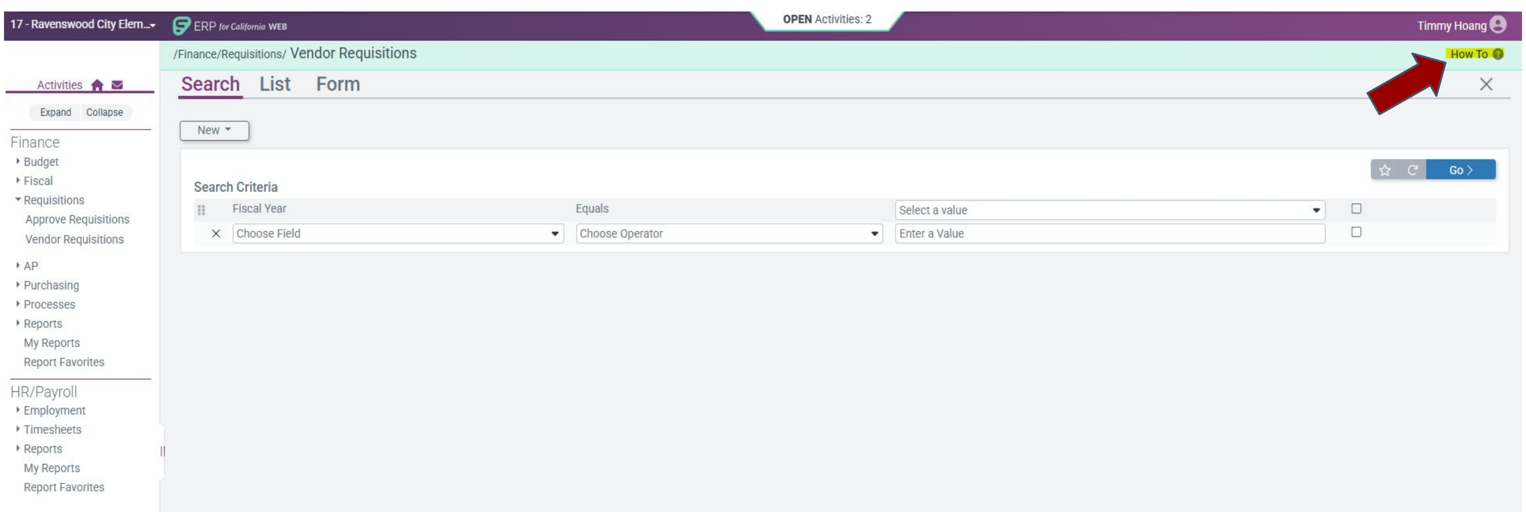
Business Services Manual

SY 2025-26

Overview
Purpose of this guide

- **This document is intended to be a dynamic guide through purchasing. Slides will feature a set of hyperlinked questions to guide you through purchasing. Gray boxes with blue texts are hyperlinks (see example below)**
  - To click on a hyperlink you'll often need to click twice, once to bring up the link and then once to go to the specific slide
- **The next slide after the glossary will also provide you with a table of contents to help you navigate**
- **Don't forget that Frontline also has a "How To" to guide you through the processes (Simply go to the tab, click "How To" and bring up a guide to that specific form)**



Overview
Purchasing glossary

Word	Definition
Fiscal year	The year, starting July 1 and ending June 30 of the next year
Requisition	The first step in the purchasing process -- this is you requesting the business office to create a purchase order
Purchase order	Form created when you have finish your requisition request in Frontline and it has been approved by the budget owner and submitted to Margaret Thompson to generate PO
Invoice	Amount to be paid to the vendor for services rendered or items delivered
Account code	String of numbers, separated by "-" to classify expenditures, looks like "01-0000-0-1110-1000-4316-003-101". Each set of numbers between the dash has a specific meaning (which you can see here)
Budget owner	The department or site head who develops their budget with assistance from the Business Services team, and who has the power to move funds around within the site/department's allocated amounts
Object code (*part of account code*)	The 6th set of numbers in the account code, refers to what type of item or service you are purchasing (i.e., Materials & Supplies, Contracted Services, etc.)
Resource code (*part of account code*)	The 2nd set of numbers in the account code, refers to where the expenditure will come from (i.e., General Fund, REF, etc.)

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Overview
Below is the process of purchasing items and services

1 Contract + Quote → 2 Purchase Order → 3 Goods Arrive with an Invoice → 4 Invoice Processed → 5 Check

To purchase an item / service / etc (You must have a budget set-up in [your budget])

1. **Request a quote** from the vendor for the items that you're purchasing - this can be done by searching for an item online or contacting the vendor directly for a quote

1. **You create a [requisition in Frontline]** which then **has to be approved by the budget owner in Frontline. Frontline does not yet send an automated email - you should let someone know if you're waiting for their approval)**
   a. This information is used for Margaret to generate the **Purchase Order**, the business office then sends the purchase order to the vendor, cc'ing you

1. The vendor then sends the items directly to your school site (make sure to identify a shipping location with the vendor). They will then send an **invoice** to you, which you will have to [upload into this Informed K12 form] **to get the vendor paid**, pairing it with the purchase order PO you created earlier. **It is your responsibility to make sure invoices are paid in a timely order**
   b. If you have an invoice without a **Purchase Order** *(you skipped step 2!)* then *you are in violation of procurement law*. You must reach out to Will Eger and Margaret Thompson.
   c. You may have set up an [Open P.O.] - in which case you can skip straight to this step

1. These two documents are then sent to your **department head via Informed K12**, where they are signed and approved. Note that as of right now, you do not receive any notifications that you have forms to sign and approve in Informed K12

1. Accounts payable then sends out the **check** to the vendor

You can see more detailed step-by-step instructions [here]

Overview

What is in an account code?

A budget string is a set of numbers that Frontline uses in order to categorize revenues and expenses. A budget string consists of the following elements:

- **Fund (2 digits)** - these codes separate out the different types of funds that the district has
  - For example, we have Fund 13, which covers Child Nutrition, Fund 21 which is for construction projects, etc.
  - If you're reading this, you'll only have to use Fund 01, which is for all of our district/school revenues and costs
- **Resource (4 digits)** - these codes denote which grant the funds are coming from
  - Some common ones are 9015 (REF), 0000 (General Fund), 3010 (Title I)
- **Year (1 digit)** - describes the year that you are purchasing something in
  - It is always 0, which means the expense is happening in this fiscal year
- **Goal (4 digits)** - these codes separate out expenses by services
  - Typically, we use 1110 for Regular Education for anything GenEd student-related, 0000 for any administrative costs, and other codes for Special Education/Out of District services
- **Function (4 digits)** - exists as one level further of detail from the Goal code, typically we use 1000 for Regular Education for anything GenEd student-related, 7200 for any administrative costs, and other codes for Special Education/Out of District services
- **Object (4 digits)** - describes exactly what the purchase / revenue item is
  - The codes are organized in the following fashion:
    - <3000 - certificated and classified salaries & hourly time
    - 3000+ and <4000 - benefits
    - 4000+ and <6000 - materials, maintenance of equipment, licenses, etc. (this is mainly what you will use)
    - 8000+ - used to classify revenues
- **School (3 digits)** - identifies the site/department location where the expense is occurring
  - Important to know that you will likely only have access to codes with the school code of the location you are in
- **Management (3-4 digits)** - these are codes that have been made up by RCSD for further classification
  - We tend to use these when we need keep track of subgroups of a specific resource. For example, Resource 9010 is for local funds (e.g., donations), but there are smaller funds that exist in there - we use management codes to separate those out

Example:

01	3010	0	1110	1000	4316	001	303
Fund (Gen. Funds)	Resource (Title I)	Year (This year)	Goal (Gen Ed)	Function (For Instruction)	Object (Inst. Materials)	School (Belle Haven)	Management (Title I code)

Purchasing Guidelines

Is what you are looking to purchase in your budget?

Please select one of the options below:

[Yes, and I have a specific budget string I am looking to purchase from]

[No, I need to create a budget string because I am looking to purchase something that's not currently in the budget]

[I'm not sure if I have a budget string - how can I check?]

Purchasing Guidelines
Creating a new budget string

- Step 1: First, please make sure that what you are looking to purchase does not fall into one of the categories/activities listed in the budget sheet (link here)

- Step 2: Please email Jesse Ladomirak (jladomirak@ravenswoodschool.org) with the following information
  - What grant this purchase is on (General Fund, REF, new grant, etc.)
    - If this is a new grant, please also let her know how much this grant is for, and the time horizon you have to spend it over
  - The school site / central office department you belong to
  - What the purchase is for
  - What vendor you will be purchasing from

- Step 3: Wait until they respond with a code and then click the link at the bottom of the sheet

Now that you have your budget string, click here to go to the next section

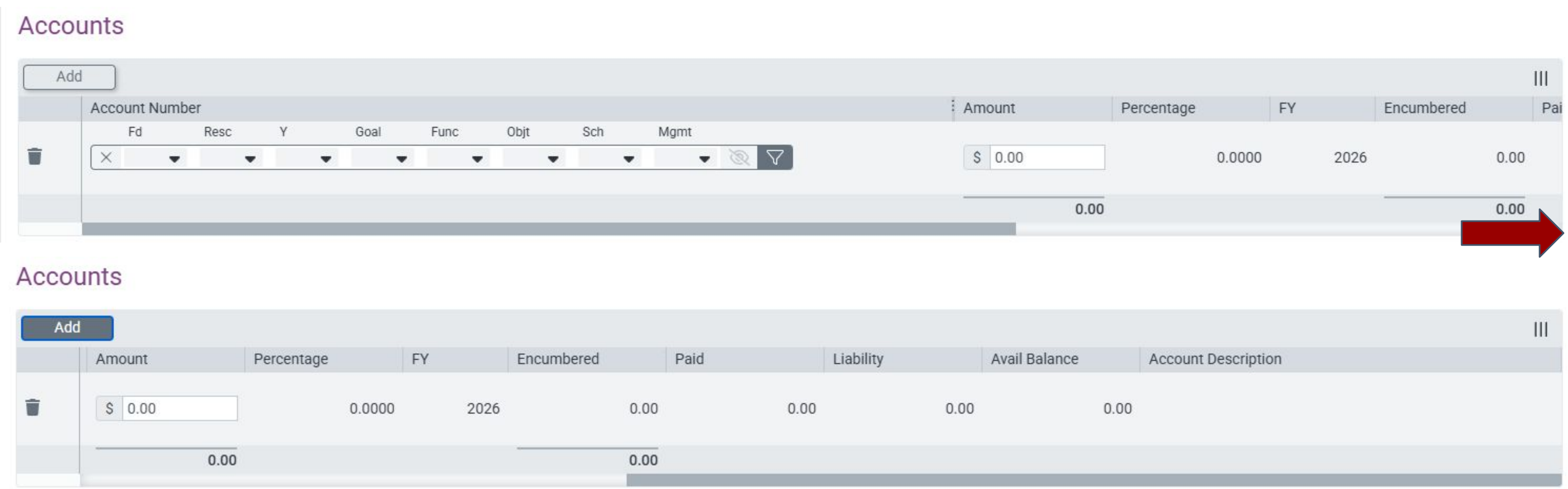
Purchasing Guidelines

Here is how to check what is in your budget / find existing budget strings

[***Check on the district's budget google sheet***]

Double Checking in Frontline

When entering an account number while creating a Vendor Requisition, you can scroll to view the remaining available balance for that account (see figure below). This is a helpful way to confirm that sufficient funds are available before submitting the requisition.



(if you do not know your school number, refer below or contact Jesse in the Business Office ([jladomirak@ravenswoodschools.org]))

[***Now that you have your budget string, click here to go to the next section***]

Purchasing Guidelines
How much are you looking to spend?

Amount*	Approach and Notes
Less than $10,000	• Amounts less than $10,000 do not need to be sent out to multiple possible vendors (i.e. bid) -- although we encourage you to shop around to make sure you are spending the funds wisely and still look at multiple quotes online. • If this agreement has a contract, it needs to go before the board. But these amounts do not need to be board approved.

$10,000 to $114,500	• Amounts in this range should be informally bid. That means that you need to:
	  ○ Draft a scope of work - this does not need to be long or overly detailed, a few paragraphs could be fine as long as it is detailed enough for a reader to understand and submit a similar proposal and understand how you will evaluate proposals.
	  ○ Send this out to multiple vendors, with the goal of soliciting at least three written proposals for the work.
	  ○ In general, you should take the lowest bidder. However, you can incorporate other criteria in the process and select someone other than the lowest bid.
	• These contracts need go before the board

More than $114,500	• Amounts above this are required to go out to competitive bid (link here) - although there are some exceptions for consulting costs (including coaches), curriculum, and technology ○ That does not mean you shouldn't informally collect multiple bids • These amounts are different for construction purchasing (those go through CUPCCAA guidelines) • These contracts need to go before the board (usually on the consent agenda)

*Note 1: These are total costs for the project, not necessarily for the vendor. For example, we spend more than $15k on Amazon each year, but for very different projects. However, if we wanted to buy $100k worth of pencils, we couldn't split this into 10 separate projects each of which is below the threshold.
Note 2: These amounts are set by the state (link here). These numbers change over time - this reflects the 2025 numbers.
Note 3: Consider and make note of PCC 20118.3 for proposed purchases of supplementary instructional materials.

Purchasing Guidelines
Where are you looking to purchase this from?

Easier and quicker

More difficult, and time intensive

Established purchasing partner (Amazon, Office Depot, Home Depot)

- With a few larger vendors we have specific systems set up with those partners to make purchasing easier
- Typically, Administrative Assistants have access to these easier routes of purchasing
- You still need to generate a purchase order in Frontline but you do not need to submit an invoice through InformedK12

Existing or Often-used Vendor

- This includes vendors not listed above that we have purchased things in the past (e.g. “Really Good Stuff”, Heinemann, etc.) or partners (e.g. BGCP)
- Even if you use the vendor often, you will still have to go through these steps - there are no other shortcuts

New Vendor

- These are vendors that the district has not purchased from in the past
- If you need to add a vendor into the system, please email Margaret Thompson with the following: (mthompson@ravenswoodschools.org)
    - Vendor name, contact person, address, telephone number, fax number, and a W-9 from the vendor

Purchasing Guidelines: Established Purchasing Partner

Which of the partners below are you looking to purchase from?

Amazon

- Administrative Assistants have access to place Amazon orders. If you have access to this, you can place orders through online shopping process linked.
- Margaret will check the purchase before allowing it to go through

Office Depot

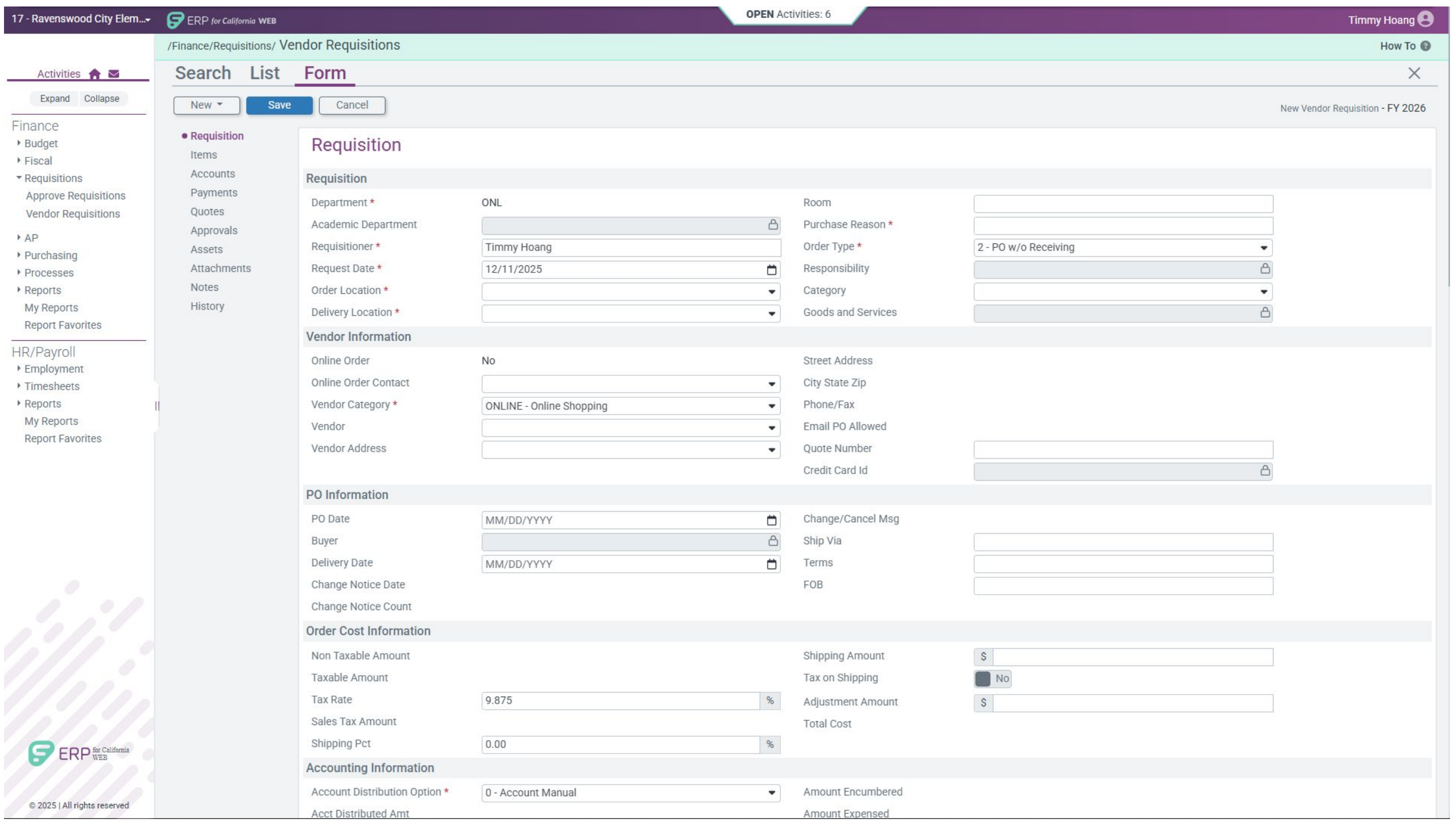
- Administrative Assistants are setup with an account where you can order directly through Office Depot.
- All orders will be checked by Margaret before actually going through
- You must submit a requisition with a copy of your order

Home Depot

- The district has a credit line set up with Home Depot in order to expedite the process of purchasing materials. All purchases from Home Depot must be approved first by Delma Maciel (dmaciel@ravenswoodschools.org)

Purchasing Guidelines: Existing Vendor
Creating a requisition (page 1/3)

- **Step 1**: Navigate to [Frontline ERP](), log in, and on the left side you will see a menu.
- **Step 2**: Under the Finance section on the left hand side, Requisitions -> Vendor Requisitions
- **Step 3**: There will be three tabs, go to "Forms" Tab -> New (You'll see a form that looks like this:)



Purchasing Guidelines: Existing Vendor
Creating a requisition (page 2/3)

- **Step 4**: Fill out the form, including the fields:
  - “Requisition” section enter
    - Order Location
    - Delivery Location
    - Purchase Reason: (write a short description of what this purchase is - please do not write “see quote”)
    - Order Type

- **Step 5**: Under the fields that you just filled out are a couple of categories, namely Vendor Information, Order Cost Information, Items, Accounts, and Attachments. Keep these in mind for the next steps.
  - First, in the “Vendor Information” section (Figure 1)
  - Select the “Online Order Contact” with dropdown and select contact person
  - Next, fill in the “Vendor” by searching for the vendor. When typing in the box it will provide a menu (Figure 2)
  - Select the correct vendor from the dropdown menu
  - If your vendor does not exist, please email Margaret Thompson, and she will help you set it up
  - Then enter “Quote Number” of the quote received from vendor

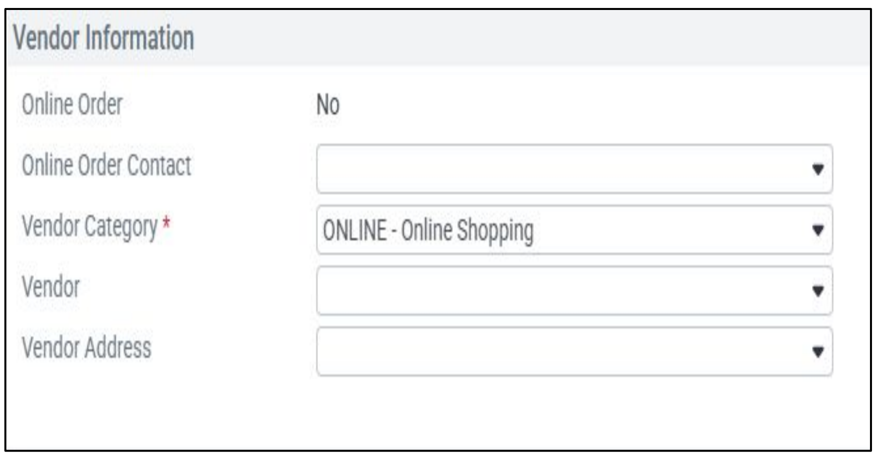


Figure 1

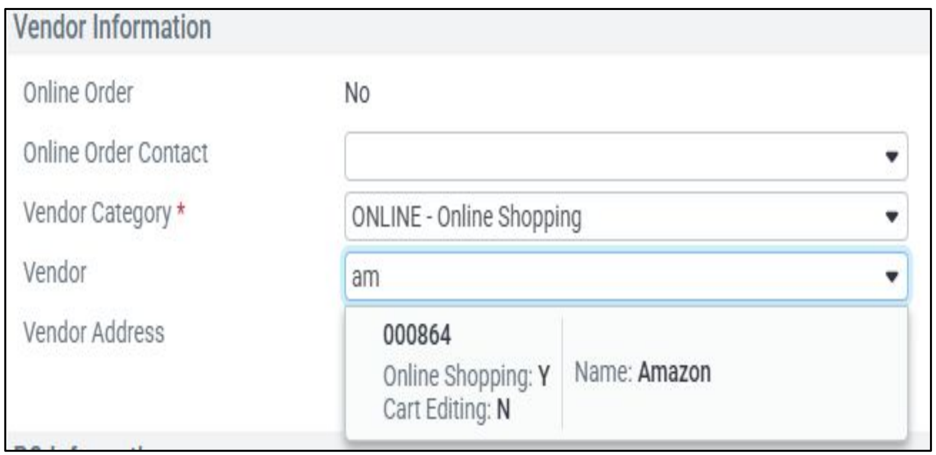


Figure 2

Purchasing Guidelines: Existing Vendor
Creating a requisition (page 3/3)

- **Step 6**: You should now have a vendor filled out in the "Vendor Information" section. Please now scroll down to the "Items" section and click on the "Add" button. Your screen should look like Figure 3. Please fill the following fields:
  - Line Item #: Item number on the invoice that you have received from the vendor
  - Order Quantity: Number of items (1 if you are purchasing only 1 thing)
  - Order Unit:
  - Description: A detailed description of what you are purchasing (again, "see quote" or "see attachment" will not be satisfactory as a description - something like "BGCP - antigen testing for summer school paid for by COVID funds")
  - Unit Price: The total price per unit (total price, if you put 1 in Quantity)
  -
- **Step 7:** Scrolling back up to **"**Order cost Information" enter Sales Tax and Shipping Amount from vendor quote

- **Step 8**: Right below, you will now in the "Accounts" section by clicking on the "Add" button. You will be using this to assign the cost to a budget code. (Figure 4)
  - Add in the account code into the relevant fields *(if you do not have a valid code, the system will not process your request)* - you can find your codes again [here]
  - Attach your expenses to each account code, as needed

- **Step 9**: Under the "Attachment" subtab, please attach any proposals or quotes that you have that are relevant to the purchase

- **Step 10**: Double check all fields for any errors and click or "Save" in the top left corner of the window. Then you will go to "Tasks" in the top left corner and click "Submit" for approval

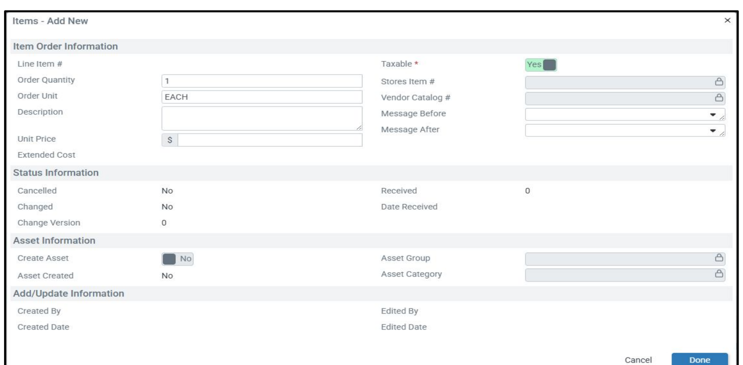


Figure 3

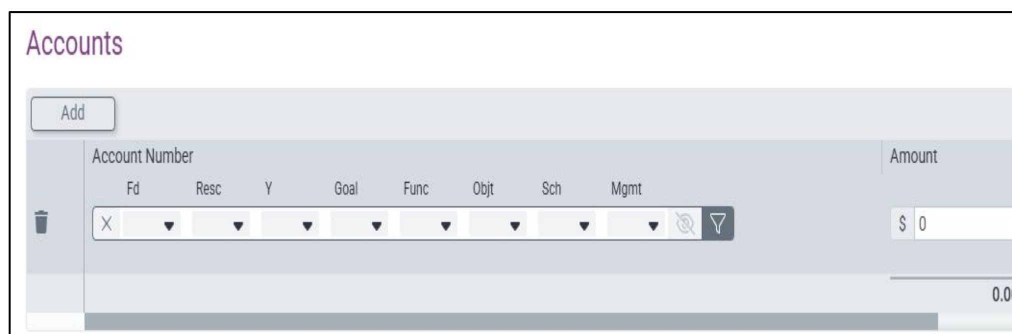
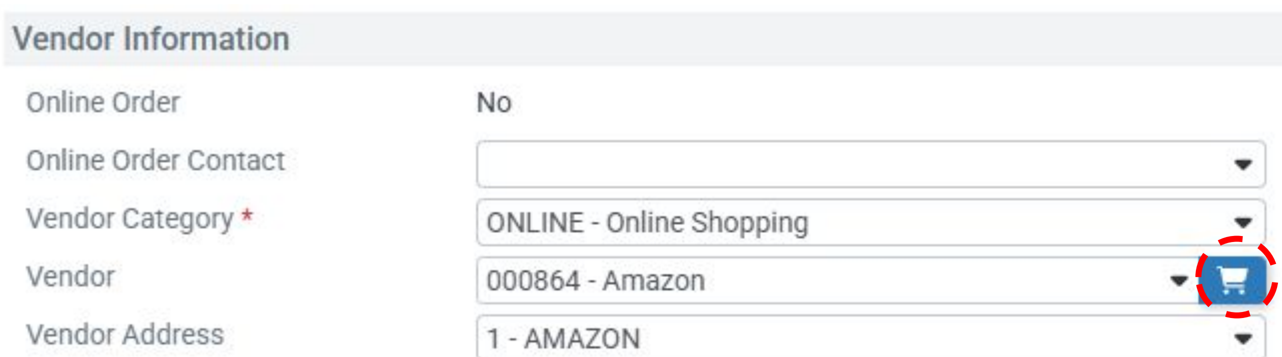


Figure 4

Purchasing Guidelines: Existing Vendor

Creating an online shopping requisition - Amazon (page 1/2)

- **Step 1**: Navigate to [Frontline ERP](), log in, and on the left side you will see a menu.
- **Step 2**: Under the Finance section on the left hand side, Requisitions -> Vendor Requisitions
- **Step 3**: There will be three tabs, go to “Forms” Tab -> New
- **Step 4**: “Requisition” section enter
  - Order Location
  - Delivery Location
  - Purchase Reason: (write a short description of what this purchase is - please do not write “see quote”)
  - Order Type
- **Step 5**: “Vendor Information” section
  - Select “Amazon”
  - Click the shopping cart icon (circled below)
  - A browser window will open, taking you to the Amazon website



Purchasing Guidelines: Existing Vendor

Creating an online shopping requisition - Amazon (page 2/2)

- **Step 6**: Shop Online
  - Add items to your cart as you normally would
  - When finished, click “Check Out”

- **Step 7**: Verify Items in Requisition
  - Return to Frontline
  - Check the “Items” section to confirm that your cart contents have been added automatically

- **Step 8:** Scrolling back up to **“**Order cost Information” enter Sales Tax and Shipping Amount from vendor quote

- **Step 9**: Right below, you will now in the “Accounts” section by clicking on the “Add” button. You will be using this to assign the cost to a budget code. (Figure 4)
  - Add in the account code into the relevant fields *(if you do not have a valid code, the system will not process your request)* - you can find your codes again here
  - Attach your expenses to each account code, as needed

- **Step 10**: Double check all fields for any errors and click or “Save” in the top left corner of the window. Then you will go to “Tasks” in the top left corner and click “Submit” for approval

Purchasing Guidelines: Open Purchase Order

Sometimes we may set up an ‘open PO’ allowing us to charge multiple invoices against one purchase order

- In some cases a **contract will require us to pay a vendor a set amount, but to pay this over a set period of time** (e.g. once a month for ten months):
    - This is usually for contractors - for example, we are paying BGCP to run our after school programming. This amount is fixed annually, but paid in 10 monthly installments.
    - This is not the same as a vendor that we will be paying multiple times for different services (e.g. if we are buying math and ELA curriculum from one vendor). For that, we would need to submit a different requisition for each unique purchase.

- In this case, **you only need to submit one requisition a year**, for the total amount. You can then submit, via InformedK12, invoices for each payment which will then be charged against that purchase order

- If you think this might apply to you, but aren’t sure, reach out to Margaret

Purchasing Guidelines: What can I buy?

There are some things that you need to exercise caution around when purchasing / spending money

Item	Worry	Resolution
Student incentives (e.g. gift cards)	• You need to be very cautious any time you use government dollars (i.e. money through the district) to purchase incentives for students, staff, or families • Large gifts can be considered taxable income or a misuse of public funds	• You can see more detailed information here, including spending limits • These purchases can go through REF
Food	• Food is not ever allowable on federal funds (e.g. Title I Part A) • Food cannot be purchased for picnics, employee recognition events, holiday parties, or other gatherings	• In some instances, food can be purchased through non-federal funding sources if it is for an approved working event (e.g. lunch for a ILT meeting or dinner for board members). • In general, it is best to put these purchases through REF

FCMAT has more detailed (but readable) guidelines here & here

Purchasing Guidelines: What can I buy?

There are some things that you need to exercise caution around when purchasing / spending money

Item	Worry	Resolution
Swag (e.g. school sweatshirts)	• Any time you collect cash from students or families in an official capacity, you need to comply with all cash management rules	• If you want to buy sweatshirts and then have staff and families reimburse you, either do this on your own (i.e. your credit card) or go through REF
Gifts and Alcohol	• You cannot use public funds to purchase a gift (even a retirement gift or a recognition) for employees, students, or volunteers. • Alcohol can never be purchased with district funds.	• You can still purchase awards for excellence for students and staff. • You can pay for flowers for schoolwide events • These purchases can go through REF

FCMAT has more detailed (but readable) guidelines here & here

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Grant Management

Generally speaking, the grant manager - you! - is responsible for managing nearly all aspects of the grant

Grant Type	Description	Your Responsibility	Business Office Support	Point of Contact
Federal Funds	• Federal grants that the district is entitled to based on enrollment -- but that often have stringent reporting requirements	• Develop a sufficiently detailed spending plan (i.e. budget) • Ensure that you are in compliance with the spending requirements (e.g. understand the requirements of the grant, and ensure that your budget meets those requirements) • Spend accurately against account codes • Submit any additional required documentation (e.g. SPSAs, grant paperwork) • If your competitive grant application includes staff salary/benefits funding, ensure that it is approved in writing, by the Business Office and HR, before you apply	• Set up account codes, and put your proposed amount in • Report expenditure against those lines to the grant manager	Jesse Ladomirak
State Funds	• Grants from the state (e.g. ASES			Varies by grant
Ravenswood Education Foundation	• Expenses on REF's budget			Jenna Wachtel Pronovost
Other Competitive Grants	• Grants that you applied for from an outside foundation (e.g., MSFA, Silicon Valley Foundation, etc.), and county grants (e.g. TUPE)			Varies by grant, but generally you manage these!

Grant Management

If your purchase falls under one of the following grants:

Federal Funds (Title I, Title II, Title III, IDEA, etc.)

- Check with Jesse Ladomirak (jladomirak@ravenswoodschools.org) to make sure all requirements are met
  - For Title I, II, III, IV spending, reach out to Jesse
  - For any SPED funds (i.e., IDEA), reach out to Stacey
- You can also find more detail here

REF

- Make sure that your budget code has resource code 9015 and a management code that begins with R (e.g., R30)
- Refer to the master budget file if you need any help
- If you need to make any changes or would like to reallocate your funds, please email Jenna Wachtel Pronovost (jenna@ravenswoodef.org) and Will Eger (weger@ravenswoodschools.org)

Grant Management
If your purchase is made using federal funds

Documenting Expenditures
- You **must** include the following within the "description" field (step 4) of the Frontline requisition:
  - **SPSA Goal and Action Number**
  - Vendor Name
  - Keywords about the expense *(recording additional details about what you're buying ensures you can remember what you purchased when asked by an auditor a year later).*
- Use the correct Resource Code *(see right)* and Management codes *(TBD)* to track the specific purchase categories

Key things to remember for non-personnel expenditures:
- Where possible, don't use Amazon or the Credit Card since this is harder to document
- Must not **supplant** funds for purchases that have been or would have been provided with other state or local funds
- Cannot use these funds to provide services, materials, or activities required under federal, state, or local laws
- All federally funded expenses need to be identified your SPSA, which must be board approved

Any questions?
- Check with Jesse Ladomirak (jladomirak@ravenswoodschools.org) to make sure all requirements are met
- Individuals on these funds need to document their time and effort throughout the year

Federal Funds (Title Grants)	
Title I, Part A **Resource Code: 3010**	**Title II, Part A** **Resource Code: 4035**
Title III, English Learner **Resource Code: 4203**	**Title III, Immigrant** **Resource Code: 4201**
Title IV, Part A **Resource Code: 4127**	**CSI** (Comprehensive Support and Improvement) **Resource Code: 3182**

Grant Management

If your purchase falls under one of the following grants:

A Competitive Source (e.g. a grant you applied for)

- If you have funds through an outside grant (e.g., MSFA, Silicon Valley Foundation, ASES etc.), it is **your responsibility** to do the following:
  - Apply for the grant (with permission from a director)
  - Create a line item budget for the program with proposed spending
  - Draft a contract (if necessary) with the funder
  - Meet all reporting requirements for the grant, including ensuring that proposed spending uses fall within eligible uses of that grant

- It is the business office's responsibility to:
  - Upload the proposed budget to Frontline
  - Ensure that you have access to spending on those lines
  - Helping you pull reports for those specific lines (e.g. that management code)

- *Grants that will partially or fully fund any personnel (salaries/benefits) must be approved in writing by Business Office and HR, prior to you applying for the grant.*

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Budget Management
Helpful tips

In order to properly manage your budget, it's helpful to do the following:

- As best as you can, use budget strings that have been created in the master budget file
    - Check the master budget monthly (currently the Business Office updates current year expenditures to the master budget on a monthly basis)
    - Make sure to submit requisitions on time, so that purchase orders can be properly generated
    - When purchase orders are not properly created, it becomes difficult for us to track expenditures

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Contracts
Most agreements for purchased services need a contract

- If you are purchasing a service (e.g. consulting, general contracting, or recurring service like substitute teachers, an after school program, special education teachers, etc.) **you need to have a contract with that vendor**.
- If you are purchasing a good - not a service - like classroom supplies, passes to the Zoo, things from Amazon, etc. you generally do not need a contract
- If you are purchasing a license for a technology product (i.e., Infinite Campus, Freckle Math), you may need a contract, depending on how much it costs and the length of time of the contract. You can contact Margaret Thompson (mthompson@ravenswoodschools.org) if you're unsure

See the next slide for a helpful decision tree on whether a contract is needed!

Contracts

When do I need a contract?

What are you purchasing?

- A physical thing I can hold in my hand (e.g., pencils) → You generally do not need a contract; this can go through a normal purchase order process (there are some exceptions for large purchases)
- A digital / online tool (e.g., Zoom, Seesaw) → You may need a contract depending on how much it costs and the length of time. Check with your department head
- Time / expertise from someone not employed by RCSD (e.g., Playworks, Stepping Stones Group etc.)
  - Individual: Is the Independent Contractor doing a job that we also have internally?
    - Yes (e.g., OT) → This will likely be a challenge (contact Joan and Jesse)
    - No (e.g., specialized PD) → You will need an Independent Contractor Agreement
  - Agency: Hiring an agency / Company (e.g., New Teacher Center) → The Agency will likely have a template contract they will send you

Contracts
Each contract the district signs needs to include the following information

- Begin with some **language describing why you are partnering together** (e.g. “The Parties are coming together to provide a quality after school program at all schools”)
- **What are the district’s responsibilities? What are the vendor’s responsibilities?**
  - This should be written in plain and simple language and should detail out what each party is responsible for providing
  - Be careful about over-committing to things that the district is not able to do or doesn’t want to do (e.g. will the Chief Business Officer actually “meet with partner staff on a weekly basis”?)
- **What is the length of the contract?**
  - Generally, we do not enter into contracts longer than five years.
  - You are allowed to include renewal language, as long as it is a mutual option to renew (i.e. the district doesn’t have to renew)
  - You need to include language around terminating the contract (i.e. either party can cancel the contract at any time)
- **What are the costs associated with the contract?**
  - What are the costs for the contract? How often do we expect to pay them? Are we paying for this on a per-pupil basis or something else?
  - If this is a multi-year contract, will these costs increase over time? If so, how will that rate be determined?
- If the agreement **includes confidential student information**, you may need to include a data sharing agreement. See our template here.

The vendor may also have a standard contract - if they do, you are welcome to use that as long as it includes the components above

Contracts
The process of getting your contract approved

Here is the process for getting your contract approved:

- You (budget owner) reviews the contract for the information on the previous slide
- You (budget owner) will confer with the vendor to identify any possible issues with the language provided
- You send to Will Eger (weger@ravenswoodschools.org) for review
  - If the contract is unusually complicated, we will send it over to our legal team (County Counsel) for final review
- The Business Office will approve the contract assuming that you have sufficient funds in your budget and include: 1) clearly defined responsibilities for RCSD and the organization; 2) clear length / dollar amounts; 3) language around cancellation and other key terms
- You will post the contract for board approval (almost always on the consent agenda)
- Once approved, you will do steps 2 and onwards from this slide

We have an MOU Template here for you.

Contracts

Here are a few commonly asked questions about contracts

- **Is there a dollar threshold for when the board needs to approve a contract?**
  - In general, all contracts need to go through the board (you can't sign on behalf of the district) regardless of the amount

- **Can we just accept proposed contracts from certain vendors?**

  Yes -- but you need to read the contract and make sure that you understand the vendor and districts obligations under the contract. If you don't understand something in the substance of the contract (not the legal sections like indemnification), ask!

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Other

Below we detail out a few of our other policies

- Conflict of Interest Policy
- Equipment Procedures
- Travel Policy

Conflict of Interest

- Employees (and their relatives) should not be financially interested in any contract made by the board on behalf of the district. Staff may not be engaged in the selection, award, and administration of contracts where they may have an interest. This is true for any award, regardless of the funding source.
- Board members and a few employees are asked to file a conflict of interest statement (a “form 700”) each year
  - For those employees, they should not take gifts beyond those outlined in Government Code 89503 (which currently says $50 or below do not need to be reported, as well as a few other rules). this includes gifts of travel and lodging.
- Employees may be interested in holding additional jobs; board policy governs that. You can find that for instructional staff, classified staff, and management staff at the respective links
- In the case of violations of such standards by officers, employees or agents of the LEA disciplinary action will be applied based on an investigation by the Board of Trustees.

You can see the full conflict of interest policy here

Travel Policy

- All conference attendance of any staff member must be approved by the immediate supervisor, and approved by the Superintendent. Non-staff members (e.g. parents or students) are allowed to have their travel reimbursed, but this also must be approved by the Superintendent.
- The district is permitted to reimburse mileage, but as a general rule rarely does (unless specifically budgeted for in a particular grant).
- Out of state travel must be approved by the Board in advance.
- On specific expenses:
  - The meal reimbursement rate is $50 per day
  - Lodging must be reasonable (i.e. under $175 a night, however please let us know if that's not possible in the geography you are visiting)
  - Airfare must be in economy or coach
- Employees should coordinate with the business office before booking any travel to ensure that the proper documentation is received - specifically for lodging, airline tickets, and registration
  - In general, travel can be purchased in advance and reimbursed
  - Purchases must include a screenshot from Kayak / Google Flights etc. that proves that the select flight is among the more affordable options.
- All expenses must be in a given department's budget and you should plan your travel at least 45 days in advance.

Equipment Purchases

This only applies to equipment purchased that has a cost of more than $500 per unit

- **There are additional tracking requirements for items that have a per-unit cost of greater than $500 per unit. Specifically, you need to record:**
  - Type/description
  - Model/name
  - Serial/identification number
  - Funding source and Federal Award Identification Number
  - Who holds title
  - Acquisition date
  - Original Cost
  - Percentage of Federal participation in the project costs for the Federal award under which the property was acquired
  - Location
  - Use and current condition
  - Transfer, replacement, or disposition of obsolete or unusable equipment
  - Any ultimate disposition data, including the date of disposal and sale price or method used to determine current fair market value

- In general, it is strongly recommended that you do not purchase things that cost more than $500 per unit on federal funds due to the onerous tracking requirements. This can be permissible if the CBO signs off on this purchase in advance.
  - It is our policy to never allowable capital expenses (more than $5,000) on Title funds as these all need to be pre-approved by the state.