal Advertised bids- All purchases that exceed the amount specified in law, and as annually adjusted by the Superintendent of Public Instruction (Government Code 53060; Public Contract Code 20111) must go through the advertised bid procedure required by the State of California. (Public Contract Code section 20111) The recommended award must
then be approved by the Board of Education. District funds cannot be committed prior to Board approval on purchases of any size. Advertised bids are handled by the Purchasing Department. The bid process may take six to eight weeks.

As of January 1, 2014 the current bid threshold is $84,100.00.

**Formal Bid Process:**

A. The School District must publish a notice calling for bids at least once a week for two weeks in a newspaper of general circulation or a newspaper published within the boundaries of the School District.

B. The notice calling for bids must include the following information:

- A description of the work to be performed and/or materials to be supplied;
- The place where the bids are to be received and opened;
- The deadline for receipt of bids and the time when such bids will be opened;

C. Bid instructions and specifications shall include the following requirements and information:

- All bids for construction work shall be presented under sealed cover and shall be accompanied by one of the following forms of bidder’s security: (Public Contract Code sections 20107, 20111)
  - A cashier’s check.
  - A bidder’s bond executed by an admitted surety insurer and made payable to the School District.
- The security of unsuccessful bidders shall be returned in a reasonable period on time, in no event later than 60 days after the bid is awarded. (Public Contract Code section 20129)
- Under no condition shall bids be accepted after the advertised bid opening time, regardless of whether the bids are actually opened at that time. (Public Contract Code section 20112)
  - When two or more identical bids are received, the Board may determine by lot which bid shall be accepted. (Public Contract Code sections 20117, 22038)
  - Any subsequent change or alteration of a contract shall be governed by the provisions of Public Contract Code section 20118.4.
  - After being opened, all advertised bids shall be made available for review by all interested parties.

D. The project must be awarded to the lowest responsible bidder, but if no bids are received, the project may be performed by the employees of the School District by force account or negotiation contract (Public Contract Code section 22038).

E. After formal bids are received, rather than award the project to the lowest responsible bidder, the School District may:

- Abandon the project or re-advertise for bids; or
- By resolution adopted by 4/5th vote, declare that the project may be performed more economically by the employees of the School District.
4. General Conditions
   The Governing Board shall reserve the right to reject any and all bids and waive any
   irregularities or informalities in any bid or in the bidding.

   The Governing Board shall reserve the right to enter into a continuing contract with an
   accepted vendor for work or services, or for apparatus or equipment, not to exceed five years;
   for materials, or supplies not to exceed three years. (Education Code section 17596)

   All bidders shall be given an equal opportunity to qualify for the School District’s business.

5. Protests by Bidders
   A bidder may protest a bid award if he/she believes that the award was inconsistent with
   Governing Board policy, the bid's specifications, or not in compliance with law.

   A protest must be filed in writing with the Superintendent or designee within five working
   days after receipt of notification of the contract award. The bidder shall submit all documents
   supporting or justifying the protest. A bidder's failure to timely file a protest shall constitute a
   waiver of his/her right to protest the award of the contract.

   The Superintendent or designee shall review the documents submitted with the bidder's
   claims and render a decision in writing within 30 working days. The Superintendent or
   designee also may convene a meeting with the bidder in order to attempt to resolve the
   problem.

   The bidder may appeal the Superintendent or designee's decision to the Governing Board.
   The Superintendent or designee shall provide reasonable notice to the bidder of the time for
   Governing Board consideration of the contract award.

6. Specifications
   Specifications shall be established that are descriptive of materials or equipment desired that
   are sufficiently broad to promote competitive bidding. The specifications shall include a
   general description of the item or items and its functional performance and may refer to a
   brand name, number or equal. The term "or equal" as used in all bidding by the district
   means "or equal" in the evaluation as determined by the purchaser and not by the vendor.

   Bids shall be publicly opened and read at the prescribed time and place as set forth in the
   bidding instructions, and tabulated for study. Bidders shall be given the opportunity to make
   a record of the bids received.

   When proper study has been given to a bid and the findings have been completed, a report
   shall be made to the Governing Board as follows:
   1. The number of companies that have been requested to bid.
2. A list of the companies to whom the Using and Purchasing Departments recommends that the bids be awarded.

II. Exceptions to Formal Bidding Procedures above:

   A. The School District need not comply with formal or informal bidding procedures in cases of emergency (Public Contract Code sections 20113 and 22035).
   B. An emergency exists when any repair, alteration, work or improvement to any existing facility of the public school is necessary to permit the continuation of existing school classes or to avoid danger to life or property, and in either such event, there is no time for competitive bidding (Public Contract Code section 20113).
   C. Procedure for adopting an emergency measure.
      1. With respect to projects under the general competitive bidding laws (Public Contract Code sections 20111 et. seq.), the measure must be adopted by the unanimous vote of the Governing Board and approved by the County Superintendent of Schools. (Public Contract Code section 20113)
      2. With respect to projects under the Uniform Construction Cost Accounting Procedures:
         i. The measure must be adopted by a 4/5th vote of the Governing Board (Public Contract Code section 22050).
         ii. The Governing Board may, by 4/5th vote, appoint a non-elected officer of the School District to order emergency actions, but the Governing Board must review any such emergency action ordered by any such non-elected officer at the Board’s next meeting (Public Contract Code section 22050 (b)).
         iii. The Governing Board must regularly review the emergency action taken by the appropriate authority and terminate the action at the earliest possible date that conditions warrant (Public Contract Code section 22050(c)).

2. Sole Source
   A. Competitive bidding is not required where it fails to produce an advantage and when the advertisement for competitive bids is undesirable, impractical, or impossible. Any purchase of materials or services that are available from only one source, require written documentation confirming that there is only one source. This written documentation would take the place of the required formal quote/bid and will be obtained and approved by the Purchasing Department.
   B. The Governing Board of the School District may contract with an acceptable party who is one of the three lowest responsible bidders for the procurement or maintenance, or both, of electronic data-processing systems and supporting software in any manner the Board deems appropriate (Public Contract Code section 20118.1).

Due to the highly specialized and unique nature of technology, telecommunications, related equipment, software, and services, because products and materials of that
nature are undergoing rapid technological changes, and in order to allow for the introduction of new technological changes into the operations of the School District, it is in the public’s best interest to allow the School District to consider, in addition to price, other factors as noted in Public Contract Code section 20118.2.

3. Contracts for professional services depending upon a peculiar skill or ability
   A. The School District may generally contract for any special services and advice without competitive bidding if the professionals are specially trained or experienced and competent and the service is not fungible (Government Code section 53060).
   B. The School District may contract for special services, depending on “the nature of the services, necessary qualifications required of a person furnishing the services, and the availability of the service from public sources.” (AFL-CIO v. Board of Trustees (1996), 47 Cal. App. 4th 1661, 1673).
   C. The School District should negotiate a contract with the best-qualified firm offering professional services (Government Code section 4528).
   D. The School District should demand bidding when it is determined that the services needed involve little professional judgment and that requiring bids would be in the public interest (Government Code section 4529).
   E. A state or local agency may not contract with a private firm for construction project management services if all or part of such services are to be performed other than under the direct control of a licensed architect, registered engineer, or private contractor.

4. Contracts for transportation services
   A. The School District does not have to secure bids on a transportation contract if:
      1. The contract is for less than $10,000, or
      2. The contract is made with a person or corporation who/that is a:
         - common carrier, may include student transportation buses; or
         - municipally owned transit system; or
         - parent; or
         - guardian of pupils to be transported (Education Code section 39802).

5. Purchasing programs
   A. Federal: The School District may purchase surplus property from the federal government or any of its agencies in any amount needed for the operation of its schools without taking estimates or advertising for bids (Education Code section 17602).
   B. Public Corporation Agency: Upon a case-by-case determination that it is in the best interests of the School District and to the extent permitted by law, the Board may authorize the purchase, lease or contract for equipment and supplies through a public corporation or agency without advertising for bids (Public Contract Code section 20118).
6. Purchase of supplementary materials
The School District may purchase supplementary textbooks, library books, educational films, audiovisual materials, test materials, workbooks, instructional computer software, or periodicals in any amount without taking estimates or advertising for bids (Public Contract Code section 20118.3).

7. Change orders
The School District does not have to secure bids if the cost of changing a contract does not exceed the greatest of:
   A. $15,000 if work is to be done by a private contractor;
   B. $7,500 if work is to be done by day labor or force account;
   C. $84,100 if supplies are to be furnished, sold, or leased; and
   D. 10% of the original contract price (Public Contract Code section 20118.4), (Individual Change Order).

8. Perishable Commodities
Perishable commodities such as foodstuffs can be purchased through bid or on the open market, depending on School District preference. (Education Code section 38083) In its purchases, the School District shall give preference to products grown, manufactured or produced in California and to foods grown or processed in the United States (Government Code section 4331, Public Contract Code section 3410).

9. Day Labor
Bids shall also not be required for day labor under circumstances specified in law. Day labor shall include the use of maintenance personnel employed on a permanent or temporary basis. (Public Contract Code section 20114)

Whenever the total number of hours on the job does not exceed 350 hours, day labor may be used to erect new buildings. Whenever the total number of hours on the job does not exceed 750 hours or when the cost of material does not exceed $21,000, day labor may be used for the following purposes: (Public Contract Code section 20114)

- School building repairs, alterations, additions
- Painting, repainting or decorating of school buildings
- Repair or building of apparatus or equipment
- Improvements on school grounds
- Maintenance work as defined above

10. Construction and Capital Improvement Projects
The School District utilizes Uniform Public Contract Cost Accounting (Board resolution number 1984, May 28th, 1996) for its construction and capital improvements projects. All
construction and capital improvement projects are coordinated through the Facilities Department.

Capital Improvement Projects are defined as “any public project with a value over $200 that improves or increases the value of any site.” Capital Improvement Projects include all new projects, additions, or site/department modifications over $200.

“Public project” means any of the following:
1. Construction, reconstruction, erection, alteration, renovation, improvement, demolition, and repair work involving any publicly owned, leased, or operated facility.
2. Painting or repainting of any publicly owned, leased, or operated facility.

Uniform Public Contract Cost Accounting procedures are as follows:

A. Public Projects $45,000 or less. Authorizes a School District to contract for “Public Projects” for $45,000 or less with its employees without any Public Bidding Requirements (Public Contract Code section 22032(a)).

The School District requires written quotes on projects under $45,000
- $0-$20,000: 1 Quote
- $20,001-$45,000: 2 Quotes

B. Maintenance Work
Authorizes the School District to contract for “maintenance work” in accordance with informal bidding procedures (Public Contract Code section 22003). Repairs, including maintenance that is not a public project: Maintenance work means routine, recurring and usual work for preserving, protecting and keeping a district facility operating in a safe, efficient and continually usable condition for the intended purpose for which it was designed, improved, constructed, altered or repaired. Maintenance includes, but is not limited to, carpentry, electrical, plumbing, glazing and other craftwork designed to preserve the facility as well as repairs, cleaning and other operations on machinery and other permanently attached equipment. This definition does not include, among other types of work, janitorial or custodial services and protection provided by security forces, nor does it include painting, repainting or decorating other than touchup. (Public Contract Code section 20115)

C. Public Projects $175,000 or less
Authorizes the School District to contract for “Public Projects” for $175,000 or less in accordance with informal bidding procedures (Public Contract Code section 22032(b)).

1. The School District shall maintain a list of qualified contractors to perform different types of work, and the California Uniform Construction Cost Accounting Commission shall maintain a list of construction trade journals, by
county, in which School District may advertise for bids (Public Contract Code section 22034).

2. All contractors on the list for the category of work being bid or all construction trade journals specified in Public Contract Code section 22036, or both all contractors on the list for the category of work being bid and all construction trade journals specified in Public Contract Code section 22036, shall be mailed a notice inviting informal bids unless the product or service is proprietary.

3. The contents of the notices must include: (i) a description of the project in general terms, (ii) information on how to obtain more detailed information about the project, (iii) the time and place for the submission of bids, (not required).

4. All notices must be delivered not less than 10 calendar days prior to the bid opening.

5. The School District may delegate the power to award contracts under this procedure to any appropriate employee of the School District (e.g., the award need not be made by formal resolution). (Public Contract section 22034(e))

D. Public Projects in excess of $175,000
   “Public Projects” in excess of $175,000 must be let in accordance with formal bidding procedures (noted above).

E. Prequalification Procedure For Construction Projects in Excess of $5,000,000. (Board Resolution number 2308, May 11, 2004)
   For any contract for which bids are legally required, the Governing Board shall require that each prospective bidder complete and submit a standardized questionnaire and financial statement. For this purpose, the Superintendent or designee shall supply a form, which requires a complete statement of the bidder's financial ability and experience in performing public works. Prospective bidders shall submit the questionnaire and financial statement at least five days before the date fixed for public opening of sealed bids. The information shall be verified under oath in the manner in which civil law pleadings are verified. The questionnaires and financial statements shall not be public records and shall not be open to public inspection. (Public Contract Code section 20111.5)

   The Superintendent or designee shall establish a uniform system for rating bidders based on completed questionnaires and financial statements in order to determine the size of contracts on which each bidder is qualified to bid. Bidders must be deemed prequalified by the School District at least one day before the fixed bid-opening date. (Public Contract Code section 20111.5)
For further information see the followings useful links:

METHODS TO PURCHASE
SAN JUAN UNIFIED SCHOOL DISTRICT CONSTRUCTION MANUAL
RFP MANUAL
SURPLUS PROPERTY DISPOSITION
PURCHASING CODE OF ETHICS

The San Juan Unified School District subscribes to the following Code of Ethics for the procurement of goods and services, developed by the California Association of School Business Officials (CASBO).

1. **To regard** public service as a sacred trust of the community by whom we are employed.

2. **To demand** truth and honesty in the purchase of goods and services.

3. **To avoid** conflicts of interest or the abuse of our trust as representatives of the District.

4. **To purchase** without prejudice or unfair practices.

5. **To purchase** the proper product of for the purpose required, when and where it is needed.

6. **To purchase** goods and services at the most competitive price possible with maximum benefit to the District.

7. **To provide** all qualified vendors with an equal opportunity for purchases by the District.

8. **To treat** vendors with the same fairness, dignity and respect that the District wishes to receive.

9. **To respect** the District’s obligations and to require that the vendor respect their obligation(s) to the District.

10. **To constantly** improve the quality of products that are purchased and the District’s purchasing methods.

11. **To counsel** and assist fellow purchasing officers in the performance of their duties.

12. **To enhance** development of the purchasing profession.