

# **PLAINFIELD BOARD OF EDUCATION**

## **Standard Operating Procedure**

### **ACCOUNTS PAYABLE**

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## Accounts Payable Paying the Bills

The Accounts Payable Department is a very important part of the Business Office. Employees of the Accounts Payable Department ensure that vendor bills are paid accurately and in a timely fashion. Vendors will not do business with school districts that do not pay their bills on time.

### **Timely Fashion— within 30-60 days**

**State Law—within 90 days—N.J.S.A. 18A:18A-10.1  
Vendors now can charge interest for late payments**

### **Receiving Goods and Services**

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

### **Receipt of Items Ordered—Immediately Checked for Accuracy**

It is important that all items received be immediately checked for accuracy. The school or office shall do the following:

- Confirm receipt of goods or services
- Open boxes and check off, receive and upload packing slip in financial software
- E-sign and attach the packing slip to the receiving copy of the purchase order
- E-sign the Receiving Copy of the purchase order;

### **The Five (5) Day Rule**

The school principal/office supervisor should sign the receiving copy of the purchase order and send all items within **Five (5) business days** of the receipt of goods to the

### **Accounts Payable c/o Business Office**

### **Vendor Invoices**

Vendors provide invoices to the school district to receive payment for supplying goods or services. Vendor invoices are the source document for accounts payable transactions. It is requested that all invoices be submitted electronically. Invoices should be emailed directly to the Accounts Payable Department at [accountspayable@plainfield.k12.nj.us](mailto:accountspayable@plainfield.k12.nj.us) to avoid the possibility of being overlooked. It is recommended that all purchase orders give vendors clear instructions on where to send their invoices.

### **Review of Invoices**

Invoices should be matched to the district's vendor database, verification of receipt of goods and services, and purchase orders. Accounts Payable staff are to review the invoice with any packing slip as well as what is written on the purchase order. The goods and/or services listed much match on all documents. The name of the vendor/contractor shall be the same on the purchase order as well as the invoice.

All vendor invoices will reference the district purchase order number. If no purchase order is indicated, the accounts payable technician may have to search the purchase order database using vendor, items purchased, and ship-to locations to find the purchase order.

### **Verifying Invoice to Purchase Order**

Accounts payable technicians should verify that the items invoiced match the items ordered on the purchase order. A review should take place to determine the following:

- The vendor information on the invoice matches the vendor information on the purchase order.
- The date of the invoice cannot be before the date the purchase order was issued. If this is the case, Accounts payable staff should immediately contact the School Business Administrator.
- The items ordered or the services received should match the purchase order and invoice.
- The prices or pricing on the invoice should match the purchase order. Unit costs should match on the invoice should match the unit costs on the purchase order.
- All required documents should have been received.
- For services rendered, especially Time and Material invoices, the appropriate district service call document signed by district personnel should accompany the invoice.
- For legal services, professional services and consultant payments, all invoices should be approved by district administrators with a completed log of services accompanying the invoices.
- All travel reimbursement invoices and vouchers should include a copy of the employee travel report, copies of all approvals and supporting documents as required by state law, administrative code, and board policy.

- All tuitions reimbursement shall include all required documents, including copies of the school bill, copies of evidence of payment and appropriate district approval forms.
- Late fees are not to be paid unless pre-approved by the School Business Administrator.
- Invoice including New Jersey Sales Tax charges shall not be paid. The invoice is to be sent back to the vendor to be revised.
- Accounts payable vendor invoice payments should include:
  - Verify that the invoice is not a duplicate. Use the exact vendor invoice number, amount, and date to verify.
- Shipping and handling have been applied correctly per the purchase order.
- Total invoice amount is correct.
- Purchase order encumbrance is sufficient to cover the current invoice.

#### **Incorrect Vendor Invoices**

An invoice may be determined to be incorrect for many reasons. It is not recommended that the district correct vendor invoices, but rather return them to the vendor for correction. This allows the vendor's records to be corrected and saves confusion when the district's payment is received. Invoices requiring vendor correction should be returned promptly within 5-7 days.

## Due Diligence Responsibilities

### **Due Diligence Document Check #1—the names of the vendors match on documents**

Accounts Payable staff are to compliment the activities of the purchasing agent for the collection and review of the following documents:

- Affirmative Action Evidence—Employee Information Report
- Business Registration Certificate
- Chapter 271 Political Contribution Disclosure Form (when applicable)
- Political Contribution Disclosure Form
- Disclosure of Financial Activities in Iran
- W9 IRS Form

AP staff members are to ensure the names of the vendors on all documents submitted are identical. If there is a deviation of any business or vendor name on any of the documents, AP staff members are to bring it to the attention of the School Business Administrator.

### **Due Diligence Document Check #2—the vendor name on the check?**

Accounts Payable staff are reminded ordering from one entity and paying another entity could be problematic. The payment will be made to the entity entitled to receive the monies.

**N.J.S.A.18A:19-1.** The money or funds of the board in the custody of the secretary or treasurer of school moneys shall be expended by the secretary or treasurer of school moneys by, and only by, warrants, each made payable to the order of the person entitled to receive the amount thereof and specifying the object for which it is issued, signed by the president and secretary of the board and the chief school administrator or by the treasurer of school moneys, as appropriate to the district.

## Receipt of Goods/Services □

### A. Processing the Requisition/Purchase Order--Design of Purchase Order

Purchase order is made up of two pages, the first is the purchase order, the second is the notice to vendors.

<u>Related Parties</u>	<u>Disposition</u>
Vendor	Emailed to vendor through financial system
Receiving	Employee will receive goods or services in the financial system
Business Office	Original copy available through DocuSign or financial software

(A Requisition becomes a purchase order after all required administrators have approved the requisition in the Business Office Software System).

### B. Receipt of Goods and Services

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

#### Receipt of Items Ordered—Receiver of Goods and Services

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

- Compare purchase order with packing slip and goods or services received
- Open boxes and check off items received on the receiving module
- If all items are enclosed, then e-sign and upload the packing slip to financial software

#### Accounts Payable Procedures

- If goods and services match obtain copy of invoice
- Prepare payment in financial software

#### Accounts Payable Procedures—Notification Process—Unreturned Paperwork

There will be instances where the Accounts Payable Office will send a courtesy reminder to any school or office that has not uploaded the documents in a timely fashion. The following procedures have been approved by my office:

- First Notice—Five (5) Days

The Accounts Payable Office will send a reminder notice five (5) days later if no documents are received from the school or office.

- Final Notice— Five (5) Days

The Accounts Payable Office will send a Final Notice reminder five (5) days later if no documents are received from the school or office

- Business Operation's Office Contacted—Three (3) Days

Accounts Payable will contact the Business Administrator after three (3) days if the documents are not received from the school or office.

### **C. 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 backorder. The packing slip will have back order written on those particular items.

The process to Follow: Back Orders

If the order is incomplete because there is a backorder, do not wait for the next shipment.

Please do the following:

- Indicate on receiving module the items you did not receive
- Click on the receiving box and upload packing slip to financial software
- Upon receipt of the back order in the next shipment, complete receipt and upload packing slip into the financial software

#### **Problem: Items Missing from Order**

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

Process to Follow: Item(s) Missing

- Call the company and tell them what was missing
- Do not receive on the missing item(s), make notation in the financial software
- Upload packing slip into financial software
- Upon receipt of the missing item(s) in the next shipment, enter receipt and upload packing slip to financial software

#### **Problem: Item(s) Damaged; Wrong Item**

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

Process to Follow: Item(s) 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 packing slip, mark what items were returned, the reasons for being returned, and the method used to return (UPS/PO/Vendor Pick Up).
- Upload packing slip into financial software



- Upon receipt of the replacement/wrong item in the next shipment, receive and upload in the financial software

**Problem: Discontinued Item**

Sometimes the items you requested have been discontinued.

Process to Follow: Discontinued Item

- Mark discontinued on the packing slip “discontinued.” Insert note into financial system and upload packing slip into the financial system
- Do not call the company for a replacement item. You must complete a new purchase order.

## Documentation Required--Services Rendered

### **Service Providers; Consultants**

Service agencies include and are not limited to private schools, charter schools, legal counsel, related services, transportation and private consultants who provide services to the school district.

The scope of work is detailed on the invoice which mirrors the contract accepted by the Board of Education:

- Invoice for services rendered shall detail dates and description of work, the location where services were rendered and time log of services rendered. A service verification report signed by principal/parent and director of department detailing description of work; dates, time and location for related services vendors for related services
- The voucher form must be signed with the original signature by company authorized personnel;
- Proof of attendance applicable to private school vendors;
- Legal counsel invoices must be in detail and accompanied by a detailed report for services rendered and approved by district personnel; and
- Consultant services are supported by signed and dated service verification reports and costs of services agreed to contract accepted and approved by district personnel.

### **Public Works Contractors**

Public works contractors must provide signed and dated documentation.

- The scope of work in detail on the invoice which mirrors the contract;
- Invoices for services rendered detailing dates and description of work, the location where services were rendered and time log of services rendered;

- Invoices for material supplied must be presented by the contractor and/or a secondary invoice for mark-up purposes;
- Service report signed by the principal and/or head custodian and director of building service department detailing the location of work, description of work, date(s) of service and time in and time out of work performed;
- The voucher form must be signed by the authorized personnel of the company.

**Public Works Contractors—Construction Projects—Architect/Engineer**

The Board of Education will provide payment in accordance with the “Prompt Payment” law as codified in N.J.S.A. 2A:30A-1 et seq. All payments to contractors are subject to approval by the Board of Education at a public meeting.

The Director of Facilities and the School Business Administrator shall work closely with the Architect or Engineer of Record for the construction project to ensure compliance with the Prompt Payment Law.

**Types of Payments—Public Works Contractor—Construction Projects**

The Board may make the following types of payments in compliance with the Prompt Payment Law and in accordance with N.J.S.A. 18A:18A-40.1, which requires withholding of funds for construction project payments. Types of payments are

- Progress Payments
- Monthly Payments
- Partial Payments
- Final or Closeout Payments

The Board will work with the Architect or Engineer of Record as to the type of payment, the amount of payment and documents to be submitted for payment including

- AIA document notarized and verified by architect/engineer; and
- Submittal of prevailing wage payroll timesheet as applicable

**Public Works Projects--Payment, Partial, Withholding**

The Accounts Payable staff will work closely with the School Business Administrator on the process of paying contractors who provide public works services to the District. In particular AP staff members should be aware of the following laws as they pertain to paying contractors for public works activities.

- A. Contract Thresholds; Partial Payments/Withholding
  - Contracts – Less than \$100,000 – Lump Sum Payment

Public works contracts less than \$100,000 shall be paid in one lump total sum, upon completion of the project and to the satisfaction of the Board of Education. (Ref. N.J.S.A. 18A:18A-40.1)

- Contracts – Exceeding \$100,000 – Monthly Payments

Public works contracts that exceed \$100,000 shall be paid with partial payments on a monthly basis for work that was completed to the satisfaction of the Board of Education.  
(Ref. N.J.S.A. 18A:18A-40.1)

**B. Withholding of Monies – Percentage to be Withheld**

The Board of Education shall withhold the following percentages of outstanding balances of monies owed to contractors:

- Balances Exceeding \$500,000 Two (2%) Percent
- Balances Less than \$500,000 Five (5%) Percent

The amounts withheld shall be returned to the contracts upon fulfillment of the terms of the contract. (Ref. N.J.S.A. 18A:18A-40.3)

**Travel Reimbursement**

The Board will reimburse all approved travel events in compliance with N.J.S.A. 18A:11-12, N.J.A.C. 6A:23A-7.1 et seq., and board of education policy. Prior to signing and processing a purchase order for the reimbursement, the following documents shall be attached to the PO and reviewed by the School Business Administrator:

- Approval Board Resolution
- Superintendent Approval
- Approval Executive County Superintendent (if applicable)
- Insurance Card (if applicable)
- Travel Commute Sheet (if applicable)
- Travel Report
- Vehicle Registration (if applicable)
- Envelopes with Receipts
  - Tolls—EZ Pass Ok
  - Parking
  - Meals and Refreshments
  - Hotel Bill Marked Paid
  - Airline Tickets with Credit Card Statement
  - Other required receipts when applicable

## Vendor Payment Process

All bills and invoices submitted to the Business Office by the vendor will be sent to the appropriate school district administrator/supervisor for review and approval. The Business Office cannot begin the payment process until it receives the invoices signed and approved by the appropriate administrator.

### **Preparation of Payment Run—VIP Method**

A vendor payment is prepared once the Business Office has a

- **Voucher**—signed by vendor
- **Invoice**—signed by vendor
- **Packing Slips**—signed by school official
- **Receiving document** —signed by school official

### **List of Bills—Bills List of Claims and Demands—N.J.S.A. 18A:19-2, N.J.S.A.18A:19-4**

In accordance with the law, the Business Office, on a monthly basis, prepares a list of vendor bills to be paid. This Bills List has to be presented to the Board of Education for review and approval at a meeting of the board. All payments are made to vendors the following day after the board meeting.

## Bill Payment Processing Procedure

### Steps to Process a payment

- Payments entered on Business Office Financial Software
- Compare entries to reconcile the payment preview list.
- Process vendor payment batch
- Payment review list is generated by the Account Payable Manager and approved by the School Business Administrator for review on the Board agenda.
- Payments are made once per month.
- Copies of payments printed are attached to the payment packet for record-keeping and maintained in accounts payable files in check # sequence.
- Payment to vendors - the normal timeframe is 30 to 60 days and no later than 90 days from receipt of invoice and voucher depending on the situation.
- After the board meeting the state mandated payment to service providers to be paid.
- All orders are paid and presented at Board Public Meetings Electronic payments are processed by the accounting department

There is a law that permits the board of education to authorize the SBA to release vendor checks prior to the board of education meeting.

### Electronic Funds Transfer and Claimant Certification

The Board of Education takes advantage of the opportunity to pay vendor bills through the Electronic Funds Transfer process. If the Board so chooses to do so the Accounts Payable staff will work closely with accounting officials and the School Business Administrator to implement the process.

The Board of Education permits the School Business Administrator to use standard electronic funds transfer (EFT) technologies for EFTs for payment of claims pursuant to N.J.A.C. 5:30-9A.1 et seq. and 5:31-4.1, implementing N.J.S.A. 40A:5-16.5.

“Electronic funds transfer” means any approved method of transferring moneys permitted by N.J.A.C. 5:30-9A.1 et seq. that does not involve the physical presence of a paper check, draft, or similar paper instrument including, but not limited to, wire transfers, e-checks, automated clearing house (ACH) transfers, and transactions initiated by phone or fax.

In accordance with N.J.S.A. 40A:5-16.5.b.(1), the Board of Education authorizes the use of only the forms of standard EFT technologies that are approved to be used by a Board of Education for EFTs for payment of claims. A Board of Education may not utilize procurement cards, charge cards, charge accounts, or any payment services such as PayPal or Venmo.

In accordance with N.J.S.A. 40A:5-16.5.b. (2), the Board designates the **School Business Administrator** as being responsible for the oversight and administration of the provisions of N.J.S.A. 40A:5-16.5, N.J.A.C. 5:30-9A.1 et seq.; N.J.A.C. 5:31-4.1, and Policy and Regulation 6470.01.

The Board of Education will only initiate and approve electronic funds in accordance with N.J.A.C. 5:30-9A.1 et seq. Standard EFT technologies shall incorporate, at a minimum, the features and safeguards outlined in N.J.A.C. 5:30-9A.4 (a). The Board will only utilize standard EFT technologies upon instituting, at a minimum, the fiscal and operational controls outlined in N.J.A.C. 5:30-9A.4 (b).

The School Business Administrator shall initiate a claim for payment by presenting a claim that has been approved by the Board, to be paid using an EFT technology. The School Business Administrator shall submit the claim for payment with all supporting documentation to the Superintendent of Schools or a designee who is not under the direct supervision of the School Business Administrator, who shall review the claim for payment and authorize, in writing, the EFT claim using an EFT method.

The Board of Education shall annually approve the School Business Administrator as the person authorized to initiate a claim for payment and a designee not under the direct supervision of the School Business Administrator as the person responsible to review a claim for payment presented by the School Business Administrator and authorize payment using an approved EFT method.

On no less than a weekly basis, activity reports on all transactions utilizing standard EFT technologies shall be reviewed by an individual designated and approved by the Board that is not under the direct supervision of the School Business Administrator and is not empowered to initiate or authorize EFTs.

Claimant certification for a Board of Education shall be in accordance with the provisions of N.J.S.A. 18A:19-3 and rules promulgated by the New Jersey Department of Education.

Providers of Automated Clearing House (ACH) and wire transfer services must be financial institutions chartered by a State or Federal agency, with the further requirement that these financial institutions providing ACH and wire transfer services be covered under the Governmental Unit Deposit Protection Act (GUDPA), N.J.S.A. 17:9-41 et seq.

EFTs through ACH must utilize Electronic Data Interchange (EDI) technology, which provides transaction-related details including invoice numbers, pay dates, and other identifying information as appropriate for each transaction. The Board must approve an ACH Origination Agreement with the financial institution(s).

## Other Accounts Payable Procedures

### **Ordering Deadline and Open Purchase Orders**

The deadline for ordering items from the current operating budget is May 1<sup>st</sup> of each school year, unless an earlier date is set by the Business Administrator.

Exceptions are:

- Miscellaneous Principals/Supervisors Account;
- Emergency end of year supplies;
- End of year activities such as field trips, graduation and program assemblies;
- Contractual responsibilities;
- Special state and federally funded programs;
- An open PO report is sent to their respective departments and schools for follow up of completion of orders; and
- Open PO's must be identified with a June 30<sup>th</sup> date as either an Accounts Payable Liability or an Open Encumbrance.

### **Open Purchase Order Review—June 30; Letter to Vendor**

Accounts Payable staff shall complete a review of all open purchase orders for the current year ending June 30. The School Business Administrator shall prepare a letter to all vendors who have not submitted final billing or invoices for the school year ending June 30. The letter will advise the vendors of submitting bills in a timely fashion as to render payment within 30 days of the receipt of the letter.

### **End of Year Billing/Cancellation of Purchase Orders**

Administrators are to work with contracted services vendors so that end-of-the-year invoices are submitted to the Business Office in a timely fashion. This is imperative. In order to comply with State of New Jersey, Department of Education requirements, the district has adopted a policy of canceling open purchase orders at the end of the fiscal year. All invoices must be billed within thirty (30) days of services to meet the State Department of Education deadline.

### **Vendor Master File**

Accounts Payable staff shall keep a vendor master file to include by not limited to the following information:

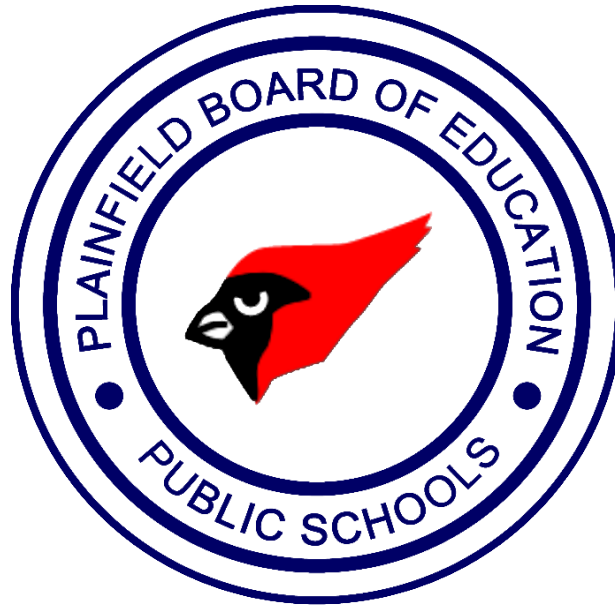
- Coding of vendor file
- Telephone numbers/fax numbers
- Vendors address, city/state/zip
- W-9 Tax Identification Number
- Authorized Agents and Titles

**New Vendors**

New vendors are created in the Business Office Software Programs and vendor documents shall be received by the Board including, when applicable:

- Affirmative Action Evidence—Employee Information Report
- Business Registration Certificate
- Chapter 271 Political Contribution Disclosure Form (when applicable)
- Political Contribution Disclosure Form
- Disclosure of Financial Activities in Iran
- W9 IRS Form





**PLAINFIELD BOARD OF EDUCATION**

**Standard Operating Procedures**

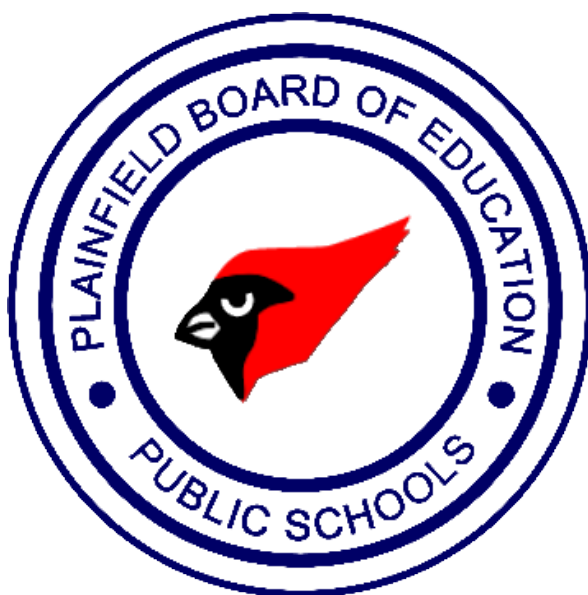
**PURCHASING MANUAL**

**Mr. Rashon K. Hasan  
Superintendent**

**Mr. Mark A. Williams  
Deputy Superintendent**

**Cameron E. Cox  
School Business  
Administrator**

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## **PURCHASING MANUAL**

The Board has prepared a user-friendly Purchasing Manual for district officials. The manual is reviewed and revised on an annual basis. It will be distributed to district officials upon adoption by the Board of Education.

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## **Standard Operating Procedures**

### **Purchasing**

The Board of Education provides standard operating procedures (SOP) for purchasing, is to assist all school district employees with the proper purchasing practices to be in full compliance with:

- New Jersey Public School Contracts Law--N.J.S.A. 18A:18A-1 et seq.;
- New Jersey Administrative Code--N.J.A.C. 5:34-1 et seq.;
- Board of Education Purchasing Policies;
- Federal Procurement Code--2 CFR 200.317 et seq., when applicable;
- NJQSAC Fiscal Indicator #15;
- Local Finance Notices – NJ Division of Local Government Services; and
- Other laws and administrative code when applicable.

The standard operating procedures are designed to achieve three (3) goals:

- Compliance with the law, code and board policy on purchasing;
- Promote efficiency in the purchasing practices; and
- Achieve savings of money through proper purchasing practices.

#### **Proper Planning**

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 with all public school purchasing procedures.

## Deliberative Process—Purchases of Goods and Services Take Time!

- Compliance with Law; Code; Board Policy

Public school purchasing is a deliberative process, designed to ensure compliance with the Public School Contracts Law, appropriate New Jersey Administrative Code, board of education policy and when applicable, Federal Procurement Code.

- Limit Fraud

The deliberative process also encompasses checks and balances and internal controls designed to limit fraudulent activities.

## Mandatory Purchasing Training

All school personnel involved in the requisition and purchasing process shall attend mandatory training sessions concerning proper purchasing procedures. The training will be presented in two (2) sessions:

- **Session I—Purchasing Procedures**

All administrators, supervisors and principals, pursuant to N.J.A.C. 5:34-1.1 (b), shall attend this mandatory training session on purchasing procedures.

- **Session II—Requisition and Purchase Order Process**

All school personnel involved in the preparation of requisitions and purchase orders shall attend this mandatory training session.



## **Ethics and Conduct in Purchasing**

## ETHICS AND CONDUCT IN PURCHASING; VENDOR RELATIONS

All district employees are to practice exemplary ethical behavior in the purchasing process. Employees are to avoid any action that may be considered a conflict with their position with the district and those dealings with vendors who provide goods and services to the district. All district employees should adhere to the following terms and conditions of the board's policy on Ethics and Conduct in Purchasing; Vendor Relations.

### **Federal Code of Standards of Conduct**

The board of education, pursuant to Federal Regulation 2 CFR 200.318 (c) (1), hereby acknowledges the Ethics and Conduct in Purchasing section to be applicable to the selection, award and administration of contracts using federal funds. The code of conduct also applies to all purchases, notwithstanding the source of funding.

### **Financial Interest in any Contract with the Board of Education--Prohibited**

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.

### **School District Responsibility – Favoritism; Family Members; Businesses**

School officials and employees who recommend purchases shall not extend any favoritism to any vendor. Each recommended purchase should be based upon the 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.

### **Vendor Responsibility – Doing Business with the Board of Education**

Any vendor doing business or proposing to do business with the 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 Board of Education or 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 Board of Education, in any manner which might tend to impair the objectivity or independence of judgment of said official or employee.

**Vendor Certification**

Vendors will be asked to certify that no official or employee of the 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 Board of Education.

**Disciplinary Actions for Violations of the Policy--Sanctions**

In accordance with 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.

**Conflict of Interests**

No employee, officer, or agent of the Board of Education may participate in the selection, award, or administration of any contract if he or she has a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or an organization that employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract. Ref. 2 CFR 200.318 (c) (1)

School district employees who are part of an evaluation committee to review responses to Request for Proposals (RFP) and/or to Competitive Contracting proposals will be required to complete a Conflict of Interest certification in accordance with N.J.A.C. 5:34-4.3 (e) (f).

**Possible Conflict of Interest—Contact the School Business Administrator/Board Secretary**

Any school employee who feels there may be a potential conflict of interest with a recommendation of the award with any vendor doing business with the district is encouraged to contact the School Business Administrator/Board Secretary for guidance.

## CRIMINAL CODE CITATIONS

All school employees are reminded of the following New Jersey Criminal Code citations:

### 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.” (N.J.S.A. 2C:27-10)

## **Public School Purchasing Legal Authority**

### **PUBLIC SCHOOL PURCHASING LEGAL AUTHORITY**

#### **Authority to Purchase—School Business Administrator/Board Secretary**

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 legal 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.

For the purposes of this manual, the term Purchasing Agent and School Business Administrator/Board Secretary will be used interchangeably.

#### **Authorized Purchases**

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

#### **Purchase Order--Defined**

A purchase order, pursuant to N.J.S.A. 18A:18A-2 (v), 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 school district 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 and sanctions for unauthorized purchases may be assigned by the Superintendent of Schools, which may include for the employee to pay for the unauthorized purchase.

## Corrective Action for Non-compliance

### **Memo to Administrator**

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.

### **Memo to Superintendent**

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.

### **Letter to Vendor**

The Purchasing Agent will also send a letter to the vendor who provided either unauthorized services or goods. The letter will advise the vendor that payment may not be made for the unauthorized purchase. The Board Attorney will be copied on the letter.

### **District Sanctions and Violations**

All district employees are reminded that the school district may receive sanctions because of unauthorized (confirming) purchases. Employees are to note the following consequences of such actions:

### **Withholding of State Aid—N.J.A.C. 6A:23A-5.4**

The Commissioner of Education may withhold State funds from any school district that fails to obey the provisions of the Public School Contracts Law—N.J.S.A. 18A:18A-1 et seq.

### **NJQSAC Fiscal Indicator #15**

The school district is subject to a penalty of four (4) NJQSAC points for not being in compliance with the Fiscal District Performance Review Item #15, which prohibits confirming or unauthorized orders.

### **Audit Finding and Recommendations**

All financial transactions are subject to audit review. The district may receive an audit finding and recommendation for unauthorized (confirming) purchases. Repeat audit findings may lead to sanctions against the school district.

### **Employee Sanctions**

The Superintendent of Schools may recommend to the Board of Education the filing of sanctions against any employee who does not comply with federal and state purchasing laws and code, board policy and district purchasing procedures. The sanctions may include but are not limited to, paying for any unauthorized purchase, withholding of increment, suspension or tenure charges.

## Purchasing Prohibitions

### **Employees Prohibited from Signing Contracts--Prohibition**

Board of Education employees are prohibited from signing any contract offered by a vendor. The power to sign and execute vendor contracts after Board of Education approval lies with the Board President and the School Business Administrator/Board Secretary.

### **Personal Liability**

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

### **Reimbursements; Employee--Prohibition**

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

### **Student Activity Accounts--Prohibition**

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.

### **Private Purchases -- Prohibited**

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

Employees of the 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 board of education.

## Purchasing Guidance

### **Cancellation of Purchase Orders--Guidance**

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

### **Credit Cards Prohibited**

Pursuant to the New Jersey Department of Education Audit Program page I-5.9, a school district is not permitted to use a credit card for the purchase of goods and services. All purchases are to go through the purchase order process in compliance with the Public School Contracts Law.

### **Contracts; Purchase Order Required--Guidance**

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. N.J.S.A. 18A:18A-2 (v).

### **Preview of Materials--Guidance**

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.



## **Confirming/Unauthorized Purchases**

## **Confirming/Unauthorized Purchases**

The School Business Administrator/Board Secretary shall take the following corrective actions to limit unauthorized purchases. He/she shall develop and institute the following strategies to limit unauthorized purchases.

### **A. Annual Letter to Employees**

Annually, the School Business Administrator/Board Secretary shall send a letter to all employees in the school district, informing them of the possible consequences of unauthorized (confirming) orders.

The letter should highlight the following;

- The authority to purchase;
- Explanation of an unauthorized purchase;
- Laws and code relevant to purchasing; and
- District warning and sanctions.

The letter should be given to all employees and discussed at staff meetings.

### **B. Annual Training Session**

The School Business Administrator/Board Secretary, to be in compliance with New Jersey Administrative Code N.J.A.C. 5:34-1.1(b), should provide an annual training session(s) to all officials involved with the purchasing process. A letter should be sent to all principals and district administrators inviting them to the training session. Attendance is mandatory.

### **C. Annual Letters to Vendors**

The School Business Administrator/Board Secretary should, on an annual basis, send a letter to all vendors who provide goods and services to the school district.

The main focus of this letter is to inform vendors about authorized purchases and unauthorized purchases. The vendors have to be told up front to only accept requests for purchases through the approved purchase order process.

### **D. Formalize the Purchasing Process**

The School Business Administrator/Board Secretary shall formalize the purchasing procedures of the district and highlight the authorization to purchase process.

- Update Board of Education Policy on Purchasing

The School Business Administrator/Board Secretary will review all board policies and regulations to ensure compliance with current laws and code; and to furthermore, codify the actual purchasing practices of the school district.

- Adopt Annual Resolution on Authorization for Purchasing

The board will adopt on an annual basis, a resolution on Authorization for Purchasing of Goods and Services. Among the suggested topics in the board resolution are:

- Authorization to Purchase;
- Aggregation and Remaining Amount;
- Preparation of Bid Advertisement; Opening of Bids;
- Authorized Purchases; and
- Unauthorized Purchases

- Purchasing Manual – Preparing and Adoption

The School Business Administrator/Board Secretary will prepare a working, user-friendly purchasing manual. The manual will be the guidebook for all employees to understand the district's purchasing procedures. The manual should be revised on an annual basis and approved by the board of education, prior to the beginning of the new fiscal year.

The Purchasing Manual should emphasize again, that the only person in the school district that is authorized to purchase goods and services is the Purchasing Agent.

#### **Penalties for Unauthorized Purchases**

Penalties for unauthorized purchases will be determined on a case-by-case basis.

#### **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.

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 attend a special in-service workshop on proper purchasing procedures and any sanction that may be invoked by the Superintendent.

**Methods of Procurement**

## **Methods of Procurement**

The School Business Administrator/Board Secretary shall determine the proper procurement method to be used when applicable.

### **Methods of Procurement for Public Schools**

- Advertise for Bids
- Solicit for Quotations
- Request for Proposals (RFP)
- Competitive Contracting Proposals
- Extraordinary Unspecifiable Services (EUS) and Insurance
- State Contract Purchases
- Emergency Contracts
- Proprietary Purchases
- Concessions
- Cooperative Purchasing Agreements—State and National Co-ops
- Shared Services Agreements
- Sound Business Practices

## Public Bidding

### **Advertising for Bidding—the Standard!**

The State of New Jersey has clearly outlined in N.J.S.A. 18A:18A-4 (a) the following:

*“Every contract for the provision or performance of any goods or services, the cost of which in the aggregate exceeds the bid threshold, shall be awarded only by resolution of the board of education to the lowest responsible bidder after public advertising for bids and bidding therefor, except as is provided otherwise in this chapter or specifically by any other law.”*

It is noted that the State of New Jersey has highlighted that every contract that exceeds the bid threshold shall be awarded to the lowest responsible bidder after public advertising for bids and bidding unless there is another legal procurement method to use.

### **Exceptions to the Bidding**

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 a bid. Some of them are:

- Purchasing through State Contract;
- Cooperative Purchasing Programs
- Professional services as outlined by New Jersey law;
- Textbooks, kindergarten supplies, student-produced publications, library and educational goods;
- 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.

The bidding process may take from six to eight weeks. Administrators are to contact the School Business Administrator/Board Secretary to prepare bid specifications.

## Activities for Bidding

### **Certification of Funds/Cost Estimate**

The School Business Administrator/Board Secretary should certify or receive a certification in writing that funds exist for the bid project thus providing integrity for the bid. In the same certification, there must be provided an estimated cost of the bid. The estimate is required by law—N.J.S.A. 18A:18A-5 (c) (2). This estimate will be a guide on whether the Board of Education wants to reject all bids because the bid prices “substantially exceed the cost estimate of the project.” (N.J.S.A.18A:18A-22(a))

### **Prepare Technical Specifications**

The technical specifications should be prepared by a district administrator seeking the goods or services (ex. Facilities Director, Athletic Director, Food Services Director, etc.) and sent to the School Business Administrator/Board Secretary for review. At this time the administrator should also submit the Certification of Funds and cost estimate.

### **Review of Technical Specifications**

The technical specifications should be reviewed by the School Business Administrator/Board Secretary to ensure that the specifications can be awarded to the lowest responsible bidder and that the specifications are drafted in a manner to encourage “free and open competitive bidding.” (N.J.S.A.18A:18A-15)

### **Prepare Bid Package**

Once satisfied with the technical specifications the School Business Administrator/Board Secretary should prepare the appropriate bid boilerplate package to compliment the project:

- Goods and Services Bid
- Public Works Bid

### **Prepare the Bid Advertisement/Set the Bid Date and Time**

The School Business Administrator/Board Secretary by virtue of the authority bestowed by the State of New Jersey prepares the bid advertisement and sets the bid date and time. The ten (10) day rule takes effect with the advertisement. (N.J.S.A.18A:18A-2(a); 18A:18A-21 et seq.)

### **Set the Pre-Bid Meeting (If necessary)**

The School Business Administrator/Board Secretary may include, if necessary, in the bid package and the bid advertisement, the date and time for a pre-bid meeting. The purpose of the pre-bid meeting is to further explain the technical and boilerplate specifications. Mandatory pre-bid meetings are prohibited.

**Set the Addenda Deadline**

The School Business Administrator/Board Secretary in preparing bid time lines must always be aware that the bid specifications may have to be substantially changed. These substantial changes are done in writing and sent to all bidders, through the addenda process, before seven (7) days of the bid opening, Saturdays, Sundays, and holidays excluded. N.J.S.A. 18A:18A-21 (c) (1) (2)

**Make Copies of the Bid/Mail**

The bids should be mailed to vendors from a pre-determined bid list and to any bidder that makes a request for a bid. The bid list should be part of the bid file for future reference. Some districts put bid advertisements on their web page. (Bid packages may be e-mailed to vendors and it is suggested to send the bids in PDF format.

**Attend the Pre-bid Meeting/Take Minutes (If necessary)**

The School Business Administrator/Board Secretary should attend and chair all pre-bid meetings. Attendance should be taken in writing and if there are any questions and/or changes of a substantial nature they should be addressed in writing in form of an addendum.

**Mail/Fax Addenda (If necessary)**

All addenda should be mailed/faxed in accordance with N.J.S.A.18A:18A-21 (c) (1) (2).

**Receipt of Bids (Segregation of Duties)**

The School Business Administrator/Board Secretary should set up a procedure to properly receive bids and to keep them safely secured until the bid opening. Every attempt should be taken for a person other than the School Business Administrator/Board Secretary to physically receive the bids when possible.

**Bid Opening**

The bid opening should be conducted in full compliance with N.J.S.A. 18A:18A-21 (b) and with the full understanding that the School Business Administrator/Board Secretary opens all bids publicly and announces the prices and contents.

**Analyze Bids and Prepare Spreadsheets**

The School Business Administrator/Board Secretary analyzes all bids received and if necessary, prepares the appropriate spreadsheets to properly evaluate all bids. Guidance from appropriate administrators is permissible.

**Review Bids with Board Attorney (If necessary)**

The School Business Administrator/Board Secretary should review the bids with the Board Attorney if there are questions about possible compliance issues with state/federal law/code. The School Business Administrator/Board Secretary should not unilaterally decide whether a bid is to be recommended for rejection or disqualification.



### **Prepare Board Resolution Awarding/Rejecting Contract**

The School Business Administrator/Board Secretary should prepare the resolution awarding the contract to the lowest responsible bidder and include all bid results in the resolution. A proper record of the prices and terms shall be made in the minutes of the board. Resolutions rejecting any bids should be prepared in concert with the Board Attorney. Once again, all prices are to be in the board resolution awarding a contract.

### **Board of Education Awards Contract**

The Board of Education at a public meeting has the authority to award the contract to the lowest responsible bidder. (18A:18A-4(a))

### **Notify All Bidders of Results**

The School Business Administrator/Board Secretary, as a good business practice, should notify all bidders of the bid results. A copy of the board resolution sent to each bidder would be a good method of notification with a caveat that no work is to begin or no goods to be sent unless the winning bidder has the appropriate signed purchase order.

### **Prepare/Mail Purchase Orders**

The School Business Administrator/Board Secretary should prepare and mail all purchase orders relevant to the bid project with the full understanding that no work is to begin or no good to be sent unless the winning bidder(s) has the signed purchase order. (N.J.S.A.18A:18A-2(v))

### **Prepare/Mail Contracts (If necessary)**

The Board Attorney should prepare formal written contracts for the School Business Administrator/Board Secretary to mail to winning bidders. It is highly recommended that formal written contracts be prepared for all contracts for services and public works that are approved by board of education resolution.

### **Bid File Folder—Minimum Contents**

The School Business Administrator/Board Secretary should ensure that the bid file folder has at the minimum, copies of the following items that are needed for auditor review:

- Attendance Sheet—Bid Opening
- Attendance Sheet—Pre Bid Meeting
- Bid Package—2 Copies
- Bids Received Check-off Sheet
- Certification of Funds Memo
- Legal Bid Advertisement
- Minutes—Pre Bid Meeting
- Original Bids Received from Vendors
- Resolution Awarding Bid—5 copies
- Vendors List of Names and Addresses

## Solicitation of Quotations

## Solicitation of Quotations

The School Business Administrator/Board Secretary shall determine whether the district shall advertise for bids or solicit quotations for goods and services. This method of procurement is used for contracts for goods, materials, services and public work projects that in the aggregate are less than the bid threshold, but 15% more than the bid threshold.

All quotations shall be in writing and will be coordinated by the Office of the School Business Administrator/Board Secretary. When a quotation is deemed necessary, the Administrator/Supervisor or Principal is asked to contact the Business Office. The School Business Administrator/Board Secretary 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.*

### **Certification of Funds/Cost Estimate**

The School Business Administrator/Board Secretary should certify or receive a certification in writing that funds exist for the project thus providing integrity for the proposal process.

### **Prepare Technical Specifications**

The technical specifications should be prepared by a district administrator seeking the goods or services (ex. Facilities Director, Athletic Director, Food Services Director, etc.) and sent to the School Business Administrator/Board Secretary for review.

### **Review of Technical Specifications**

The technical specifications should be reviewed by the School Business Administrator/Board Secretary to ensure the specifications are drafted in a manner to encourage a free and open competitive process.

### **Prepare Quotation Package**

Once satisfied with the technical specifications the School Business Administrator/Board Secretary should prepare the appropriate quotation boilerplate package to compliment the project:

- Goods and Services Quote
- Public Works Quote

### **Prepare the Bid Advertisement/Set the Submission Date and Time**

The School Business Administrator/Board Secretary sets the submission of proposals date and time, which may be from three to seven days upon receipt of proposals by the vendor.

### **Make Copies of the Quotation Proposal**

The proposal should be mailed to vendors via electronic mail whenever possible.

### **Receipt of Responses (Segregation of Duties)**

The School Business Administrator/Board Secretary should set up a procedure to properly receive responses. Every attempt should be taken for a person other than the School Business Administrator/Board Secretary to physically receive the responses whenever possible.

**Submission Date and Time Bid Opening**

Responses for quotation proposals do not have to be publicly opened unless advertised so. The School Business Administrator/Board Secretary should receive all responses by the submission date and time and begin the evaluation process.

**Analyze Responses and Prepare Spreadsheets**

The School Business Administrator/Board Secretary analyzes all responses received and if necessary, prepares the appropriate spreadsheets to properly evaluate all responses. Guidance from appropriate administrators is permissible.

**Review Responses with Board Attorney (If necessary)**

The School Business Administrator/Board Secretary should review the responses with the Board Attorney if there are questions about possible compliance issues with state/federal law/code. The School Business Administrator/Board Secretary should not unilaterally decide whether a response is to be recommended for rejection or disqualification.

**Award of Contract—Price and Other Factors**

The board of education is obligated to solicit at least two (2) competitive quotations and award the contract pursuant to N.J.S.A. 18A:18A-37 (a), to the vendor whose response is most advantageous, price and other factors included.

**Telephone Quotation Solicitations**

The district shall only solicit quotations by telephone in urgent matters and when approved by the School Business Administrator/Board Secretary.

**Request for Proposal  
RFP**

## Request for Proposal

### RFP

The request for proposal (RFP) is a legally recognized procurement method that permits contracting agencies to award a contract to a vendor or respondent based upon the proposal that is most advantageous to the contracting agency, price and other factors considered, and not solely based upon the lowest price.

Services procured through an RFP (Simple RFP compared to Competitive Contracting RFP)  
The RFP method is the most preferred method for awarding contracts for the following services:

Professional Services	Academic/Operational Services (Contracts less than \$40,000)
Auditing; Accounting	Instructional Services
Legal	Educational Services
Engineering, Architectural	Professional Development Services
Medical	
Special Education Related Services (as so designated by the board attorney)	

#### Award of Contract—RFP Evaluative Criteria

The RFP method is designed to award the contract to the vendor or respondent based upon a model evaluation criteria (TMC) which may be found in N.J.A.C. 5:34-4.2 and also as recommended by the NJ State Comptroller's Office with the publication:

#### ***Best Practices in Awarding Service Contracts (2010)***

The award for an RFP contract does not have to be given to the respondent who submits the lowest price. The evaluative process is designed to award the contract to the respondent whose response is most advantageous, price and other factors considered and who will provide the highest quality service at a fair and competitive price.

#### Final Note: Advertising an RFP—Not Required!

There is no legal requirement to advertise a request for proposal that is not part of the Competitive Contracting process. Districts are encouraged to “publicize” each RFP by putting it on the district’s website in PDF format. RFPs shall be publicized when the district uses Federal Funds. When using the RFP process as part of the Competitive Contracting procurement process the district has to advertise pursuant to N.J.S.A. 18A:18A-4.5 (a).

## **Request for Proposal RFP Process**

### **Technical Specifications/Evaluation Criteria Prepared**

The district administrator prepares technical specifications and evaluation criteria for review by School Business Administrator/Board Secretary.

### **Review of Technical Specifications/Evaluation Criteria**

School Business Administrator/Board Secretary reviews technical specifications and evaluation criteria.

### **Request for Proposal Format—Technical Specifications**

The RFP format shall be used when preparing technical specifications for the solicitation of proposals.

### **Purpose of Proposal**

This is where the service required is identified.

### **Scope of Service**

Administrators are asked to fully describe all services they want the vendor to provide to the district. Please be very detailed. Think of everything that is needed for the service. Anything left out may cost the district extra money for the omitted services.

### **Qualifications**

List all minimum qualifications the vendor should meet. Licenses; background checks; experience with public school districts; type and number of personnel needed; facilities and equipment needed; and other matters of importance for the particular contract.

### **Contract Period**

Unless otherwise noted the term of the contract will be from

**July 1, 20\_\_\_\_ through June 30, 20\_\_\_\_\_**

A professional services contract may not exceed 12 months.

### **Presentation Package**

In this section, all respondents are asked to respond to the RFP by preparing a presentation package. Respondents will have to provide in writing

- Fully describe the services they are to provide;
- Provide all evidence of qualifications; and
- Submit a fee proposal; schedule

**Fee Schedule – Payment**

Here you are to advise the consultant on what type of payment process will be used. Do you plan to pay one lump sum after the entire project is completed? Will you pay the vendor per case; evaluation per time frame; or other means of determining payment? It is important that this is explained thoroughly so that you may be able to compare apples to apples.

**Award of Contract**

This is not a bid and therefore the Board of Education does not have to award the contract to the respondent who submits the lowest price.

All RFPs will have the following language:

**Award of Contract**

It is the intention of the Board of Education to award the contract to the respondent based upon relative experience, qualifications and the respondent who will provide the highest quality service at fair and competitive prices.

**Coordination of Activities**

List the person who will coordinate the activities for this contract.

**List of Vendors**

Administrators are to provide with each RFP proposal a list of vendors to whom the proposal will be sent. A minimum of at least three (3) vendors for each proposal should be provided.

**Cost Estimate**

The School Business Administrator/Board Secretary and appropriated district administrator shall prepare a contract cost estimate pursuant to N.J.S.A. 18A:18A-5 (c) (2). The SBA shall certify that funds exist for the project.

**RFP Package Prepared by School Business Administrator/Board Secretary**

The SBA prepares the complete RFP set of specifications ready for distribution.

**Set the Submission Date and Time**

The School Business Administrator/Board Secretary sets the submission of proposals date and time, which may be from ten to twenty days upon receipt of proposals by the vendor.

**RFP Packages Mailed to Potential Respondents**

The School Business Administrator/Board Secretary on the same day of sending the legal advertisement to the newspaper may mail (e-mail) the RFP complete package to potential respondents.



**RFP Specifications Published on Website—Optional**

The School Business Administrator/Board Secretary may place the RFP specification on the district's website.

**Opening of Sealed Proposals**

The School Business Administrator/Board Secretary may publicly open and unseal all proposals received, however, there is no legal requirement to do so.

**Review of Proposals: Appointment of Evaluation Committee**

The SBA may appoint an evaluation committee (if necessary), to assist in the evaluation of all proposals

**Conflict of Interest Statement**

Everyone involved in the evaluation process must file with the SBA a Conflict of Interest Certification. The SBA and the Evaluation Committee may also conduct interviews with respondents.

**Analyze Responses**

The School Business Administrator/Board Secretary analyzes all responses received and if necessary, prepares the appropriate spreadsheets to properly evaluate all responses. Guidance from appropriate administrators and the evaluation committee is permissible.

**Review Responses with Board Attorney (If necessary)**

The School Business Administrator/Board Secretary should review the responses with the Board Attorney if there are questions about possible compliance issues with state/federal law/code. The School Business Administrator/Board Secretary should not unilaterally decide whether a response is to be recommended for rejection or disqualification.

**Award of Contract—Price and Other Factors**

The board of education may award the contract pursuant to N.J.S.A. 18A:18A-37 (a), to the vendor whose response is most advantageous, price and other factors included.

## **Competitive Contracting**

## Competitive Contracting

### **Competitive Contracting** (Certain Contracts Exceeding Bid Threshold)

This procurement method is used for purchases of certain goods and services exceeding the bid threshold.

The district can only use this procurement method for contacts that are outlined in N.J.S.A. 18A:18A-4.1. **Some** of the examples that are permitted are:

1. Proprietary Computer Software for Board Use
  - a. Student Information Systems
  - b. Business Office; Human Recourses
  - c. Student Transportation
2. Professional Development Services
3. Educational Consultant Services
4. Instructional Improvement Services

The award of the contract is similar to the RFP award—an evaluative criteria which includes, price and other factors considered.

## **Competitive Contracting Process**

### **Authorization to Use Competitive Contracting Process**

The School Business Administrator/Board Secretary prepares a board resolution seeking permission from the board to use the Competitive Contracting process.

If State Approval – Division of Local Government Services was needed, the School Business Administrator/Board Secretary writes to the Division for approval.

### **Technical Specifications/Evaluation Criteria Prepared**

The district administrator prepares technical specifications and evaluation criteria for review by School Business Administrator/Board Secretary.

### **Review of Technical Specifications/Evaluation Criteria**

School Business Administrator/Board Secretary reviews technical specifications and evaluation criteria

### **Request for Proposal Format—Technical Specifications**

When using the Competitive Contracting process the RFP format shall be used.

### **Purpose of Proposal**

This is where the service required is identified.

### **Scope of Service**

Administrators are asked to fully describe all services they want the vendor to provide to the district. Please be very detailed. Think of everything that is needed for the service. Anything left out may cost the district extra money for the omitted services.

### **Qualifications**

List all minimum qualifications the vendor should meet. Licenses; background checks; experience with public school districts; type and number of personnel needed; facilities and equipment needed; and other matters of importance for the particular contract.

### **Contract Period**

Unless otherwise noted the term of the contract will be from

**July 1, 20\_\_\_\_ through June 30, 20\_\_\_\_\_**

Professional services contract may not exceed 12 months.

**Presentation Package**

In this section, all respondents are asked to respond to the RFP by preparing a presentation package. Respondents will have to provide in writing

- Fully describe the services they are to provide;
- Provide all evidence of qualifications; and
- Submit a fee proposal; schedule

**Fee Schedule – Payment**

Here you are to advise the consultant on what type of payment process will be used. Do you plan to pay one lump sum after the entire project is completed? Will you pay the vendor per case; evaluation per time frame; or other means of determining payment? It is important that this is explained thoroughly so that you may be able to compare apples to apples.

**Award of Contract**

This is not a bid and therefore the Board of Education does not have to award the contract to the respondent who submits the lowest price.

All RFPs will have the following award of contract language:

**Award of Contract**

It is the intention of the Board of Education to award the contract to the respondent based upon relative experience, qualifications and the respondent who will provide the highest quality service at fair and competitive prices.

**Coordination of Activities**

List the person who will coordinate the activities for this contract.

**List of Vendors**

Administrators are to provide with each RFP proposal a list of vendors to whom the proposal will be sent. A minimum of at least three (3) vendors for each proposal should be provided.

**Cost Estimate**

The School Business Administrator/Board Secretary and appropriated district administrator shall prepare a contract cost estimate pursuant to N.J.S.A. 18A:18A-5 (c) (2). The SBA shall certify that funds exist for the project.

**Competitive Contracting Package Prepared by School Business Administrator/Board Secretary**

The SBA prepares the complete Competitive Contracting/RFP set of specifications ready for distribution.

**Legal Ad – Sent to Official Newspaper**

The School Business Administrator/Board Secretary sends the legal advertisement to the official newspaper the day after Board approval.

**CC/RFP Packages Mailed to Potential Respondents**

The School Business Administrator/Board Secretary on the same day of sending the legal advertisement to the newspaper may mail (e-mail) the CC/RFP complete package to potential respondents.

**CC/RFP Specifications Published on Website—Optional**

The School Business Administrator/Board Secretary may place the CC/RFP specification on the district's website.

**Legal Ad Published--Twenty (20) Days**

Proposals may not be opened until 20 days after the legal ad is published.

**Pre-Submission Meeting (7 business days after publication of advertisement)**

This meeting is held between district officials and potential respondents to discuss the project and competitive contracting process.

**Addenda Preparation—Goal One Day after Meeting**

As a result of the pre-submission meeting, the specifications may need to be amended. Within one day of the meeting, the SBA should prepare and send by certified fax all addenda to potential respondents.

**Notice of Addenda**

A notice of addenda must be published in an official newspaper shall be published in an official newspaper seven (7) days prior to the proposal opening.

**Addenda Received/Notice Published**

The SBA should maintain a copy of the publication of the official addenda to the CC/RFP.

**Opening of Sealed Proposals in Public**

The School Business Administrator/Board Secretary shall publically open and unseal all proposals received at the advertised date and time. The SBA shall read publically, the names of the respondents and the prices of their respective proposals.

If an addendum was issued, seven (7) days must have elapsed from the receipt of addenda, (Saturdays, Sundays and holidays excluded) prior to the opening of the proposals.

**Review of Proposals: Appointment of Evaluation Committee**

The SBA may appoint an evaluation committee (if necessary), to assist in the evaluation of all proposals.

**Conflict of Interest Statement**

Everyone involved in the evaluation process must file with the SBA a Conflict of Interest Certification. The SBA and the Evaluation Committee may also conduct interviews with respondents.

**Preparation of Report and Recommendation of Award--SBA**

In accordance with N.J.S.A. 18A:18A-4.5 (d), the SBA shall prepare a report for the board. The report provides information as outlined in the law. The SBA shall provide a recommendation of the vendor to be recommended for the award.

**Board Committee Review (if necessary)**

The appropriate Board of Education Committee may review the report and ask to review all proposals with the SBA. The Committee or the full board may interview leading respondents.

**Negotiations Not Permitted**

Under no circumstances shall the provisions of the RFP be subject to negotiation. (N.J.S.A. 18A:18A-4.5 (b))

**Award of Contract—Report to the Board**

The School Business Administrator/Board Secretary shall recommend to the board the selection of the vendor(s) through his/her official report to the board. The report shall become part of the public record and reflect the action of the board.

The award of the contract shall be made by resolution of the board of education. The board may reject all proposals pursuant to N.J.S.A. 18A:18A-22.

**Public Notice—Award of Contract**

The SBA shall prepare a Public Notice legal ad notifying the public of the award of the contract. The public notice is to be sent to the official newspaper and published within 20 days of the award.

**Extraordinary Unspecifiable Services  
EUS**



## Extraordinary Unspecifiable Services – EUS

The EUS procurement process is the preferred method to use when procuring insurance or insurance consulting (Broker of Record) services.

### **Extraordinary Unspecifiable Services (EUS) Procurement Process**

When using the EUS procurement process please note the following:

1. Solicitation of Quotations--EUS

N.J.A.C. 5:34-2.3 (a) clearly states that if the estimated cost exceeds 15% of the bid threshold, quotations as to the cost or prices must be solicited by the contracting agent.

The code notes that the contract shall be awarded in accordance with N.J.S.A. 18A:18A-37 (a).

2. Award of Contract—EUS--N.J.S.A. 18A:18A-37 (a)

A review of the law will note the following:

- a. The School Business Administrator/Board Secretary shall solicit at least two (2) competitive quotations if practicable.
- b. The award shall be made to the vendor whose response is most advantageous, price and other factors considered.

3. Simple Quotation/Request for Proposal?

The simple quotation process is acceptable, however, the district shall use the Request for Proposal (RFP) method.

4. RFP: The Request for Proposal Method

The RFP method, when prepared using the guidance of the NJ State Comptroller—*Best Practices for Awarding Service Contracts*, permits the school district to award the contract, based upon a model evaluation criteria of

- a. Technical criteria;
- b. Management criteria; and
- c. Cost criteria

It appears, that by using the above model evaluation criteria found in N.J.A.C. 5:34-4.2 (a), the price and other factors test outlined in N.J.S.A. 18A:18-37 (a) would be satisfied.

## EUS Procurement Process—More Activities

### **1. Certification Required—Prior to Award of Contract**

The designated administrative official (School Business Administrative) shall file with the Board of Education prior to the award of the contract, the following document:

Standard Certification Declaration for an Extraordinary Unspecifiable Service

This document may be found on the NJ Division of Local Government Services website or at the end of Local Finance Notice AU 2002-02. Reference—N.J.A.C. 5:34-2.3 (b)

### **2. Board Resolution Required**

a. Contracts less than the bid threshold

A board resolution is not required by law, however, in the sensitive case of insurance services, it is strongly recommended that a resolution be prepared and adopted by the board of education.

b. Contracts exceeding the bid threshold

A board resolution is required.

### **3. Public Notice Required**

A notice of award of contract procured through the EUS process must be published in an official newspaper no later than 20 days after the passage of the board resolution. The notice of award shall be prepared in accordance with the guidelines as established in Local Finance Notice 2010-3 (Page 2—Letter A)

### **NJ Office of the State Comptroller Guidance**

The district will refer to the guidance issued by the Office of the State Comptroller at a NJASBO Professional Development workshop. The OSC publication on procurement compliance may be found on the NJASBO website—on pages 40-45

**New Jersey State Contract Purchases  
NJ START**

## New Jersey State Contract Purchases

### NJ START

Pursuant to N.J.S.A. 18A:18A-10(a) and N.J.A.C. 5:34-7.29 (c), the School Business Administrator/Board Secretary, without advertising for bids, may purchase goods and services from State Contract vendors who participate with the New Jersey Cooperative Purchasing Program, NJ START.

The State Contract vendors agree to sell goods and services to the Board of Education in accordance and subject to all conditions applicable to the individual state contract.

The School Business Administrator/Board Secretary will review the NJ START website and comply with all rules and regulations of the New Jersey Division of Purchase and Property as it pertains to state contract purchasing.

#### **Board Resolution**

In accordance with N.J.A.C. 5:34-7.29 (c) contracts awarded under a State Cooperative Purchasing contract that are in excess of the contracting units bid threshold shall be made by resolution of the governing body.

#### **System Identifier Number**

The system identifier of **1 NJCP** shall represent the State of New Jersey Cooperative Purchasing Program administered by the Division of Purchase and Property within the Department of the Treasury. This identifier shall be used by all contracting units purchasing under the Division of Purchase and Property's Cooperative Purchasing Program.

Contract amounts awarded to state contract vendor shall not be included in the district's aggregate total.

#### **Major State Contract Purchases**

The School Business Administrator/Board Secretary shall determine when the district purchases goods and services from State Contract vendors. The district will make every opportunity to purchase the following from State Contract vendors whenever possible.

- ① *Office Supplies and School Supplies*
- ② *Computers/Other Technological Devices*
- ③ *Copiers-- Pre-Approval Needed*

#### **Requisitions--State Contract**

All requisitions made through State Contract vendors shall include the following:

- State Contract Number;
- NJ State Contract Cooperative Code: 1NJCP
- Notification of Award;
- Approved Price List; and
- Shipping and Handling Included

#### **State Contracts Using Federal Funds**

State contracts may not be used for purchases over \$3,500.00 in value. However, these vendors may participate in a competitive procurement process that is carried out by the Board of Education.

## Emergency Contracts

## Emergency Contracts

Pursuant to N.J.S.A. 18A:18A-7, the School Business Administrator/Board Secretary may award an emergency contract to a vendor or contract as follows:

### **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**

- Superintendent of Schools Notified  
The Superintendent of Schools is notified by the employee/supervisor/ administrator requesting a declaration of emergency.
  
- School Business Administrator/Board Secretary/Purchasing Agent Notified  
The official in charge of the building or facility, wherein the emergency occurred shall notify the School Business Administrator/Board Secretary/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.

### **Awarding of Contract by School Business Administrator/Board Secretary/Purchasing Agent**

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

### **Filing of Documents with State and County by School Business Administrator/Board Secretary/School Business Administrator/Board Secretary**

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

- A copy of the contract or agreement;
- Nature of the emergency.

### **Acknowledgment by Board of Education**

The Board of Education, at its next regular Board of Education Public Meeting, should review and acknowledge said emergency purchase. This can be done in the form of a board resolution.

The Board resolution is recommended to be one for only an acknowledgment of emergency purchase. State law requires the board to “provide for the payment of the contract price.”

## Proprietary Purchases

## Proprietary Purchases

The School Business Administrator/Board Secretary may purchase goods and services of a proprietary nature for the district.

### **Definition of Proprietary—N.J.S.A. 18A:18A-2 (cc)**

*Proprietary means goods or services of a specialized nature that may be made or marketed by a person or persons having the exclusive right to make or sell them when the need for such goods or services has been certified in writing by the board of education to be necessary for the conduct of its affairs. Sole source vendors are not recognized in New Jersey. (Local Finance Notice 2010-3 p.9)*

### **Computer Software—Proprietary—Educational/Academic—Supplements Textbooks**

Educational/academic proprietary computer software may be excluded from the competitive procurement process if the software meets the test of the definition of “Library and educational goods and services”—N.J.S.A. 18A:18A-2 (r).

Library and educational goods and services are an exception to bidding pursuant to N.J.S.A.18A:18A-5(a) (5). To determine whether the proprietary computer software is an exception one has to refer to the definition of library and educational goods and services and review the following language:

“...specialized computer software used as a supplement or in lieu of textbooks or reference material.” (N.J.S.A. 18A:18A-2(r))

### **Procurement Process**

- Certification in Writing Required:

In accordance with N.J.S.A. 18A:18A-2 (cc) and N.J.A.C. 5:34-9.1 (b), the School Business Administrator/Board Secretary must certify in writing to the Superintendent of Schools why the software is of a “specialized nature and necessary for the conduct of the affairs of the school district. Plainly speaking the SBA has to provide

The compelling reason(s) and the value to the public and the school district why the particular computer software **above all others** will benefit the district.

The SBA will also certify that the computer software will be used as a supplement to textbooks or reference material to meet the test as noted in the library and educational goods and services definition.



## **Procurement Process**

- Proprietary Letter and Proposal from Vendor:

The School Business Administrator/Board Secretary must obtain from the vendor, a letter certifying that the computer software is proprietary and that no other person or business makes the software and/or sells the software. Attached to the letter will be a written proposal from the vendor fully outlining the purchase and the associated costs.

- Resolution

The School Business Administrator/Board Secretary will prepare the board resolution fully outlining the proprietary purchase and include the certification language in the resolution.

- Document Submission:

The School Business Administrator/Board Secretary shall obtain the required documents prior to the award of contract. They include:

- Affirmative Action Evidence—Employee Information
- Chapter 271 Political Contribution Disclosure Form
- NJ Business Registration Certificate and Iran Form
- Iran Financial Disclosure

- Requisition/Purchase Order:

The requesting administrator will prepare the requisition/purchase order for this purchase and submit it to the School Business Administrator/Board Secretary prior to the board meeting date.

**Computer Software**—Proprietary, Educational/Academic – (Non-Supplemental) - Bid or Quotation Required:

Educational/academic computer software that does not supplement textbooks or reference material shall be procured through a bid or quote process depending on the total cost. The requesting administrator shall provide the following:

- Certification in Writing;
- Letter from the vendor—proprietary computer software;
- Bid specifications fully outlining the purchase; and

The School Business Administrator/Board Secretary shall either advertise for bids or solicit quotations, again depending on the estimated costs.

**Computer Software—Board of Education Use**

The purchase or licensing of proprietary computer software designed for Board of Education purpose shall be purchased through the competitive contracting process or advertisements for bid (purchase exceeds the bid threshold).

Examples of Board of Education purpose:

- Financial Software
- Student Information Systems
- Human Resources Software
- Student Transportation Software

The School Business Administrator/Board Secretary shall also provide a certification letter to the Superintendent.

**Goods and Services—Proprietary**

For the purchase of all other proprietary goods and services, the School Business Administrator/Board Secretary shall secure prices through the bid or quotation process.

The SBA shall also prepare a letter of certification and obtain a letter from the vendor.

**Computer Software—Proprietary—Maintenance and Support**

Purchases for the maintenance and support of proprietary computer software are considered to be an exception to the bidding process. (N.J.S.A. 18A:18A-5(a-19)). The School Business Administrator/Board Secretary shall provide the following:

- Certification of Need;
- Proprietary letter from vendor;
- Written cost proposal from vendor;
- Document submission assistance.

## **Concessions**

## Concessions

The School Business Administrator/Board Secretary may purchase goods and services through the concession procurement process as follows:

### **Concession** N.J.S.A. 18A:18A:2(aa)

Means the granting of a license or **right to act on behalf of the Board of Education** or to provide a service requiring the approval of endorsement of the Board of Education and which may or may not involve payment of exchange, or provision of services by or to the board of education provided that the term concession shall not include vending machines.

### **Services** N.J.S.A. 18A:18A-2 (dd)

Service or services may also include an arrangement in which a vendor compensates the board of education for the vendor's right to operate a concession.

### **Examples of Concessions** N.J.A.C. 5:34-9.4 (b)

#### ➤ **Selling Advertisements**

Publishing a map, newsletter, directory, or calendar containing the meeting schedules and other information about the "school district" services or activities where the contractor sells advertising as full or partial payment for providing the service.

Example—selling advertisement on a school vehicle

#### ➤ **Welcome to Sign**

Installation of "welcome to" signs on public property where a local organization pays a fee to the sign manufacturer, who may or may not make a payment to the contracting unit, and includes the name of the local organization on the sign.

#### ➤ **Use of Public Space**

The use of public space or facilities

Example, scoreboards, bus shelters, facility advertising for advertising in exchange for fees or services, or discounts on services.

#### ➤ **Vending Machines (other than food and drink)**

The installation of vending machines in public facilities. (Not newspaper machines) 9(c)

#### ➤ **Donations, Sale of Equipment**

The donation, sale, installation, or maintenance of equipment of facilities for use of the contracting unit.

#### ➤ **Copying Machines--Public Use**

#### ➤ **Selling of goods on Public Property**

#### ➤ **Other services, rights or use may meet the definition of concession**

Example—school uniform vendor named on the website



## **Concession Process**

In accordance with N.J.A.C. 5:34 - 9.4 (d)

The governing body shall

### **Obtain Legal Opinion**

The legal counsel (board attorney) shall provide an opinion of the legality of procuring a concession

### **Pass a Resolution**

Pass a resolution authorizing the procurement of a concession

The resolution shall include:

- Description of the public need for the concession;
- The concession to be awarded (type);
- The considerations (benefits and risks) the governing body took into account in reaching the decision to award a concession;
- An estimate value of the concession;
- An estimate of any revenue or services to be received by the governing body;
- Basis of award of the concession is based upon the most advantageous price and other factors;
- An estimate of costs to be received by the governing body;
- Any services, facilities or endorsement to be provided by the governing body;
- The method to be used to procure the concession.

### **Awards of Contract N.J.A.C. 5:34-9.4 (g) Methods of Procurement**

- Quotations--total value of concessions less than the bid threshold
- Public Bid
- Competitive Contracting

**Cooperative Purchasing  
State and Local**

## Cooperative Purchasing

The School Business Administrator/Board Secretary may procure goods and services through various state and local cooperative purchasing systems, without advertising for bids.

A cooperative purchasing or joint purchasing system means a purchasing system in which the lead agency serves as the purchasing agent for the membership of the system with all of the duties and responsibilities attendant thereto. The lead agency advertises for bids and awards a single contract to a vendor providing for the payment to the contractor for its own needs and the needs of the participating registered members of the system.

The lead agency is the contracting unit which is responsible for the management of the cooperative purchasing system. Recognized contracting units for purposes of public and nonpublic school districts are, but are not limited to:

- Boards of Education
- Educational Services Commissions
- Regional Services Commissions
- County Special Services Districts
- Other recognized entities; e.g. NJSBA TEC Program

To apply for membership with an authorized cooperative purchasing entity, the board of education shall pass a resolution and execute a formal agreement with the lead agency. The board of education is bound by the terms of the agreement and N.J.A.C. 5:34-7.1 et seq. Ref. N.J.A.C. 5:34-1.2-Definitions; N.J.A.C. 5:34-7.4 (a); N.J.A.C. 5:34-7.6 (a).

### **Award of Contracts—Cooperative Purchasing Contracting Unit (Lead Agency)**

The cooperative purchasing contracting unit (lead agency), procures goods and services for its use and for use by its membership. The lead agency awards the contracts through board resolutions.

### **Award of Contracts—Boards of Education**

It is highly recommended when using a contractor or vendor procured by a lead agency, boards of education also award the contract by board resolution when the contract exceeds the bid threshold.



**Procurement Documents—Cooperative Purchasing Contracting Units (Lead Agency)**

The lead agency, in procuring goods and services, requires from vendors and contractors certain procurement documents such as, but not limited to:

- Affirmative Action Certificate
- Business Registration Certificate
- Chapter 271 Political Contribution Form
- Iran; Financial Disclosure Activities
- Non-collusion Affidavit
- Statement of Ownership (Stockholder’s
- Insurance Certificate

**Procurement Documents—Boards of Education**

The School Business Administrator/Board Secretary will maintain on file, the aforementioned documents and other documents that may be needed from vendors and contractors.

**Procurement Documents—Contractors—Public Works Contracts**

The School Business Administrator/Board Secretary will maintain on file the following documents when using a cooperative purchasing vendor for public works contracts.

- Notice of Classification—public work exceeding \$20,000
- Total Amount of Uncompleted Contracts—public work exceeding \$20,000
- Contractor Registration Certificate—Public Work Exceeding \$2,000
- Affirmative Action Form AA-201—Send to Contractor
- Prevailing Wages Notification—Send to Contractor
- Insurance Certificate

**Cooperative Purchasing System Identifiers—Include on Purchase Orders**

School districts are required by administrative code to identify the cooperative group and include the identification number on the purchase order. Examples of system identifier numbers that may be used by the board.

1NJCP	New Jersey State Contract vendors
26EDCPS	Educational Data Services, Inc., vendors
65MCECCPS	Educational Services Commission of New Jersey vendors
34HUNCCP	Hunterdon County Educational Services vendors
E8801-ACESCPS	ACES Program

**Cooperative Purchasing**

**National Co-ops**

## Cooperative Purchasing National Co-ops

The School Business Administrator/Board Secretary may procure goods and services through various national cooperative purchasing groups, without advertising for bids and only when the contract in the aggregate exceeds the bid threshold.

### **State of New Jersey Guidance—Procuring Goods and Services—National Cooperatives**

On May 14, 2012, the New Jersey Division of Local Government Services issued Local Finance Notice LFN 2012-10, which provides guidance to contracting agents on how to procure goods and services with National Cooperative vendors.

The School Business Administrator/Board Secretary shall comply with the following guidance as outlined in the Local Finance Notice:

#### **Cost Savings Determination**

The School Business Administrator/Board Secretary shall do a cost-saving determination by reviewing the prices of the goods and services offered by the National Co-op vendor. The (cost-savings) documentation, which would be reviewed as part of an **audit**, and which is subject to disclosure under the Open Public Records Act, should be kept on file as part of the award package.

#### **Maintain Vendor Documents**

The School Business Administrator/Board Secretary shall maintain on file all vendor documents as required by the State of New Jersey including but not limited to:

- New Jersey Business Registration Certificate
- Statement of Corporate Ownership
- Affirmative Action Evidence
- Chapter 271 Political Contribution Disclosure Form
- Iran; Disclosure of Investment Activities Form
- Other documents per the board of education.

#### **Legal Advertisement Requirements--Public Notice of Intent**

The School Business Administrator/Board Secretary shall have a notice of intent to use a national cooperative vendor published in a legal newspaper at least ten days prior to the award of contract.

#### **Public Works Contracts Prohibited**

The School Business Administrator/Board Secretary will ensure that contracts for public works will not be awarded to National Cooperative vendors.

## Shared Services Agreements

## **Shared Services Agreements**

The School Business Administrator/Board Secretary shall identify those goods and services that may be procured through a shared services agreement with the local municipality. All shared services agreement shall comply with Uniform Shared Services and Consolidation Act." N.J.S.A. 40A:65-1 et seq.

### **Examples of Shared Services**

- Garbage Pickup
- Loaning of Equipment
- Police/SRO Contract
- Purchase of Diesel Fuel
- Recreation—Use of School Facilities
- Snow Plowing

### **Procedures for a Shared Services Agreement**

Written proposals from the City and the Board should be reviewed administratively and presented to the appropriate government bodies for consideration.

Once both government bodies adopt the resolutions in accordance with N.J.S.A. 18A:18A-1 and the contracts are signed (purchase orders prepared if needed), then the services can begin.

## Professional Services

## Professional Services

The School Business Administrator/Board Secretary in consultation with the Board Attorney has determined the following services to be considered “professional services” as defined below.

### **Definition--Professional Services—N.J.S.A. 18A:18A-2 (h)**

Professional services means services rendered or performed by a person authorized by law to practice a recognized profession and whose practice is regulated by law and the performance of which services requires knowledge of an advanced type in a field of learning acquired by a prolonged formal course of specialized instruction and study as distinguished from general academic instruction or apprenticeship and training. Professional services may also mean services rendered in the provision or performance of goods or services that are original and creative in character in a recognized field of artistic endeavor.

### **Examples of Professional Services**

Some “safe” examples of professional services are:

Legal	Medical
Auditing	Accounting
Architectural	Engineering
Special Education Related Services	

The School Business Administrator/Board Secretary further recognizes the following:

### **Contract Term—Professional Services (12 months) N.J.S.A. 18A:18A-3(b), N.J.S.A. 18A:18A-42**

Any contract made pursuant to this section may be awarded for a period of 24 consecutive months, except that contracts for professional services pursuant to paragraph (1) of subsection a. of N.J.S.A. 18A:18A-5 may be awarded for a period not exceeding 12 consecutive months.  
N.J.S.A. 18A:18A-3 (b)

All contracts for the provision or performance of goods or services shall be awarded for a period not to exceed 24 consecutive months, except that contracts for professional services pursuant to paragraph (1) of subsection a. of N.J.S.18A:18A-5 shall be awarded for a period not to exceed 12 consecutive months.

### **Renewal of Contracts for Professional Services—Prohibited— N.J.S.A. 18A:18A-42**

Any contract for services other than professional services, the statutory length of which contract is for three years or less, may include provisions for no more than one two-year, or two one-year, extensions.

**Exception to Bidding—Professional Services—N.J.S.A. 18A:18A-5(a) (1)**

Professional services are an exception to bidding, however, administrative codes note there shall be some sort of selection process documented.

**Procurement Method; Deliberative Process, Comparable Process, RFP or Competitive Contracting**

The School Business Administrator/Board Secretary will either use a deliberative or comparable process to ensure the district receives the highest quality services at a fair and competitive price or through a shared service arrangement. This may include, but is not limited to, issuance of such contracts through a request for proposals (RFP) based on cost and other specified factors or other comparable process—N.J.A.C. 6A:23A-5.2 (a) (5)

**Procurement Method Suggested—Professional Services Contracts**

The school districts shall procure all professional services contracts as follows:

RFP Process—State or Local Funding

RFP Process—Less than the bid threshold when using Federal funds

Competitive Contracting Process—More than the bid threshold when using Federal funds

**Public Notice and Reason for Award of Contract Required—N.J.S.A. 18A:18A-5 (a) (1)**

The School Business Administrator/Board Secretary further recognized the board of education, shall in each instance state supporting reasons for its action in the resolution awarding each contract and shall forthwith cause to be printed once, in an official newspaper, a brief notice stating the nature, duration, service and amount of the contract, and that the resolution and contract are on file and available for public inspection in the office of the board of education

Said Public Notice of Award shall be published within 20 calendar days after the passage of the resolution awarding the contract.



**Federal Funds  
Procurement Process**

## **Federal Funds**

### **Procurement Process**

The board of education receives monies from the federal government. It is noted that when procuring goods and services federal funds, the district is to comply with Federal Procurement regulations (2 CFR 200.317 et seq.) and the New Jersey Public School Contracts Law. (N.J.S.A. 18A:18A-1 et seq.)

#### **Examples of Federal Funding—Every Student Succeeds Act (ESSA)**

- Title I, Part A – Improving Basic Educational Programs Operated by LEA's
- Title II, Part A – Supporting Effective Instruction (Educators)
- Title III, Part A – English Language Acquisition, Language Enhancement, and Academic Achievement
- Title IV, Part A – Student Support and Academic Enrichment Grants (Programs)
- ESSER I. II Funds; ESSER ARP Funds

#### **Other Examples of Federal Funding**

- I.D.E.A. Individuals with Disabilities Education Act-- Part B Handicapped
- Perkins Vocational and Technical Education Improvement Act
- National School Lunch Program
- National School Breakfast Program
- E-rate Purchases

#### **New Jersey Department of Education Guidance on Federal Spending**

All grant administrators and the School Business Administrator/Board Secretary will comply with federal regulations and the Public School Contracts Law and will adhere to the guidance as provided by the New Jersey Department of Education in the publication entitled *Navigating the Uniform Grant Guidance*.

#### **New Jersey Department of Agriculture; Food and Nutrition**

The district will comply with the federal regulations on purchasing of food services goods and services. To assist school districts, the USDA and the NJDOA have issued seven (7) documents for SBA's to read, learn and utilize. They are as follows:

- Form #325—Code of Conduct and Procurement Procedure Checklist
- Form #326—Sample Procurement Procedures for School Authorities
- Form #327—Sample Code of Conduct for Food Procurement
- Form #331—Informal Procurement Log
- Form #358—Federal Funds Procurement Method Selection Chart
- Form #383—Sample Procurement Procedures
- USDA Memo—Buy American

### More Restrictive Clause

When there are differences between federal procurement regulations and the Public School Contracts Law, the district will follow that which is more restrictive as outlined in Local Finance Notice 2010-3

*“Federal regulations require districts to follow the NJ Public School Contracts Law **except where the federal standards detailed in EDGAR 80.36 are in conflict or more restrictive.**” Page 10*

### Methods of Procurement—When Using Federal Funds

All procurement transactions must be conducted in a manner providing full and open competition. (2 CFR 200.319). Examples of procurement methods to be used:

- **Micro-purchases—Purchases less than \$3,500.00**

The School Business Administrator/Board Secretary shall use sound business practices for purchases in the aggregate that do not exceed \$3,500.00. Reference--2 CFR 200.320 (a) and 2 CFR 200.67

- **Small Purchase Procedures—\$3,500 through \$39,999**

The School Business Administrator/Board Secretary shall use the competitive quotation process as outlined in N.J.S.A. 18A:18A-37 (a) or the Request for Proposal process, when applicable, in procuring goods and services in the aggregate of more than \$3,500.00 and less than \$39,999. Reference--2 CFR 200.320 (b) and 2 CFR 200.88

- **Sealed Bids—\$40,000 or more**

The School Business Administrator/Board Secretary shall use the competitive bid process to procure those contracts which in the aggregate exceed the \$40,000 bid threshold. The contract shall be awarded to the vendor who submits the lowest responsible bid for a firm fixed contract price—lump sum or unit cost. Reference--2 CFR 200.320 (c),

- **Competitive Proposals—\$40,000 or more**

The School Business Administrator/Board Secretary shall use the Request for Proposal (RFP) or competitive contracting process when procuring certain contracts which in the aggregate exceed the \$40,000 bid threshold, which are to be awarded by an evaluative process, rather than a firm fixed contract price. Reference--2 CFR 200.320 (d) and N.J.S.A. 18A:18A-4.1 et seq.

- **Non-competitive Proposals (Sole Source)**

Although the Federal government recognizes contracts may be awarded to sole source vendors through non-competitive proposals, the School Business Administrator/Board Secretary shall use the competitive proprietary bid process or the competitive contracting process for sole or single source contracts. Reference 2 CFR 200.320 (f) and N.J.S.A. 18A:18A-15

### **The amounts listed are the current thresholds and are subject to change. Federal Contracts Requirements Addenda —Procurement and Contract Documents**

The federal government, pursuant to 2 CFR Appendix II to Part 200, requires all contracts made by the non-Federal entity (school district) contain certain provisions.

## 2 CFR Appendix II to Part 200

The School Business Administrator/Board Secretary will ensure all contract and procurement documents contain language as noted in the Appendix II to Part 200 to include at the minimum the following:

- Administrative, contractual or legal remedies in instances where contractors violate or breach contract terms and provide for sanctions and penalties as appropriate;
- Termination for causes and for convenience;
- Equal Employment Opportunity language;
- Davis-Bacon Act language;
- Copeland Anti-Kickback Act language;
- Contract Work Hours and Safety Standards Act language;
- Rights to Inventions Made Under Contract or Agreement language;
- Clean Air Act language;
- Debarment and Suspension language with reference to SAM; and
- Byrd Anti-Lobbying Amendment language.

### Debarment and Suspension of Vendors

The School Business Administrator/Board Secretary will ensure that no contracts are issued to any vendors that are on the federal debarment or suspension list and will comply with the following:

Confirmation of Vendor on SAM.gov/Exclusions-- Excluded Parties List System (EPLS)  
Prior to contracting with a vendor, the Purchasing Agent shall use the System for Award Management (SAM) (SAM.gov/Exclusions) to search for the vendor by name, tax identification number, or another characteristic to verify the vendor has not been suspended or debarred from performing federally funded work. This is part of the Federal Excluded Parties List System (EPLS) which is an electronic directory of individuals and organizations that are not permitted to receive federal contracts or assistance from the United States government.

It is recommended that evidence of verification (printout from SAM.gov/Exclusions) be maintained in procurement files for each contract awarded.

### **Federal Programs—Include Requisitions/Purchase Orders**

When using Federal Funds, the following shall be included on the purchase order document

- Name of Federal Program
- Quotation, bid number, if applicable
- Name of Cooperative Purchasing Entity; if applicable
- Board approval date; if applicable
- Location(s) of equipment
- Federal funding account numbers easily identified if split funding
- Approved CIP Code; if required (Classification of Instructional Programs)

Standards of Conduct; Conflict of Interests--2 CFR 200.318 (c) (1)

**The School Business Administrator/Board Secretary will** establish and apply a Standard of Conduct; Conflicts of Interests for all procurement of goods and services when using federal funds.

**Standards of Conduct; Conflicts of Interests**

The Board of Education Board of Education pursuant to **Federal Regulation 2 CFR 200.318 (c) (1)**, hereby establishes the following *Standard of Conduct; Conflict of Interests* in the selection, award and administration of contracts using federal funds.

**Conflict of Interest**

No employee, officer, or agent of the Board of Education may participate in the selection, award, or administration of a contract supported by a Federal award if he or she has a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract. Reference 2 CFR 200.318 (c) (1)

**Financial Interest; Involvement in Contracts**

No person officially connected or employed with, the Board of Education shall be an agent for, or be in any way pecuniarily or beneficially interested in, or receive any compensation or reward of any kind for, the sale of any textbooks, school apparatus or supplies of any kind, for use in the school district with which he is connected or by which he is employed or within the state or part thereof over which his jurisdiction extends, upon penalty of removal from office or of revocation of his certificate to teach or to administer, direct or supervise the teaching, instruction or educational guidance of pupils in the public schools, but the prohibition of this section shall not prevent any person from receiving royalties upon the sale of any textbook of which he is the author. Reference N.J.S.A. 18A:6-8

No school official shall act in his official capacity in any matter where he, a member of his immediate family, or a business organization in which he has an interest, has a direct or indirect financial involvement that might reasonably be expected to impair his objectivity or independence of judgment.

No school official shall act in his official capacity in any matter where he or a member of his immediate family has a personal involvement that is or creates some benefit to the school official or member of his immediate family. N.J.S.A. 18A:12-24 (c)

**Solicitation/Receipt/Acceptance of Gifts and Gratuities from Contractors**

The officers, employees, and agents of the Board of Education may neither solicit nor accept gratuities, favors, or anything of monetary value from contractors or parties to subcontracts.

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.

N.J.S.A. 18A:12-24 (e)

**Contractor/Vendor Responsibility – Doing Business with the Board of Education**

Any vendor doing business or proposing to do business with the Board of Education 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 Board or 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 Board, in any manner which might tend to impair the objectivity or independence of judgment of said official or employee.

**Disciplinary Actions for Violations of Standards**

Officers, employees and agents of the Board of Education Board of Education who violate the standards of conduct, shall be subject to administrative disciplinary actions which may lead to suspension of employment; removal of office and revocation of his certificate to teach or administer in the State of New Jersey.

## **Renewal of Contracts**

## Renewal of Contracts

The School Business Administrator/Board Secretary may recommend to the board of education for consideration, contracts for services to be extended or renewed. All recommendations shall be in compliance with N.J.S.A. 18A:18A-42 the paragraph after the letter “o.”

### **N.J.S.A. 18A:18A-42**

Any contract for services, other than professional services, the statutory length of which contract is for three years or less, may include provisions for no more than **one two-year**, or **two one-year**, extensions, subject to the following limitations:

- a.** the contract shall be awarded by resolution of the board of education upon a finding by the board of education that the services are being performed in an effective and efficient manner;
- b.** no such contract shall be extended so that it runs for more than a total of five consecutive years;
- c.** any price change included as part of an extension shall be based upon the price of the original contract as cumulatively adjusted pursuant to any previous adjustment or extension and shall not exceed the change in the Index Rate for the 12 months preceding the most recent quarterly calculation available at the time the contract is renewed; and
- d.** the terms and conditions of the contract remain substantially the same.

Contracts are set at a maximum length of three (3) years by statute. These contracts may include provisions that will allow the Board of Education to extend the contract for one (1) or two (2) years, but will be subject to the following limitations:

- The contract renewal shall be awarded by Board resolution;
- No contract shall be extended so that it runs for more than five (5) consecutive years;
- Any change in price shall not exceed the change in the Index Rate for the 12 months preceding the most recent quarterly calculation at the time the contract is renewed; and
- The terms and conditions of the contract substantially remain the same.

All multiyear leases and contracts subject to one or two-year extensions, excluding contracts related to insurance and class I renewable energy, shall contain a clause stating that the contract will be subject to the availability of sufficient funds.



## Contract Renewal Procedures

### **School Business Administrator/Board Secretary Review**

The School Business Administrator/Board Secretary shall identify those contracted services, pursuant to N.J.S.A. 18A:18A-42, that are eligible for extension or renewal.

### **Contacting Appropriate District Administrator**

The School Business Administrator/Board Secretary shall contact the appropriate district administrator and inform the administrator of contracts eligible for extensions or renewals.

The SBA will request input from the administrator on whether a contracted service vendor/contractor should have their contract considered for renewal by the board of education.

### **Evaluation and Recommendation Form**

The district administrator (e.g. Director of Facilities) who is recommending a contract to be considered for renewal, shall complete the Chart of Contract Renewals and a Vendor/Contractor Evaluation and Recommendation Form for each contracted service vendor/contractor.

The forms are to be submitted to the School Business Administrator/Board Secretary.

### **Letter to Contracted Service Vendor/Contractor**

The School Business Administrator/Board Secretary shall prepare and send a letter to each vendor recommending a renewal of the contract. The letter informs the vendor of the school district's interest in a possible renewal and asks the vendor to respond if there is an interest to renew with the district.

### **Board Resolution for Renewal of Contract**

The resolution for consideration of a contract renewal shall be prepared in the format normally used by the district. It is recommended the following highlighted information be used in all resolutions:

### **Documents from Vendor/Contractor**

Prior to the award of the contract and/or issuing of a purchase order, the School Business Administrator/Board Secretary shall possess the following documents from each vendor being recommended for renewal of the contract:

- Affirmative Action Certificate
- Business Registration Certificate
- Iran Disclosure Form—required by law
- Insurance Certificate Updated—when applicable
- Contractor's Registration Certificate—when applicable

The district should also confirm with the contractor of Prevailing Wages information, again when applicable.

### **After the Board Meeting**

The School Business Administrator/Board Secretary shall prepare and send a letter to the vendor informing him of the renewal of the contract. A purchase order shall accompany the letter. The appropriate administrator and board attorney shall be copied on the letter.

**Annual Report--Board of Education**

**District Contracts**

## **Annual Report--Board of Education**

### **District Contracts**

The School Business Administrator/Board Secretary will ensure compliance with N.J.S.A. 18A:18A-42.2, which requires the board of education to receive a report of contracts that the Board has awarded, intends to award or has renewed contracts with vendors during the past 12 months, ending June 30. This would include contract awards pursuant to New Jersey's procurement laws; i.e. bids for goods and services, transportation, as well as awards pursuant to board resolution for professional and extraordinary unspecifiable services.

The School Business Administrator/Board Secretary shall prepare the report and include in the board meetings the acknowledgment of the report in the board minutes. The School Business Administrator/Board Secretary will review the minutes of the board of education for the school year ending June 30 for all contracts that were awarded or renewed with vendors.

The report will provide at a minimum the following:

- Name of Vendor
- Award Date
- Description of Contract
- Contract Amount

**Public Notice**  
**Award of Contracts**

## Publication of Contract Award Notices

In accordance with the Public School Contracts Law, school districts have to place a “notice of award” in an **official** newspaper for the award of certain contracts. They are:

<b>Contract Award</b>	<b>Citation</b>
Professional Services Contracts*	N.J.S.A. 18A:18A-5 (a) (1)
Competitive Contracting Contract Awards	N.J.S.A. 18A:18A-4.5 (g)
EUS Contract Awards*	N.J.S.A. 18A:18A-5 (a) (2)

\*The district shall publish a notice of award for contracts that exceed the bid threshold.  
*Reference—Local Finance Notice 2010-3 Letter A.*

### **Deadline for Publication—Twenty (20) Days**

The district shall publish a notice of award no later than twenty (20) days after the passage of the resolution awarding the contract.

*Reference—N.J.A.C. 5:34-9.5 (d).*

### **Inclusion of Services—Meeting the Definition of Professional Services**

Purchasing agents are to review the definition of professional services to ensure the services listed in the public notice are indeed professional services.

### **Advertisement Requirements**

- Name of Vendor
- Nature of the contract
- Duration of the contract (term of the contract)
- Description of services
- Amount of the contract (a)
- A statement that the contract is on file and available for public inspection

### **Amount of Contract—Total Amount of Contract; No Hourly Rate**

The contract amount placed in the public notice shall be for the total amount of the contract. Hourly rate amounts are not acceptable. Whatever the total amount of the contract is on the purchase order has to match the total amount in the board resolution and in the public notice advertisement. *Reference LFN 2010-3 Letter A.*

**Sample Public Notice**

**PUBLIC NOTICE  
PLAINFIELD BOARD OF EDUCATION  
PLAINFIELD, NEW JERSEY**

**Award of Contracts**

<b>Name</b>	<b>Description Services</b>	<b>Est. Amt.</b>	<b>Term</b>
Immedicenter Clifton, NJ	Medical Inspector	\$60,000	July 1, 2022- June 30, 2023
Greenhouse Therapy Passaic, NJ	OT/PT Services	\$100,000	July 1, 2022- June 30, 2023
Brown & Brown Metro Florham Park, NJ	Broker of Record Health Benefits	\$101,000	July 1, 2022- June 30, 2023

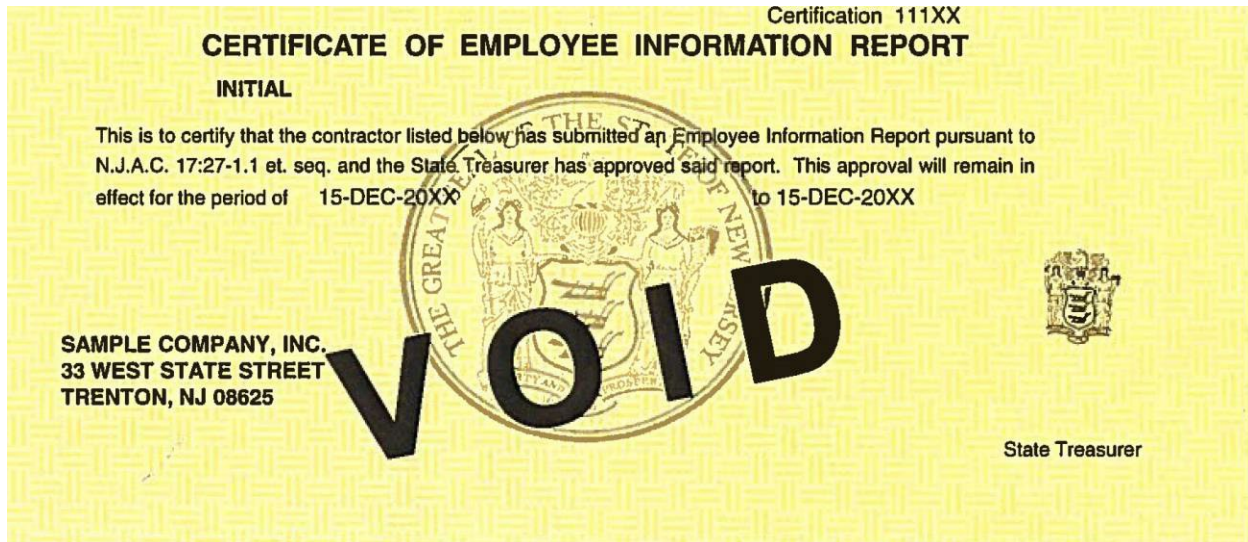
The resolutions and contracts are on file in the Business Office and are available for public inspection.

## Procurement Documents

Affirmative Action Evidence  
Certificate of Employee Information Report

**Goods, Services and Professional Services**

Prior to the execution of the contract, all vendors are to submit to the Board of Education Affirmative Action evidence. The most common evidence is the Certificate of Employee Information Report or also known as the Affirmative Action Certificate.



**Recommendation—Obtain Affirmative Action Evidence**

It is recommended that every effort be taken to receive Affirmative Action evidence from all vendors no matter what the amount of the contract. It has been my experience that Affirmative Action audits will include a review of all contracts exceeding the bid threshold, therefore it is recommended that all contracts awarded that exceed the bid threshold have AA evidence on file.

**Recommendation—Certificate Must Be Current—Expiration Date**

The Affirmative Action Certificate has an expiration date. It is the responsibility of the Board of Education to maintain on file a current Affirmative Action Certificate for all vendors.



**Recommendation—Monitor Affirmative Action Certificates**

The School Business Administrator/Board Secretary should set up a monitoring system of Affirmative Action Certificates to ensure they are current and have not expired. This can be done as follows:

- **Alphabetical Listing of AA Certificates**  
SBA's should maintain a file of current AA Certificates in alphabetical order.  
A large binder would be ideal!
- **List of AA Certificates in Order of Expiration**  
SBA's should maintain a file (Excel List) of all AA Certificates in order of expiration date with the most current expiration dates listed first. The SBA could easily identify those vendors whose AA Certificates are about to expire and send them a letter of notification.

New Jersey  
Business Registration Certificate

**New Jersey Business Registration Certificate Requirements**

**BRC Required—15% of Bid Threshold**

Pursuant to N.J.S.A. 52:32-44, a contractor (business organization) that seeks to enter into a contract with a board of education in an amount that exceeds fifteen (15%) percent of the bid threshold, shall submit to the board a valid and current New Jersey Business Registration Certificate. A business organization does not include a government agency or a nonprofit entity.

**Requirement Deadline of BRC Submission—Prior to Award of Contract**

A **contractor** shall provide the board of education with the business registration certificate of the contractor and that of any named subcontractor **prior to the time** a contract, purchase order, or other contracting document is awarded or authorized.

**Submission with Bid, Proposal, Quotation—Board May Request; Not Require**

A board of education may request; not require that a contractor submit their business registration certificate with a bid, proposal or quotation request. Boards of education are not permitted to reject bids, proposals or quotations submitted by contractors for failure of the contractor to submit the business registration certificate with the bid, proposal or quotation.

**Responsibilities of the Boards of Education**

1. Obtain the NJ Business Registration Certificate prior to the contract award.
2. Retain copies of the NJ Business Registration Certificate with the
  - Contract
  - Bid or proposal
3. Maintain a file of NJ BRCs in **alphabetical order**—N.J.S.A. 52:32-44 (c)
4. Due Diligence Process

NJ BRCs have no expiration date, however, it is incumbent upon the board of education to perform a due diligence check. It is therefore recommended that prior to signing a purchase order, the Purchasing Agent visit the **On-Line Business Registration Certificate Service of the NJ Division of Revenue and check the current status of each NJ BRC submitted.**

**Final Note: Geographical Borders of New Jersey**

The NJ BRC is required from a contractor, where the goods that are received, services that are delivered, and construction is constructed, are within the geographic borders of the State of New Jersey. Out of state contractors providing goods to be **delivered to New Jersey schools** or **providing services to and in New Jersey schools** shall submit the NJ BRC.

However!

If students or officials of NJ schools visit out-of-state contractors and use the contractor's goods and services out of state, then the NJ BRC is not required.


For example

- Conference lodging held in out-of-state hotels.
- Football or band camps held in out-of-state venues.
- Field trip admissions in out of state venues.

# Sample Business Registration Certificates

STATE OF NEW JERSEY BUSINESS REGISTRATION CERTIFICATE FOR STATE AGENCY AND CASINO SERVICE CONTRACTORS		DEPARTMENT OF TREASURY DIVISION OF REVENUE PO BOX 252 TRENTON, NJ 08646-0252
TAXPAYER NAME: TAX REGISTRATION TEST ACCOUNT	TRADE NAME: CLIENT REGISTRATION	
TAXPAYER IDENTIFICATION#: 970-097-382/500	SEQUENCE NUMBER: 0107230	
ADDRESS: 847 ROEBLING AVE TRENTON NJ 08611	ISSUANCE DATE: 07/14/04	
EFFECTIVE DATE: 01/01/01		
FORM-BRC(08-01)	Act. Director	

This Certificate is NOT assignable or transferable. It must be conspicuously displayed at above address.

STATE OF NEW JERSEY BUSINESS REGISTRATION CERTIFICATE	
	
<b>Taxpayer Name:</b>	TAX REG TEST ACCOUNT
<b>Trade Name:</b>	
<b>Address:</b>	847 ROEBLING AVE TRENTON, NJ 08611
<b>Certificate Number:</b>	1093907
<b>Date of Issuance:</b>	October 14, 2004
<b>For Office Use Only:</b>	
	20041014112823533

CHAPTER 271  
POLITICAL CONTRIBUTION DISCLOSURE FORM

Pay to Play

**Receipt of Chapter 271 Political Contribution Form**

The School Business Administrator/Board Secretary shall comply with N.J.S.A. 52:34-25

a. Not later than **10 days** prior to entering into any contract having an anticipated value in excess of **\$17,500**, except for a contract that is required by law to be publicly advertised for bids, a State agency, county, municipality, independent authority, board of education, or fire district shall require any business entity bidding thereon or negotiating therefore, to submit along with its bid or price quote, a list of political contributions as set forth in this subsection that are reportable by the recipient pursuant to the provisions of P.L.1973, c.83 (C.19:44A-1 et seq.) and that were made by the business entity during the preceding **12 month period**, along with the date and amount of each contribution and the name of the recipient of each contribution.

**Reviewing Chapter 271 Political Contribution Form--Award of Contract**

The School Business Administrator/Board Secretary shall comply with N.J.A.C. 6A:23A-6.3

N.J.A.C. 6A:23A-6.3 Contributions to district board of education members and contract awards  
No district board of education shall vote upon or award any contract in the amount of \$ 17,500 or greater to any business entity that has made a contribution reportable by the recipient under P.L. 1973, c. 83 (N.J.S.A. 19:44A-1 et seq.), to a member of the district board of education during the preceding one-year period.

Copies of the Chapter 271 Political Contribution Form shall be maintained with the purchase order or with the written formal contract.

DISCLOSURE  
INVESTMENT ACTIVITIES IN IRAN

**The School Business Administrator/Board Secretary shall comply with N.J.S.A. 18A:18A-49.4, and C.52:32-55 et al, as it pertains to submission and receipt of the Disclosure of Investment Activities in Iran Form.**

Pursuant to N.J.S.A. 52:32-57, et seq. (P.L. 2012, c.25 and P.L. 2021, c.4) any person or entity that submits a bid or proposal or otherwise proposes to enter into or renew a contract must certify that neither the person nor entity, nor any of its parents, subsidiaries, or affiliates, is identified on the New Jersey Department of the Treasury's Chapter 25 List as a person or entity engaged in investment activities in Iran. The Chapter 25 list is found on the Division's website at <https://www.state.nj.us/treasury/purchase/pdf/Chapter25List.pdf>. Vendors/Bidders must review this list prior to completing the below certification. If the Director of the Division of Purchase and Property finds a person or entity to be in violation of the law, s/he shall take action as may be appropriate and provided by law, rule or contract, including but not limited to, imposing sanctions, seeking compliance, recovering damages, declaring the party in default and seeking debarment or suspension of the party.

If the Board determines that a person or entity has submitted a false certification concerning its engagement in investment activities in Iran under section 4 of P.L.2012, c.25 (C.52:32-58), the board shall report to the New Jersey Attorney General the name of that person or entity, and the Attorney General shall determine whether to bring a civil action against the person to collect the penalty prescribed in paragraph (1) of subsection a. of section 5 of P.L.2012, c.25 (C.52:32-59).

In addition, bidders must provide a detailed, accurate and precise description of the activities of the bidding person/entity, or one of its parents, subsidiaries or affiliates, engaging in the investment activities in Iran outlined above by completing the boxes on the lower portion of the enclosed form.

The Board has provided within the specifications, a Disclosure of Investments Activities certification form for all persons or entities, that plan to submit a bid, respond to a proposal, or renew a contract with the board, to complete, sign and submit with the proposal.

**The Disclosure of Investment Activities in Iran Form is to be completed, certified and submitted prior to the award of the contract.**

**Procurement Documents—Contractors—Public Works Contracts**

It is highly recommended the following documents be on file with the board of education when using a cooperative purchasing vendor for public works contracts.

- Notice of Classification—public work exceeding \$20,000
- Total Amount of Uncompleted Contracts—public work exceeding \$20,000
- Contractor Registration Certificate—Public Work Exceeding \$2,000
- Affirmative Action Form AA-201—Send to Contractor
- Prevailing Wages Notification—Send to Contractor
- Insurance Certificate

**Purchases**

**Educational or Operational Value**

## **PURCHASE ORDER RATIONALE**

### **Educational or Operational Rationale**

The Board of Education firmly believes that all purchases should have an educational or operational value to the school district. At the discretion of the Superintendent of Schools and/or the School Business Administrator/Board Secretary, a Purchase Order Rationale Form may be required to explain the need for the purchase.

If this is the case, a Purchase Order Rationale form shall be attached to the top of each requisition/purchase order submitted (exceptions noted) to the Business Office. This form asks for a written explanation as to the educational or operational need for the purchase.

Administrators who submit purchase orders have to put in writing why the purchase is essential to the school district. Administrators who sign off on purchase orders will now have to provide explanations on the following:

- How students will learn or benefit from the purchase?
- What educational achievement or program may be linked to the purchase?
- How is the purchase of operational value to your school/office?
- Are the goods/services purchased useful for the long term rather than for immediate need?
- Have inventories been checked to determine whether there is a real need for the purchase?

Administrators will now have to justify the need for the purchase and if so required, explain the need at a Board of Education meeting.

The Purchase Order Rationale Form is to be submitted for all purchases with exceptions noted and shall be attached to the front of the purchase order (requisition form);

A detailed explanation of the educational or operational need is required for each form. The form is to be signed by the administrator or supervisor with an original signature (blue ink).

### Exceptions for Purchase Order Rationale Form

Purchase orders for the following items do not require a Purchase Order Rationale form:

#### **Emergency Purchases (N.J.S.A. 18A:18A-7)**

Emergency purchases are regulated by state law. In order to approve an emergency purchase, a rationale must be first provided thus negating the need for a purchase order rationale form.

#### **Field Trip Transportation**

Requisitions for field trip transportation do not need a rationale form. A copy of the Approved “Field Trips” Resolution must be attached to each field trip transportation purchase order.

#### **Pupil Transportation; Athletic Transportation**

Transportation of students to and from school is regulated by state law, administrative code and the student’s IEP and does not require a rationale form. Transportation of athletes to and from athletic events does not require a rationale form.

#### **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 have been met in order for the requisition to have been prepared.

#### **Tuition Contracts—Special Education Schools**

As with pupil transportation requisitions, tuition to special education schools is regulated by federal and state law and no further justification is needed.

#### **Tuition Reimbursement for Employees**

This employee contractual benefit needs no further explanation. All conditions and approvals for tuition reimbursement have been met in order for the purchase order to have been prepared.



**Board of Education Actions  
(Public School Purchasing)**

## **Board of Education Actions**

### **(Public School Purchasing)**

#### **Board of Education Actions--Purchasing**

The School Business Administrator/Board Secretary, in consultation with the Board Attorney, shall ensure the Board of Education is in compliance with all law, code and board policy when taking actions on items of public school purchasing. The Board of Education may adopt a resolution by a majority vote of those present and voting, except as otherwise noted by law.

#### **Authorization to Purchase—Sample Annual Resolution**

The Board of Education, pursuant to N.J.S.A. 18A:18A-3 (a), designates \_\_\_\_\_, School Business Administrator/Board Secretary, as the Qualified Purchasing Agent for the Board of Education and authorizes her/him to award contracts, in full accordance with the law, for purchases that do not exceed in the aggregate in a contract year the total sum of \$44,000.00 (bid threshold) without public advertising for bids. Furthermore, \_\_\_\_\_ is authorized to solicit competitive quotations pursuant to N.J.S.A. 18A:18A-37 (a) and to award contracts pursuant to N.J.S.A. 18A:18A-37 (c). In the absence or unavailability of the Purchasing Agent, the board hereby authorizes NAME OF PERSON, TITLE, to award contracts pursuant to N.J.S.A. 18A:18A-3 (a).

#### **Award of Contract – Lowest Responsible Bidder**

The Board of Education awards contracts to the lowest responsible bidder.  
N.J.S.A. 18A:18A-4 (a).

#### **Contracts Exceeding Bid Threshold**

Any contract that exceeds the bid threshold shall be awarded by board resolution even if they are exempt from bidding. N.J.S.A. 18A:18A-5

Exceptions:

- Purchase of textbooks, N.J.S.A. 18A:18A-4 (d)
- Emergency contracts awarded by the Purchasing Agent, N.J.S.A. 18A:18A-7
- Contracts exceeding the bid threshold awarded to State Contract vendors, after initial approval of the board of education. N.J.S.A. 18A:18A-10 (a) and N.J.A.C. 5:34-7.29 (c).

#### **Student Transportation Contracts**

##### *Lowest Responsible Bidder*

All student transportation contracts that exceed the bid threshold shall be awarded to the lowest responsible bidder. N.J.S.A. 18A:39-3 (a)

##### *Quoted Contracts*

Contracts for unanticipated transportation procured through the quotation process, shall be awarded by board resolution. N.J.A.C. 6A:27-9.12 (c).

#### **Competitive Contracting Process**

Contracts procured through the Competitive Contracting process are to be awarded by board resolution. N.J.S.A. 18A:18A-4.5 (d), (e)

#### **Professional Services Contract**

Any professional service contract that exceeds the bid threshold must be awarded by board resolution. Professional services contracts may not exceed 12 months.

N.J.S.A. 18A:18A-5 (a).

### **EUS Contracts for Insurance**

Although not required by law, it is strongly recommend, that all contracts less than the bid threshold, for Insurance or Insurance Broker of Record Services procured through the EUS process, be awarded by board resolution. All contracts more than the bid threshold shall be awarded by board resolution.

N.J.S.A. 18A:18A-5

### **Equal Prices**

If two or more vendors submit the same equal lowest price, then the Board must give a reason why they chose one vendor and not the other.

N.J.S.A. 18A:18A-37(d)

### **Renewal of Contracts -- Services Only**

Contracts for services other than professional services may be renewed by board resolution, as provided by law.

(N.J.S.A. 18A:18A-42)

### **Authorizations**

Board resolutions are required for the following:

- Initiate the Competitive Contracting process—N.J.S.A. 18A:18a-4.3 (a)
- Procurement of a Concession—N.J.A.C. 5:34-9.4 (a) (2)
- Authorizing Student Transportation bids—N.J.A.C. 6A:27-9.2 (c)

### **National Cooperative Contracts**

It is recommended that the board adopt the following resolutions pertaining to procuring goods and services from vendors who were awarded contracts through a national cooperative.

- Adopt a resolution for membership in the National Cooperative; and
- Adopt a resolution awarding the contract to the National Cooperative vendor.

### **State and Local Cooperative Contracts**

It is recommended that the board adopt the following resolutions pertaining to procuring goods and services from vendors who were awarded contracts through a state or local cooperative purchasing system.

- Adopt a resolution for membership in the cooperative; and
- Adopt a resolution awarding the contract to the Cooperative vendor.

### **Rejection of Individual Bids**

A board of education may reject individual bids (upon attorney guidance) for being non-responsive. N.J.S.A. 18A:18A-2 (y)

### **Rejection of All Bids**

A board of education may reject all bids (Competitive Contracting proposals) for any of the following reasons:

- a. The lowest bid substantially exceeds the cost estimates for the goods or services;

- b. The lowest bid substantially exceeds the board of education's appropriation for the goods or services;
- c. The board of education decides to abandon the project for provision or performance of the goods or services;
- d. The board of education wants to substantially revise the specifications for the goods or services;
- e. The purposes or provisions or both of N.J.S.18A:18A-1 et seq. are being violated; and
- f. The board of education decides to use the State authorized contract pursuant to N.J.S.A 18A:18A-10; N.J.S.A. 18A:18A-22

**Awarding Contracts—Less than Ten (10%) of State Contract**

A board of education may award a contract upon solicitation of three quotations for contracts issued by the State of New Jersey, to the vendor who submits the lowest quotation which is at least 10 % below the state contract price. Two-thirds (2/3) affirmative votes of authorized membership needed. N.J.S.A. 18A:18A-5 (e).

**Vehicles for Board Use**

Contracts for the purchase, lease or lease-purchase for any vehicle for board use shall be awarded by board resolution. A majority affirmative vote of the full membership of the board is required.

N.J.A.C. 6A:23A-6.12

**Approval of Change Orders—N.J.A.C. 5:30-11.1 et seq.**

The board of education shall approve all change orders pursuant to N.J.A.C 5:30-11.1 et seq.

**Approval of Negotiated Vendor Contracts**

A board of education may award negotiate and award a contract when on two occasions, no bids were received, or bids were determined not to be reasonable in price. Two-thirds (2/3) affirmative votes of authorized membership are needed.

N.J.S.A. 18A:18A-5 (c)

The School Business Administrator/Board Secretary shall confer with the Board Attorney on all voting matters.

## **Purchase of Textbooks**

## **Approval & Purchase of Textbooks**

### **Approval of Textbooks**

In accordance with state law (N.J.S.A. 18A:34-1), all textbooks must be approved by the Board of Education prior to their use in the educational program. Purchasing textbooks that have not been approved by the Board of Education is a violation of state law.

### **Definition of a Textbook-N.J.S.A. 18A:58-37.2 (c)—Principal Source of Study**

Textbook means books, workbooks or manuals, whether bound or in loose-leaf form, or electronic textbooks, including but not limited to, computer software, computer-assisted instruction, interactive videodisk, and other computer courseware and magnetic media, intended as a principal source of study material for a given class or group of students, a copy of which is available for the individual use of each pupil in such class or group. Computer software shall be prepared for educational programs which are subject- oriented and for student instruction.

### **Textbook Approval – Board of Education Resolution**

The procedure for obtaining Board approval is:

- a) Complete the District Textbook Evaluation and Approval form.
- b) Submit textbook and form to the Office of Curriculum and Staff Development, who will prepare the Board resolution.

### **Purchase of Textbooks and Curriculum Department Review**

New Jersey educational administrative code N.J.A.C. 6A:23A-9.3(c) (12) requires the purchase of textbooks to meet one of the following conditions:

1. The purchase is in accordance with a textbook replacement plan;
2. Textbooks have been identified as stolen or destroyed; or
3. A change in curriculum or new edition requires a new textbook.

It is important that all purchase orders for textbooks withstand any state or district audit review. The following documentation shall be attached to each purchase order for textbooks:

The School Business Administrator/Board Secretary will ensure that all textbooks purchased will comply with N.J.A.C. 6A:23A-9.3(c) (12)

### **Budget Accounts**

Only textbooks and teacher editions of the textbooks may be purchased from the “640” object code. All other books and reading material must be purchased from the “600” or “610” series accounts.

**Sales and Use Taxes**

## **Taxes and School Districts**

New Jersey local school districts are political subdivisions of the State of New Jersey. Their purchases, except purchases of energy, are exempt from New Jersey sales and use taxes, pursuant to Section 9(a)(1) of the New Jersey Sales and Use Tax Act. NJ Division of Taxation—TB-49

### **ST-5 Exempt Organization Certificates**

An exempt organization certificate or number is not required for the local school district, public school or board of education to make tax-exempt purchases. ST-5 Exempt Organization Certificates are never issued to New Jersey government entities, including public schools. Their official letterhead or official purchase order, signed by a school official, is sufficient proof to the vendor that they are exempt from paying sales taxes. Payment must be made by a school check, including a student activity fund check, or a school voucher.

The Board of Education shall not pay nor reimburse New Jersey Sales and Use Taxes in accordance with the law and guidance received from the New Jersey Division of Taxation.

### **Contractors and New Jersey Sales Taxes**

As a New Jersey governmental entity, the Board of Education is exempt from the requirements under New Jersey state sales and use tax (N.J.S.A. 54:32B-1 et seq.), and does not pay any sales or use taxes. Contractors should note that they are expected to comply with the provisions of said statute and the rules and regulations promulgated thereto to qualify them for examinations and reference to any and all labor, services, materials and supplies furnished to the Board of Education. Contractors may not use the Board's tax-exempt status to purchase supplies, materials, services or equipment.

A contractor may qualify for a New Jersey Sales Tax Exemption on the purchase of materials, supplies and services when these purchases are used exclusively to fulfill the terms and conditions of the contract with the Board of Education. All contractors are referred to New Jersey Division of Taxation—Tax Bulletin S&U-3 for guidance. Again, contractors are not permitted to use the Board's tax identification number to purchase supplies, materials, services or equipment.



## Acceptance of Gifts

## **Acceptance of Gifts**

Acceptance of gifts or scholarships from any individuals or groups in the community requires the approval of the Superintendent of Schools and/or Board of Education subject to Board Policy. Please note the following:

No gift or scholarship will be accepted, which in the opinion of the Superintendent is inappropriate for use by the schools.

The use and disposition of such gifts or scholarships will be handled in accordance with Board policy.

Gifts that require installation and/or maintenance costs will be accepted only upon approval by the Superintendent and the school Principal.

All gifts require final approval by the Board of Education

### **Gifts and Purchasing**

Payment from bequest, legacy or gift; conditions. N.J.S.A. 18A:18A-15.1

Goods or services, the payment for which utilizes only funds received by a board of education from a bequest, legacy or gift, shall be subject to the provisions of N.J.S.18A:18A-1 et seq., except that if such bequest, legacy or gift contains written instructions as to the specifications, manufacturer or vendor, or source of supply of the goods or services to be provided or performed, such instructions shall be honored.

**Payment from Bequest, Legacy or Gift**  
Guidance from the New Jersey Division of Local Government Services  
N.J.S.A. 40A:11-13.1 and N.J.S.A. 18A:18A-15.1

The requirement for the solicitation of quotations or the receipt of bids is based on whether the total contract amount for the purchase of the good(s) or service(s) is under or over the bid threshold, regardless of the dollar amount of the contracting unit's share.

**Payment from bequest, legacy or gift; conditions. N.J.S.A. 18A:18A-15.1**

Goods or services, the payment for which utilizes only funds received by a board of education from a bequest, legacy or gift, shall be subject to the provisions of N.J.S.18A:18A-1 et seq., except that if such bequest, legacy or gift contains written instructions as to the specifications, manufacturer or vendor, or source of supply of the goods or services to be provided or performed, such instructions shall be honored.

**Situation 1**

Donor makes a monetary donation directly to the board of education for a certain type of goods or services with specific written instructions as to the specifications, manufacturer or vendor, or the source of supply of the goods or service and the donation covers the total contract amount.

- No quotations or bids required.

**Situation 2**

Donor makes a monetary donation directly to the board of education for a certain type of goods or services but does not provide specific written instructions as to the specifications, manufacturer or vendor, or the source of supply of the goods or service and the donation covers the total contract amount

- If the total contract amount is less than the bid threshold, solicitation of two competitive quotations is required, if in excess of the bid threshold, the receipt of bids is required.

**Situation 3**

Donor makes a monetary donation directly to the board of education for a certain type of goods or services with specific written instructions as to the specifications, manufacturer or vendor, or the source of supply of the goods or service and the donation does not cover the total contract amount.

If the donation does not cover the total contract amount, thus requiring the board of education to provide public funds to complete the transaction, the following shall occur:

- If the donor's donation, plus the board's share can purchase the goods or services and the total amount of the contract is less than the bid threshold, solicitation of two competitive quotations is required.
- If the donor's donation, plus the board's share can purchase the goods or services and the total amount of the contract is in excess of the bid threshold, the receipt of bids is required.

**Situation 4**

Donor makes a monetary donation directly to a specific vendor of its choice for the purchase of certain types of goods or services and the donation covers the total contact amount.

- No quotations or bids required.

**Situation 5**

Donor makes a monetary donation directly to a specific vendor of its choice for the purchase of certain types of goods or services and the donation does not cover the total contact amount.

If the donation does not cover the total contract amount, thus requiring the board of education to provide public funds to complete the transaction, the following shall occur:

- If the donor's donation, plus the board's share can purchase the goods or services and the total amount of the contract is less than the bid threshold, solicitation of two competitive quotations is required.
- If the donor's donation, plus the board's share can purchase the goods or services and the total amount of the contract is in excess of the bid threshold, the receipt of bids is required.

**Guidance**

Board of education approval by resolution is required for all situations listed. The School Business Administrator/Board Secretary shall also adhere to other procurement law and code prior to recommending contracts for award.

## Contract Notification

### Office of the State Comptroller

The School Business Administrator/Board Secretary shall notify the Office of the State Comptroller for expenditures or contracts that exceed a certain dollar amount:

#### NOTIFICATION FOR CONTRACTS VALUED AT \$2.5 MILLION OR MORE

##### **Post-Award Notification for Contracts valued at more than \$2.5 million but less than \$12.5 million**

Contracting units must provide post-award notification for any contract for an amount exceeding \$2.5 million. Notification must be given within 20 days of the award. Please complete the form at the link below and email the form and applicable documents to **contracts@osc.nj.gov**

- Post-Award Notice for Contracts Valued At More Than \$2.5 million but Less Than \$12.5 million

#### NOTIFICATION FOR CONTRACTS VALUED AT \$12.5 MILLION OR MORE

##### **Pre-Award Notification**

In accordance with N.J.S.A 52:15C-10, contracting units must notify OSC as early as practicable, but no later than 30 days before advertisement, of any negotiation or solicitation of a contract that may exceed \$12.5 million. Please complete the form at the link below and email the form and applicable documents to **contracts@osc.nj.gov**

- Pre-Advertisement Notice for Contracts \$12.5 million or more

##### **Post-Award Notification**

Within 20 days after the award of a contract of \$12.5 million or more, please complete the form at the link below and email the form and applicable documents to **contracts@osc.nj.gov**

- Post-Award Notice for Contracts \$12.5million or more

## **Disposal/Sale of Personal Property**

### **Disposal/Sale of Personal Property**

School districts may dispose of personal property in accordance with State Law and their particular board policy. Depending on board policy personal property may also include instructional property, but in no case shall it include real property. **Real estate property** shall be disposed of by sale or otherwise, in accordance with the law.

#### **N.J.S.A. 18A:18A-45: Manner and method of sale.**

Any board of education may, by **resolution** and by sealed bid or public auction, authorize the sale of its personal property not needed for school purposes.

- a. If the **estimated fair value of the property** to be sold exceeds 15 percent of the bid threshold in any one sale and it is neither livestock nor perishable goods, it shall be sold at public sale to the highest bidder.
- b. Notice of the date, time and place of the public sale, together with a description of the items to be sold and the conditions of sale, shall be published once in an official newspaper. Such sale shall be held not less than seven nor more than 14 days after the publication of the notice thereof.
- c. Personal property may be sold to the United States, the State of New Jersey, another board of education, any body politic, any foreign nation which has diplomatic relations with the United States, or any governmental unit in these United States by private sale without advertising for bids.
- d. If no bids are received the property may then be sold at private sale without further publication or notice thereof, but in no event at less than the estimated fair value; or the board of education may if it so elect, reoffer the property at public sale. As used herein, "estimated fair value" means the market value of the property between a willing seller and a willing buyer less the cost to the board of education to continue storage or maintenance of any personal property not needed for school purposes to be sold pursuant to this section.
- e. A board of education may reject all bids if it determines such rejection to be in the public interest. In any case in which the board of education has rejected all bids, it may re-advertise such personal property for a subsequent public sale. If it elects to reject all bids at a second public sale, pursuant to this section, it may then sell such personal property without further publication or notice thereof at private sale, provided that in no event shall the negotiated price at private sale be less than the highest price of any bid rejected at the preceding two public sales and provided further that in no event shall the terms or conditions of sale be changed or amended.
- f. If the estimated fair value of the property to be sold does not exceed the applicable bid threshold established pursuant to subsection a. of this section in any one sale or is either livestock or perishable goods, it may be sold at private sale without advertising for bids.
- g. Notwithstanding the provisions of this section, by resolution of the board of education, a purchasing agent may include the sale of personal property no longer needed for school purposes as part of specifications to offset the price of a new purchase.

**Sale of Real Property (Real Estate)**

The sale of real property is explained in the following law and code.

- N.J.S.A. 18A:20-6: Public sale; advertisement; exception
- N.J.S.A. 18A:20-7: Sale at fixed minimum prices; rejection of bids
- N.J.A.C. 6A:26-7.4 Approval for the disposal of land, including rights or interest

It is highly recommended the board attorney is consulted on all sales of real property.



## Vendors

## **Vendors Doing Business with the District**

### **New Vendors**

The School Business Administrator/Board Secretary or designee must enter new vendor information in the Business Office financial system prior to using the services or goods of that new vendor. The School Business Administrator/Board Secretary also has to receive from vendors certain legal documents prior to issuing a purchase order. Depending on the amount of the purchase order in the aggregate the following documents must be in the possession of the School Business Administrator/Board Secretary:

- Affirmative Action Evidence—Certificate of Employee Information Report
- Business Registration Certificate from the State of New Jersey
- Chapter 271 Political Contribution Disclosure form
- Iran Financial Disclosure Form
- IRS W-9 Form
- Other documents required by Federal Procurement Code

### **Vendor Performance--Unsatisfactory**

It is hoped that vendors used by the school district provide goods and services in accordance with the terms and conditions of the contract. If any school official does not receive goods or services in a satisfactory manner, it is important that the Purchasing Agent be informed.

### **Vendor/Contractor Evaluation & Recommendation**

The Public School Contracts Law permits the school district to renew the contract of a vendor or contractor who provides services to the district. School officials administering the contract for those vendors shall, pursuant to N.J.S.A. 18A:18A-42, complete Vendor/Contractor Evaluation and Recommendation form to determine if the vendor has provided services to the district in an “effective and efficient manner.

### **Vendor Relations**

All district employees are to practice exemplary ethical behavior in the purchasing process. Employees are to avoid any action that may be considered a conflict with their position with the district and those dealings with vendors who provide goods and services to the district. All district employees should adhere to the following terms and conditions of the board’s policy on Ethics and Conduct in Purchasing; Vendor Relations.

### **Vendor Responsibility – Doing Business with the Board of Education**

Any vendor doing business or proposing to do business with the 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 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 Board of Education, in any manner which might tend to impair the objectivity or independence of judgment of said official or employee.

### **Vendor Certification**

Vendors will be asked to certify that no official or employee of the 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 Board of Education.

**Vendor Debarment, Suspension or Disqualification– (N.J.A.C. 17:19-1.1 et seq.)**

The Board of Education will not enter into a contract for work with any person, company or firm that is on the State Department of Labor and Workforce Development; Prevailing Wage Debarment List, or the State of New Jersey Consolidated Debarment Report ([www.state.nj.us/treasury/debarred](http://www.state.nj.us/treasury/debarred)) or the Federal System for Award—SAM.gov.

**Meals and Refreshments  
Non-Essential Purchases**

## MEALS and REFRESHMENTS

The State of New Jersey Department of Education has provided guidance to school districts through Administrative Code **N.J.A.C. 6A:23A-5.8** on Board expenditures for meals and refreshments.

The expenditure of public funds (purchase order) for meals and refreshments may be used for the following:

<b>Permitted Activities for Meals; Refreshments; Catering</b>
---

- **Student Activities**  
Reasonable costs for light meals and refreshments directly related to activities that benefit students and are part of the **instructional program** are permissible. These activities must be part of the instructional program and not solely for student entertainment.
- **Parent Activities**  
Reasonable costs\* for light meals and refreshments for parent activities are permissible. It is expected that expenditures for this purpose will be minimal and infrequent.
- **Dignitaries**  
Reasonable costs\* for light meals and refreshments for dignitaries as defined in State code, are permissible.
- **Board Member Meetings -- N.J.A.C. 6A:23A-7.12(f)**  
Light meals and refreshments\* are permitted for all board members and for employees who are required to attend a board of education meeting.

\*Please note that costs for light meals and refreshments are limited as follows:

Breakfast	\$ 7.00 per person
Lunch	\$ 10.00 per person
Dinner	\$ 15.00 per person

(NJ OMB Circular 20-04-OMB Section XI—Letter J)

### **Documentation Required—Light Meals and Refreshments**

Documentation must be provided to support expenditures for light meals and refreshments. The following information is to be provided on the Purchase Order:

- Description of the activity;
- Purpose/justification of the activity; goal; objectives;
- Make-up of the group receiving the meals; and
- Names of employees and board members included in the group.

**Prohibited** Activities for Meals and Refreshments

- **Athletic Activities—Feeding Guests**  
Light meals and refreshments served to **guests** at any athletic event, game or contest are not permitted.
- **Staff and Employees of the School District**  
Light meals and refreshments are not permitted for employees and staff of a school district unless the staff member or employee is essential to **a student activity** where light meals or refreshments are being served. N.J.A.C. 6A:23A-7.12 (d); 6A:23A-5.8 (b) (4)
- **Honoring Employees**  
Receptions, dinners or other social functions held for or honoring any employee or group of employees are not permitted when public funds are being used.  
Please note: the use of public funds (purchase order) for the purchase of employee recognition awards is permitted. For example—Retirement Plaques!

## **Miscellaneous Purchasing Provisions**

### **Cancellation of Purchase Orders--Guidance**

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

### **Credit Cards Prohibited**

Pursuant to the New Jersey Department of Education Audit Program page I-5.9, a school district is not permitted to use a credit card for the purchase of goods and services. All purchases are to go through the purchase order process in compliance with the Public School Contracts Law.

### **Contracts; Purchase Order Required--Guidance**

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. N.J.S.A. 18A:18A-2 (v).

### **Employees Prohibited from Signing Contracts--Prohibition**

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

The power to sign and execute vendor contracts after Board of Education approval lies with the Board President and the School Business Administrator/Board Secretary.

### **Employee Reimbursements**

The Board only recognizes an employee reimbursement purchase order when it pertains to pre-approved travel, meals, and conferences. The Board will not reimburse employees for items and goods personally purchased by the employee. Wherever possible, purchase orders will be used for conferences and related expenses. When a vendor will not accept a purchase order, we investigate the option of hand-carrying a check. If that is not acceptable, then the employee may pay for the conference and be reimbursed only with the approval in advance.

### **Increasing a Purchase Order Amount**

There may be times when a purchase order amount has to be increased to meet the needs of the district. The School Business Administrator/Board Secretary, in accordance with N.J.A.C. 6A:23A-6.10, will identify and investigate the reason(s) for any increase to a purchase order. An appropriate form to request an increase has been prepared and is available from the Business Office. All requests to increase the amount of a purchase order must be approved by the School Business Administrator.

### **Personal Liability**

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

### **Preview of Materials**

All staff members must receive permission from administrators, supervisors, or principals to preview materials. After completing the preview process a determination will be made to keep or return the materials if there is a desire to purchase the previewed item, then a purchase order must be prepared and approved by all levels of the authorization process before the preview time expires.

**Private Purchases -- Prohibited**

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

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

**Purchase Order Cut Off Dates**

Administrators are to be alerted to the fact that purchase orders for the present school year will not be accepted after **March 1**. A list of the current Bill List Cutoff Dates is mailed directly to budget managers and secretaries. Please contact the Purchasing Department with any questions.



## **Requisition & Purchase Order Process**

### **Roles and Responsibilities**

## Requisition & Purchase Order Process

### A. Responsibilities When Preparing a Requisition

The person who prepares the 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. **Requisition Preparation** -- All requisitions are entered into the district requisition system.
2. **Vendor's Name**--All Board checks are made payable to the vendor name (top line) listed on the purchase order/requisition. Please ensure the proper vendor name is printed on the requisition.
3. **Vendor's Complete Address** -- The purchase order 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 body of the Purchase Order/Requisition.
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 catalog numbers/ISBN and costs. Brand name, model numbers, colors, sizes and other descriptive items are required.
6. **Shipping Costs**--Shipping and handling costs are to be added to all purchase orders. Please read the catalog 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 requisition/purchase order:

**“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 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, set up, and assemble items to determine good working order and remove all debris to the satisfaction of the Board of Education within five

(5) working days. Please ensure that all purchase orders have the correct delivery designation.

9. **Total Cost** -- Please include the words "Total Cost" on the purchase order with the actual amount of the order. Minimum Order -- the minimum order amount for all purchase orders is \$50.00. Please try to plan and combine orders to exceed the \$50.00 limit.
10. **Budget Account Number** -- Please be sure the correct Budget Account Number is typed on the requisition.
11. **State Contract Orders** -- When ordering through State Contract vendors (minimum order \$100.00), please note the following:
  - a. State Contract Number must be included on the requisition;
  - b. **1NJCP** must be included on all State Contract requisitions and purchase orders;
  - c. Shipping and Handling Included; and
  - d. Appropriate documentation when required.

Special guidance will be issued as it pertains to State Contract purchases.  
A reminder, the minimum order amount for a State Contract purchase is \$100.00

12. **Quotations** -- If quotations are obtained, please attach to the purchase order a copy of each written quotation received. Please type the quotation date and the quotation number.
13. **Bids** -- If bids are obtained, please include the following on the requisition:
  - a. Bid Date; and
  - b. Bid Number.

## **B. Responsibilities of Administrator/Supervisor or Principal**

The person authorized to approve requisitions must ensure the following is reviewed before the requisition is sent to the Assistant Superintendent/Superintendent:

1. **Funds Available**  
They must check to determine if *funds are available* in their budget to cover the amount of the purchase order.
2. **Requisition Completion**  
They must check to determine that items 1-13 previously noted (Responsibilities of the Originator) have been *properly completed*.
3. **Operational or Educational Need for Purchase**  
Administrators who approve requisitions should be able to explain why the purchase is essential to the school district. They should be able to support the purchase as an educational or operational need for the district. Of most importance they should be able to answer the following:
  - a. How students will learn or benefit from the purchase?
  - b. What educational achievement or program may be linked to the purchase?
  - c. How is the purchase of operational value to your school/office?

4. **Requisitions** are to be approved online by the appropriate administrator.
5. **Approval of Principal**  
Central office administrators and supervisors have been notified that whenever they order equipment for the instructional staff of the various schools, the purchase order must be made in consultation with the school principal. The principal must co-sign the purchase order for equipment purchases. It is the responsibility of the central office administrator/supervisor to obtain the signature of the principal.
6. **Originator Copy**  
The originator copy of the purchase order remains in the office of the administrator/supervisor/principal. When preparing a requisition, please retain a copy for your files.
7. **Receiving Copy**  
Once the purchase order has been posted and mailed to the vendor, the Business Office will send the Receiving Copy of the purchase order back to the school or office. If you do not receive the Receiving Copy within two (2) weeks of signing the purchase order, please contact the Business Office.

**C. Responsibilities of the Assistant Superintendent/Superintendent of Schools**

The Superintendent or the Assistant Superintendent reviews and determines the educational or operational value of each purchase order. If satisfied, the requisition is approved and forwarded to the Purchasing Agent.

**D. Responsibilities of Business Office**

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

1. **Available Funds**—The Requisition system will not permit a requisition to be finalized if there are insufficient funds in the account. If preparing PO, be sure to check for funds availability.
2. **What is being ordered and the cost**--The Purchasing Agent reviews the technical aspects of the purchase order to ensure compliance with Federal and State Law and Board Policy.

The Business Office checks the cost of each item and determines if it can be purchased from another source at a saving. The Business Office also reviews whether the purchase exceeds:

The Quotation Limit	<b>\$ 6,600.00</b>
The Bid Limit	<b>\$44,000.00</b>

A determination will be made by the Purchasing Agent whether the district has to solicit quotations or advertise for bid.

3. **Document Check**  
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 \$44,000.00 and over (cumulative)
- Business Registration Certificate (BRC) – Purchases \$6,600.00 and over
- Chapter 271 – Political Contribution Disclosure Form (PCD)  
Purchases over \$17,500.00 (cumulative)
- Iran Financial Disclosure Form
- IRS W-9 Form
- Other Federal Procurement Documents.

4. **Technical Review of Purchase Order** -- The purchase order is also reviewed for technical aspects such as:
- a. Account number missing or incorrect;
  - b. Shipping charges added;
  - c. Signatures missing;
  - d. State contract numbers incorrect/missing;
  - e. Vendor address incomplete; and
  - f. Other items as listed in Section A.

Incomplete or improper purchase orders/requisitions will be returned with a memo explaining deficiencies. See copy of memo in Appendix.

If the Purchasing Agent is satisfied, he signs the purchase order and/or approves the requisition. The Business Office will then:

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

**Purchase Order Process--Deliberative Process—Five to Ten Days**

The purchase order process, as explained, may take 5 – 10 days to complete. Public school purchasing takes time, as it is a deliberative process, designed to be in compliance with law and also to limit fraudulent activities. Please plan accordingly.

5. **Transfer of Funds**--The Business Office processes purchase orders only if there are appropriate funds to cover the purchase. Purchase orders lacking sufficient funds are sent back to the originator for a request to transfer funds. All requests for the transfer of funds are to be submitted in the district’s financial software and are subject to the approval of district’s Accountant and **School Business Administrator/Board Secretary (minimum)**.

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

In certain cases, some transfer of funds requests must be sent to the State Department of Education for review. Substantive transfers of money (more than 10% of the budget line item) must be approved by the State. Purchase orders that require a transfer of funds will be mailed to the vendors the day after the State Department of Education approves the transfers.

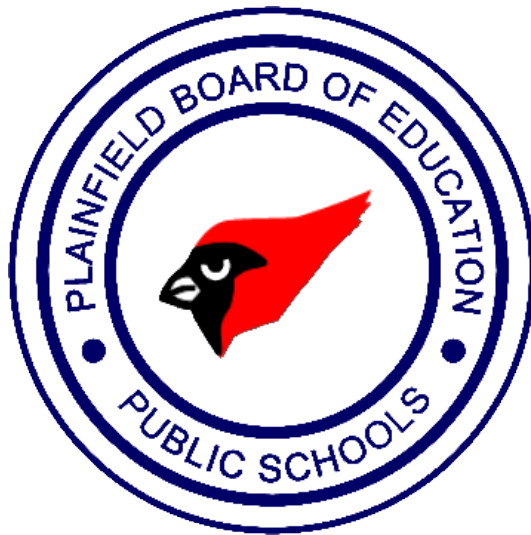
### **E. Responsibility of the Vendor**

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 (Pink) Signed

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.



# **PLAINFIELD BOARD OF EDUCATION**

## **Standard Operating Procedures**

### **TRAVEL 2023**

**Rashon K. Hasan**  
**Superintendent**

**Mark A. Williams**  
**Deputy Superintendent**

**Cameron E. Cox**  
**School Business Administrator**

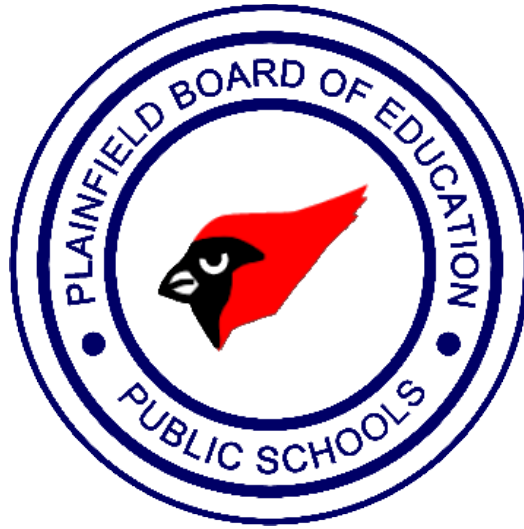


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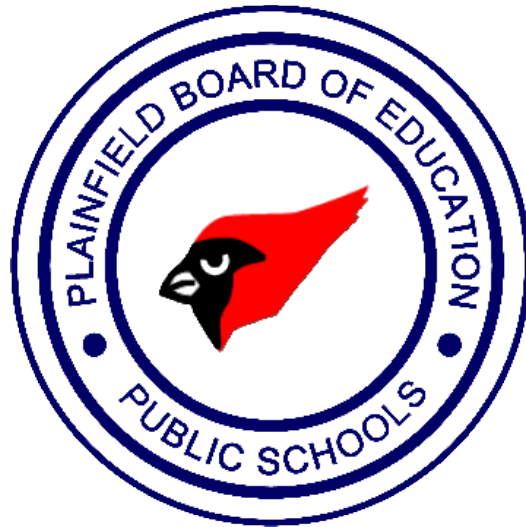
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## **DISTRICT TRAVEL**

The State of New Jersey, pursuant to N.J.S.A. 18A:11-12, has adopted strict travel guidelines for school districts to follow. All school officials and employees seeking permission to attend travel event or receive travel reimbursement must adhere to the law and travel administrative code—N.J.A.C. 6A:23A-7.1 et seq. The district has prepared the following travel standard operating procedures in full compliance with law, code and Board Policy Number 9250.

The district provides standard operating procedures for School Business Travel and Conference Travel events.

# School Business Travel

## Administrative Rules

The Administrative Rules for School Business Travel have been reviewed and approved by the Superintendent or Designee of Schools. These rules pertain to employees who are authorized to receive reimbursement for using their personal vehicles to travel to various events while conducting board business or to attend regularly scheduled events.

### A. RECOGNIZED TYPES OF SCHOOL BUSINESS TRAVEL

#### 1. Visitations

This business travel requires the employee to use his/her personal vehicle for the following out-of-district visits to conduct school business:

- Department of Education offices, e.g., Trenton, Newark;
- Other school districts, e.g., Child Study Team, Official Capacity Visits;
- Local, County, State, and Federal Offices; and
- Court visits out of the district, e.g., Jersey City

Employees seeking to be reimbursed for using their personal vehicles for this travel must complete the request form and obtain the Superintendent or Designee's permission **prior** to the travel.

#### 2. Attendance at Regularly Scheduled Events

- Attendance at regularly scheduled county meetings.
- Professional association regularly sponsored events – In-State – No Costs.
- Department of Education sponsored events – In-State – No Costs; and
- Professional development activities – Regular School District Business travel also includes regularly scheduled in-state professional development activities with a registration fee that does not exceed \$150.00 per employee or board member.

Employees seeking to be reimbursed for using their personal vehicles for this travel must complete the request form and obtain the Superintendent or Designee's permission **prior** to the travel. *Ref. N.J.A.C. 6A:23A-7.3(b) (3)*

#### 3. Explanation of School Business Travel -- \$150.00 Registration Fee

- Department of Education Events—DOE  
The Department of Education (DOE) sponsors a number of regularly scheduled professional development activities that involve registration costs. A registration fee for DOE event that does not exceed \$150.00 per individual is considered School Business Travel.

# School Business Travel

## Administrative Rules

### **B. ANNUAL MAXIMUM TRAVEL AMOUNT – PER EMPLOYEE-- \$1,500.00 LIMIT (WITHIN THE STATE OF NJ)**

Pursuant to N.J.A.C. 6A:23A-7.3(b) (1), the Board of Education, by resolution, authorizes an annual maximum amount per employee for regular business travel not to exceed \$1,500.00. Any additional travel amount beyond the maximum amount requires Board of Education approval.

Employees are notified that they are to carefully monitor their costs for School Business Travel costs to ensure it does not exceed the \$1,500.00 per employee maximum.

### **C. SCHOOL BUSINESS TRAVEL PROCEDURES**

#### **1. Approval Process**

##### School Business Travel Form

All employees requesting to be absent from school duties are to complete the form.

##### ***Request for School Business Travel***

and submit the form to the Office of the Superintendent or Designee at least ten (10) days prior to the travel.

Approval from the Superintendent or Designee is required prior to travel. *Ref. N.J.A.C. 6A:23A-7.3(b) (3)*

#### **2. Attachments to Request Form**

##### Justification Statement

Employee shall provide a brief statement that includes the primary purpose of the travel and the key issues that will be addressed at the event. (Not required for visitations.) *Ref. N.J.A.C. 6A:23A -7.5(b)(4)*

### **D. TRAVEL ACTIVITIES –SCHOOL BUSINESS TRAVEL**

#### **1. Activity Registration – Purchase Order**

Registration for professional development activities shall be made by preparing a purchase order for the vendor. Purchase orders should be prepared well in advance for the vendor to receive the registration.

##### Pre-Payment of Registration

Some professional associations require the registration to be pre-paid. If this is the case then a Request for Vendor Check form shall be completed and attached to the purchase order and submitted to the Superintendent or Designee before the purchase order deadline.

# School Business Travel

## Administrative Rules

### 2. Activity Registration – Purchase Order Cont'd

*Please note: IMPORTANT!* – Purchase Order Attachments

No purchase orders will be signed or processed unless the following is attached:

- Approval of Superintendent or Designee ([Request for School Business Travel Form](#));
- Copy of the Registration Form

### 3. Automobile Vehicles

Use of a school district-owned or leased vehicle shall be the first means of ground transportation. Use of a personally owned vehicle on a mileage basis shall not be permitted for official business where a school district-owned or leased vehicle is available.

- [Mileage](#)
- [Mileage Rate](#) – Annual NJ State Appropriations Act

Mileage allowance in lieu of actual expenses of transportation shall be allowed at the rate authorized by the annual New Jersey State Appropriations Act, or a lesser rate at the board's discretion for an employee or board member traveling by his personally owned vehicle on official business. *Ref. N.J.A.C. 6A:23A-7.9(c)(4i)*

*Currently, the mileage reimbursement is \$0.35 per mile.*

In accordance with the OMB circular, if any condition in an existing negotiated contract is in conflict with the circular, such as the mileage reimbursement rate, the provision of the contract will prevail.

Parking and toll charges shall be allowed in addition to the mileage allowance.

- [Travel Mileage Commute Deduction Worksheet](#)

All persons using their personal vehicle on board approved travel shall complete the district's Travel – Mileage Commuter Deduction Worksheet wherein pursuant to NJ Circular 20-04 OMB Section VIII H-4 normal commutation expense must be deducted when calculating mileage allowance.

All employees using privately owned vehicles in the performance of their duties for the school district shall present a New Jersey Insurance Identification Card indicating that insurance coverage is in full force and

# School Business Travel

## Administrative Rules

- Insurance Identification Card – Required Submission – With Request Form effect with companies approved by the State Department of Banking and Insurance. The card shall be made available to the Superintendent or Designee before authorization to use privately-owned cars. *Ref. N.J.A.C. 6A:23A-7.9(c) (4) (v)*

Employees who are out-of-state residents must provide appropriate insurance identification in lieu of the New Jersey Insurance Identification Card.

- Vehicle Registration – Required Submission – With Reimbursement Purchase Order

All individuals using personal vehicles on a travel event must submit a copy of the vehicle registration with the purchase order for travel reimbursement. *Ref. N.J.A.C. 6A:23A-7.13(e) (9)*

All travel by automobile must be done by the most direct, economical, and usually traveled route. Travel miles will be the actual mileage traveled. The Business Office will use [www.mapquest.com](http://www.mapquest.com) as a verifying guide, if necessary.

- Carpooling  
The Board encourages the use of carpooling for economic and environmental reasons. The Board will only reimburse the employee/owner of the vehicle being used. New Jersey Insurance Certificate and Vehicle Registration copies are required.
- Tolls  
Reimbursement will be provided for the cost of all tolls. Every effort should be made to obtain receipts. EZ Pass documentation is acceptable.
- Parking Costs  
Reimbursement will be provided for the cost of all reasonable parking costs. A receipt for parking payment is required for reimbursement.

*Please Note:* One-day Trips – Meals -- Not Reimbursable  
One-day trips are not eligible for any meal and incidental travel expense reimbursement.

# School Business Travel

## Administrative Rules

### **E. REIMBURSEMENT PROCEDURES – SCHOOL BUSINESS TRAVEL**

#### **1. Travel Reimbursement Expense Voucher**

The travel reimbursement voucher shall be completed by the employee to document the details of the travel event. The voucher must be signed by the employee to certify the validity of the charges for which reimbursement is sought. The form must also bear the signatures of approval officials for processing.

A Travel Reimbursement Voucher form for multiple travel events is available.

## Items Required for Travel Reimbursement

- Quote from “Orbitz” reflecting airfares. The date of the quote from Orbitz must be the same date as your airline ticket purchase, or reimbursement cannot be made. If taking the train (Amtrak), Acela service is not permitted.
- Taxi/Ubers are reimbursable only for reasonable instances, i.e. to/from conferences/dinner, please note that sightseeing, shopping, zoo, etc. are **not** reimbursable.”
- Hotel reservations are **not** to be made thru Hotels.com or other websites. They are to be made directly with the hotel.
- **Original** airline/train boarding passes/tickets.
- **Original** receipts for all meal purchases showing details of items ordered. Credit card charge slips are not acceptable.
- Please obtain separate receipts for Employee/Board Members as a singular charge, i.e., dining.
- **Original** receipt from hotel reflecting all charges and payments.
- **Additional Airline Fees** (i.e., early boarding, additional leg-room, overweight baggage, Travel Insurance, etc.) will not be reimbursed by the Plainfield Board of Education.
- Please review the **Per Diem Rates** for your travel. Meals will be reimbursed according to the guidelines.
- Summary report must be submitted indicating the purpose and importance of the trip.
- The Board must approve all reimbursements for travel on the Bills List at a public board meeting.
- All required documentation must be submitted and approved by the 5<sup>th</sup> of the month to be added to the Bills List for Board approval.
- No travel reimbursement will be made to employees without being on the Bills List.

I have read and understand the above-noted travel requirements. I further understand that reimbursements will not be made for items that do not comply with the above.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

# School Business Travel

## Documentation Required – Expenditures

- a. Transportation – Personal Vehicle
  - Actual mileage traveled; dates traveled – attach one of the following:
    - \*MapQuest
    - \*Google Maps
  - Travel Mileage Commute Deduction Worksheet
  - Insurance Identification Card
  - Vehicle Registration
- b. Tolls -- Toll receipts or EZ Pass documentation whenever possible.
- c. Parking -- Receipt required.

## 1. Documentation Required – Other

- a. Purchase Order
- b. Travel Request Form – copy
- c. Copy of Travel Report, Professional Development travel N.J.S.A. 18A:11-12 (d)

## 2. Miscellaneous Provisions

### Attachments to Purchase Order

All required documents shall be attached to the purchase order requesting reimbursement.

### Receipts

Actual and original receipts are required. Credit card statements shall not be accepted as documentation of expenses.

### Reimbursement Payment

The School Business Administrator shall not approve or issue payment until all required documentation and information have been submitted and verified.

### **Deadline to Submit Reimbursement – June 30<sup>th</sup> Deadline**

All outstanding travel vouchers for the school year ending June 30th shall be submitted as soon as possible after June 30th regardless of the amount, notwithstanding. *N.J.A.C. 6A:23A-7.13(f)*



# School Business Travel

## F. TRAVEL VIOLATIONS—MONITORING/COMPLIANCE

All travel will be monitored to ensure compliance as follows:

### Office of the Superintendent or Designee

The Office of the Superintendent or Designee shall review all requests for travel to ensure compliance with the law, code, policy and administrative rules. Any employee who violates the law, code, policy or rules shall be subject to the penalties assigned in N.J.S.A. 18A:11-12 (s).

### Office of the School Business Administrator

The Office of the School Business Administrator shall review all requests for travel reimbursement to ensure compliance with the law, code, policy and administrative rules in accordance with N.J.A.C. 6A:23A-7.6 (c).

### Board of Education

If on occasion, there is a Board of Education member who violates the school district's travel policy, law, or code, it shall be reported to the full Board of Education, who shall by board resolution, initiate sanctions outlined in N.J.A.C. 6A:23A-7.7(c) against said Board Members.

## G. SANCTIONS FOR VIOLATIONS OF TRAVEL REQUIREMENTS

### Maximum Travel Violations

Any board that violates its established maximum travel expenditure as set forth in N.J.A.C. 6A:23A-7.3 above, or that otherwise is not compliance with the travel limitations set forth in this section may be subject to sanctions by the Commissioner as authorized pursuant to N.J.S.A. 18A:4-23 and N.J.S.A. 18A:4-24, including reduction of State aid in an amount equal to any excess expenditure pursuant to N.J.S.A. 18A:11-12 and N.J.S.A. 18A:7F-60.

### Travel Approval Violations; Approval Authority – Superintendent or Designee of Schools

A person who approves any travel request or reimbursement in violation of the district's policy or these rules shall be required to reimburse the school district in an amount equal to three (3) times the cost associated with attending the event pursuant to N.J.S.A. 18A:11-12 (s). In accordance with N.J.A.C. 6A:23A-7.7(b)(1) the approval authority for travel to the District is the Superintendent or Designee. In case of the absence of the Superintendent or Designee, the alternate approval authority to approve travel requests is the Superintendent or Designee of Schools. *Ref. N.J.A.C. 6A:23A-7.4(a)(1)*

They shall be subject to all penalties as outlined in this section.

# School Business Travel

## Travel Reimbursement Approval Authority – School Business Administrator

The School Business Administrator (SBA) is designated as the travel reimbursement approval authority. The SBA shall review and approve all requests for travel expenditure reimbursements pursuant to N.J.A.C. 6A:23A-7.6(c) and shall be subject to all penalties as outlined in N.J.A.C. 6A:23A-7.7(b).

## Travel Violations - Employees

An employee or board member who violates the school district's travel policy or these rules shall be required to reimburse the school district in an amount equal to three (3) times the cost associated with attending the event pursuant to N.J.S.A. 18A:11-12. *Ref. N.J.S.A. 18A:11-12(s), N.J.A.C. 6A:23A-7.7(c)*

## Violations of Administrative Code – Loss of State Aid

Any Board of Education that violates its established maximum travel expenditure or that otherwise is not in compliance with the travel limitations set forth in this section may be subject to sanctions by the Commissioner including reduction of State aid in an amount equal to any excess expenditure. *Ref. N.J.S.A. 18A:11-12(r)*

# **School Business Travel**

## **Travel Expense Voucher**

The attached Travel Reimbursement Voucher is to be completed and attached to the purchase order for a reimbursement of travel expenses.

The Superintendent or Designee's signature is required prior to submitting to the Business Office.

The School Business Administrator will sign upon verification of receipts and documents.

## **TRAVEL REIMBURSEMENT VOUCHER**

***This form must be submitted within 10 days following board/employee's return from the workshop/conference.***  
***Please print and attach the original receipts.***

Name \_\_\_\_\_

Position \_\_\_\_\_

Street \_\_\_\_\_

Budget Line \_\_\_\_\_

City/State/Zip Code \_\_\_\_\_

Received by: \_\_\_\_\_

Title of Workshop/Conference \_\_\_\_\_

DATE	HOTEL/TRAVEL COSTS				MEAL COSTS*			TRANSPORTATION (airfare/train)	TOTAL AMOUNT
	HOTEL	MILEAGE	TOLLS	TAXI	BREAKFAST	LUNCH	DINNER		
								<b>GRAND TOTAL</b>	

*\*Mileage from school or home, whichever is the shorter distance.*

**BOARD/EMPLOYEE'S CERTIFICATION**

I certify that the above expenses were incurred on behalf of the Board. I have submitted Travel Report and/or Board Training Report.  
 I also certify that the above expenses are correct in all respects. The dates therein specified, and the amounts charged have been actually paid for traveling expenses. Original itemized receipts are attached.

Board/Employee's Signature \_\_\_\_\_

Date \_\_\_\_\_

Supervisor's Signature \_\_\_\_\_

Date \_\_\_\_\_

Special Projects Office 5/2002

Revised 3/2006

**PLAINFIELD BOARD OF EDUCATION**

**Mileage Form**

			TRAVEL COSTS			MEAL COSTS*			OTHER	TOTAL AMOUNT
			Mileage* as per IRS Allotment			*Meal costs only apply to meals consumed while attending workshop/conference/meeting.			e.g. Comments	
From	TO	Date			One way	Two way trip	Rate			
			-			0	0.35		-	
			-			0	0.35		-	
			-			0	0.35		-	
			-			0	0.35		-	
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			-			0	0.35		-	

Employee Signature \_\_\_\_\_  
 Signature of Administrator \_\_\_\_\_

# **School Business Travel**

## **Reimbursement Checklist**

The attached Travel Reimbursement Checklist is to be used as a guideline for those individuals that are seeking to be reimbursed for any approved travel.

The Reimbursement checklist is to be attached to the purchase order.

## Travel Reimbursement Checklist

The following items must be attached to all purchase orders for School Business Travel reimbursement. The School Business Administrator shall not approve or issue payment until all required documentation and information have been submitted and verified.

A.	<p><b>Purchase Order</b> The purchase order for reimbursement shall be duly signed by the School Business Administrator.</p>
B.	<p><b>Travel Request Form – Copy</b> The Travel Request Form shall be completed and signed noting prior approval dates. Attached must be a copy of the agenda of the travel event.</p>
C.	<p><b>Travel Voucher Form – Original</b> The Travel Voucher Form submitted shall document all expenses and be signed with the original signatures of the employee. The School Business Administrator and Supervisor shall sign the document upon review of all expenditures.</p>
D.	<p><b>Envelope -- Receipts</b> All original receipts with date and time of expense incurred shall be placed in an envelope and attached to the Travel Voucher.</p>
E.	<p><b>Copy of Travel Report</b> All persons authorized to travel shall prepare and submit a brief report explaining the travel event. A copy of the travel report shall be submitted with the purchase order for reimbursement. (Not required for visitations)</p>
F.	<p><b>Personal Vehicle Documentation (If applicable)</b> Copy of the Vehicle Registration Copy of the Insurance Identification Card</p>
G.	<p><b>Travel Mileage Commute Deduction Worksheet</b></p>
H.	<p><b>Miles Traveled – Supporting Documentation</b> – attach one of the following:</p> <ul style="list-style-type: none"> <li>• Map Quest</li> <li>• Google Maps</li> </ul>

# **School Business Travel**

## **Return of Purchase Order Reimbursement of Travel Expenses**

The attached Return of Purchase Order form is used by the Business Office to inform the person who submitted a purchase order for travel reimbursement that there were some deficiencies in the paperwork.

The employee has to make all adjustments as noted on the form before any reimbursement can be considered.



**Return of Purchase Order(s) – Reimbursement of Travel Expenses – SCHOOL  
BUSINESS TRAVEL**

TO: \_\_\_\_\_

FROM: \_\_\_\_\_,

DATE: \_\_\_\_\_

RE: **Return of Purchase Order(s) – Reimbursement of Travel  
Expenses –  
Items Not Submitted**

\_\_\_\_\_ **Transportation** – Personal Vehicle

\_\_\_\_\_ Actual Miles Traveled/Dates of Travel – Attach one of the following:

\*Map Quest

\*Google Maps

\*Yahoo Maps

\_\_\_\_\_ Mileage Rate – Incorrect Rate \_\_\_\_\_ per mile

\_\_\_\_\_ Mileage Commute Deduction Worksheet

\_\_\_\_\_ Insurance Identification Card

\_\_\_\_\_ Vehicle Registration

\_\_\_\_\_ Parking Receipts

\_\_\_\_\_ **Travel Voucher Form**

\_\_\_\_\_ Signatures Missing

\_\_\_\_\_ Form Not Attached

\_\_\_\_\_ **Travel Report** – Not Attached

\_\_\_\_\_ **Other**

---

Please submit all items with the form attached to the Business Office.

# **School Business Travel**

## **Mileage Form Deduction Worksheet**

### **TRAVEL**

### **Conferences**

### **Administrative Rules**

# Travel Conferences

## Administrative Rules

The Administrative Rules for travel have been approved and comply with:

- N.J.S.A. 18A:11-12 et seq.
- N.J.A.C. 6A:23A-5.9, 6.13, and 7.1 et seq.
- Commissioner's Regulatory Letter – March 17, 2008
- NJ Department of Treasury Circular 20-04 OMB, 11-09 OMB
- Federal OMB Circular A-87
- Board Policy 9250 <https://go.boarddocs.com/nj/plainfield/Board.nsf/vpublic?open#>
- Travel Guidelines—January 1, 2009—NJ DOE

These rules pertain to employee travel, board member travel and the types of travel listed below.

- Types of Travel
  1. Training/Seminars/Workshops
  2. Conventions and Conferences
  3. Retreats
  4. School District Sponsored Events

### Other Types of Travel

- Regular School District Business Travel
- Travel Allowance

- Regular School District Business Travel -- Separate Administrative Rules

The Board of Education, in conjunction with the Superintendent or Designee of Schools, recognizes certain regular school district business travel that occurs within the normal operation of the district. A separate set of administrative rules for regular school district business travel will govern the travel.

- Travel Allowance – Separate Administrative Rules

Travel allowance is a defined payment amount made through the payroll process to an authorized employee for using his/her vehicle while traveling on school district business. A separate set of administrative rules for travel allowance has been prepared.

# Travel Conferences

## Procedures Attendance at Conference

### A. REQUEST TO ATTEND CONFERENCE – COMPLETE REQUEST FORM

All employees requesting to attend a conference must complete and submit the Request for Attendance at Conference Form to the Office of the Superintendent or Designee.

The Superintendent or Designee will review the request to determine whether the travel is: Reference N.J.S.A. 18A:11-12 (c) (1) (2)

- Educationally necessary
- Fiscally prudent
- Directly related to and within the scope of the employee's current responsibilities and/or the school district's professional development plan; and/or
- Critical to the instructional or operational needs of the district.

All request forms are to be submitted at least eight to ten (8-10) weeks prior to the travel date. This will allow time for administrative review, Board of Education approval and Executive County Superintendent approval, if necessary.

#### Attachments to Request Form

All requests for attendance at the conference must have the following items attached to the request form:

1. Justification Statement

Employee shall provide a brief statement that includes the primary purpose of the travel and the key issues that will be addressed at the event. Ref. N.J.A.C. 6A:23A-7.5(b) (4)

2. Board Resolution

The approving administrator shall prepare the appropriate travel resolution (see sample) and attach the resolution to the request form. Resolutions should also be sent electronically to the Superintendent or Designee's Office.

3. Insurance Identification Card – Required Submission

All employees and board members using privately-owned cars in the performance of their duties for the school district shall present a New Jersey Insurance Identification Card indicating that insurance coverage is in full force and effect with companies approved by the State Department of Banking and Insurance. The insurance ID card is to be submitted to the Superintendent or Designee's Office with the travel request form. Ref. N.J.A.C. 6A:23A-7.9(c) (4v)

For each travel request, the employee shall submit the insurance identification card when using a personal vehicle.

### **Checklist for Superintendent or Designee Review**

A Checklist for Superintendent or Designee Review has been prepared for the employee to use as a guide when submitting travel requests to the Superintendent or Designee. **(See Appendix B)**

#### **B. APPROVALS NEEDED – PRIOR TO TRAVEL**

##### **1. Superintendent; Board Approval – Prior to Travel Event—N.J.S.A. 18A-11-12 (f)**

All travel must be approved prior to the travel date. Employees requesting to attend a conference must receive the following approvals:

- Superintendent or Designee – Prior to the travel date; and
- Board of Education – Prior to the travel date.

The Board of Education is prohibited from approving a travel resolution after the travel has been completed. Ref. N.J.S.A. 18A:11-12(4)(i)

##### **2. Executive County Superintendent Approval – Out of State Travel Only** Pursuant to N.J.A.C. 6A:23A-5.9(c), written approval is needed from the Executive County Superintendent if:

- Out of state travel event has a total cost that exceeds \$5,000 – regardless the number of attendees; or where
- Six (6) or more individuals from the district are to attend the same out-of-state travel event.

##### **Executive County Superintendent – Approval Process**

- Obtain approval of Superintendent – Conference Form
- Obtain approval of Board of Education
- Complete Travel Request Form – Executive County Superintendent  
Obtain Superintendent’s signature
- Submit the form with any documentation to assist the decision-making process (one month prior to travel event)

##### **3. Out of Country Travel -- Approval**

For all employee and board member travel events out of the country, regardless of cost or number of attendees, the school district shall obtain the prior written approval of the Executive County Superintendent. Such requests must be supported by detailed justification. It is expected that approvals will be rare. Ref. N.J.A.C. 6A:23A-5.9(d)

##### **4. Unforeseen Travel Situations – Approval**

There may be an occasion where unforeseen situations arise wherein a travel request cannot receive prior approval of the Board of Education. A memo shall be prepared and sent to the Superintendent of Schools outlining the compelling reason(s) and justification for the employee to attend the travel event.

# Travel Conferences

The Superintendent of Schools, in granting approval, shall also request permission from the Executive County Superintendent or his/her designee. No travel in these types of unforeseen situations shall take place unless approval is received from the

- Superintendent of Schools; and the
- Executive County Superintendent of Schools or his/her designee.
- Travel to conferences, conventions and symposiums are not considered to be emergencies and shall not be approved after the fact. Ref. N.J.A.C. 6A:23A-7.4(e)

The Board of Education shall ratify the travel request at its next regularly scheduled meeting.

## 5. **Alternate Approval Authority**

The Superintendent of Schools may designate an Alternate Approval of Travel Authority and shall have the authority to approve travel requests in the absence of the Superintendent. Ref. N.J.A.C. 6A:23A-7.4(a)(1)

## C. **TRAVEL ACTIVITIES**

The travel activities listed are to be prepared, reserved, and/or scheduled only after official approvals have been granted. Any costs for unauthorized unapproved travel will be paid by the employee. An employee who travels in violation of the school district's policy and/or N.J.S.A. 18A:11-12(s) shall be required to reimburse the school district in the amount of three (3) times the cost associated with the event.

### 1. **Conference Registration– Purchase Order**

Registration for conferences shall be made by preparing a purchase order for the vendor. Purchase orders should be prepared well in advance for the vendor to receive the registration.

Some conferences require the registration to be pre-paid. If this is the case then a Request for Vendor Check form shall be completed and attached to the purchase order and submitted to the Business Office before the purchase order deadline.

Please note: IMPORTANT! – Purchase Order Attachments

No purchase orders will be signed or processed unless the following is attached:

- Approved Request for Attendance at Conference Form;
- Approved Board Resolution;
- Executive County Superintendent Approval – if applicable; and
- Copy of the Registration Form.

### 2. **Travel Routing**

All travel shall be by the most direct, economical and usually-traveled route. Travel by other routes as a result of official necessity shall only be eligible for payment or reimbursement if satisfactorily established in advance of such travel.

# Travel Conferences

In any case, where a person travels by indirect route for personal convenience, the extra expense shall be borne by the individual.

Reimbursement for expenses shall be based only on charges that do not exceed what would have been incurred by using the most direct, economical and usually-traveled route.

## 3. Travel Methods

For the purposes of these rules, “transportation” means necessary official travel on railroads, airlines, shuttles, buses, taxicabs, school district-owned or leased vehicles and personal vehicles.

The purchase or payment of related transportation expenses shall be made by purchase order or personally by a school district employee, or board of education member and reimbursed at the conclusion of the travel event. An actual invoice or receipt for each purchase or expense shall be submitted with a claim for reimbursement. Ref. N.J.A.C. 6A:23A-7.10(a)

### Quotations Needed – Air Fare Only

Air and rail tickets shall be purchased via the internet if possible, using online travel services such as Travelocity, Expedia or Hotwire. Reimbursement for air fare without documentation from at least three (3) airlines and/or services is prohibited. Ref. N.J.A.C. 6A:23A-7.8(a)(17)

#### a. Air Travel

Air travel shall only be authorized when determined that it is necessary and advantageous to conduct school district business.

- The most economical air travel should be used, including the use of discounted and special rates.
- The following options should be considered when booking tickets:
  - Connecting versus nonstop flights;
  - Departing earlier or later compared to the preferred departure time;
  - Utilizing alternative airports within a city, i.e., Chicago, Illinois – Midway Airport versus O’Hare Airport;
  - Utilizing alternative cities, i.e., Newark versus Philadelphia.
  - Utilizing “low cost” airlines; and
  - Exploring alternate arrival and/or departure days.
- No employee or board member can earn benefits as a result of school district-funded travel. Employees and board members are prohibited from receiving “Frequent Flyer” benefits accruing from school district-funded travel.
- Airfare other than economy (i.e., Business or First Class) shall not be fully reimbursed by the school district except when traveling in such classes:
  - Is less expensive than economy;
  - Avoids circuitous routings or excessive flight duration; or
  - Would result in overall transportation cost savings.

# Travel Conferences

- All airfare other than the economy and not covered by the above exceptions purchased by an employee or board member shall only be reimbursed at the economy rate for the approved destination.
- Cost estimates on travel requests and associated authorizations shall be consistent with current airline tariffs, with consideration of available special fares or discounts, for the requested destination.

**Airline tickets shall not be booked until all necessary approvals have been obtained.**

- Justification shall be required when actions by a traveler result in additional expenses over and above the authorized travel request. Sufficient justification shall be considered only for factors outside the control of the purchaser. Additional expenses without sufficient justification shall not be reimbursed.
- Justification shall accompany requests for airline ticket reimbursement when purchased by employees or board members contrary to the above regulations. Sufficient justification shall be considered only for factors outside the control of the purchaser. Noncompliant purchases without sufficient justification shall not be reimbursed. Reimbursement of purchases with sufficient justification shall be otherwise permitted and reimbursed in accordance with the above procedures.

## Baggage Fees – Airline

The district recognizes that airline baggage that was once checked in without cost now has a minimum fee of \$35.00 per bag assessed by the airlines.

The New Jersey Administrative Code is silent about reimbursement of airline baggage fees, however, it is noted in two separate citations pertaining to airline travel that additional expenses incurred by the traveler "... outside the control of the purchaser" may be considered for reimbursement.

## Baggage Fee Reimbursement – Limit One (1) Bag

The district will consider in accordance with N.J.A.C. 6A:23A-7.9(c)(2)(viii/ix) reimbursing the employee or board members up to \$35.00 for one bag checked in. Receipts must be provided for reimbursement as well as documentation from the airline that the baggage fee is a required fee. (Ref. NJ Circular 20-04 OMB Page 12 Item C-11)

### **b. Rail Travel**

- Rail travel shall only be authorized when determined that it is necessary and advantageous to conduct school district business.
- The most economical scheduling of rail travel shall be utilized, including excursions and government discounts whenever applicable.



# Travel Conferences

- When one employee or board member is traveling within the Northeast Corridor, NJ Transit shall be used as the rail option. Use of Amtrak will not be authorized unless it is the only means of travel available.
- The use of high-speed rail services, such as Acela, shall not be authorized.
- All rail travel, including rail travel in the Northeast Corridor must be processed in the same manner as prescribed for Air Travel.

## Travel Reservations – Air and Rail Travel

- Quotations Needed (3)

Air and rail tickets shall be purchased via the internet if possible, using online travel services such as Travelocity, Expedia, or Hotwire.

Reimbursement for airfare without documentation from at least three (3) airlines and/or services is prohibited. Ref. N.J.A.C. 6A:23A-7.8(a)(17)

- Reservations – Prepaid by Employee; Board Member

Travel costs may be prepaid by the employee or board member. At the conclusion of the travel, a purchase order for reimbursement may be prepared and submitted

## Please note: IMPORTANT! – Purchase Order Attachments

No purchase orders will be signed or processed unless the following is attached:

- Approved Request for Attendance at Conference Form;
- Approved Board Resolution;
- Executive County Superintendent Approval, if applicable; and
- Originals Receipts

## **c. Automobile Vehicles**

- Mileage Rate

Mileage allowance in lieu of actual expenses of transportation shall be allowed at the rate authorized by the annual New Jersey State Appropriations Act, or a lesser rate at the board's discretion for an employee or board member traveling by his personally-owned vehicle on official business. Currently, the reimbursement mileage rate is \$0.35 per mile.

In accordance with the OMB circular, if any condition in an existing negotiated contract is in conflict with the circular, such as the mileage reimbursement rate, the provision of the contract will prevail.

Parking and toll charges shall be allowed in addition to the mileage allowance.

Reimbursement for travel to points outside the state by automobile shall be permitted when such arrangements prove to be more efficient and economical than other means of public transportation.

# Travel Conferences

In determining the relative costs of private and public transportation, all associated costs (i.e., tolls, taxicabs, airport or station transfers, etc.) shall be considered.

- Travel Mileage Form

All persons using their personal vehicle on board approved travel shall complete the district:

Travel – Mileage Form

Wherein pursuant to NJ Circular 20-04 OMB, Section VIII H-4 normal commutation expense must be deducted when calculating mileage allowance.

- Insurance Identification Card – Required Submission

All employees and board members using privately-owned cars in the performance of their duties for the school district shall present a New Jersey Insurance Identification Card indicating that insurance coverage is in full force and effect with companies approved by the State Department of Banking and Insurance. The insurance ID card is to be submitted to the Superintendent or Designee's Office with the travel request form. Ref. N.J.A.C. 6A:23A-7.9(c)(4v)

Employees who are out-of-state residents must provide appropriate insurance identification in lieu of the New Jersey Insurance Identification Card.

- Vehicle Registration -- Required Submission

All individuals using personal vehicles on a travel event must submit a copy of the vehicle registration with the purchase order for travel reimbursement. Ref. N.J.A.C. 6A:23A-7.13(b)

All travel by automobile must be done by the most direct, economical and usually traveled route. Travel miles will be the actual mileage traveled. The Business Office will use [www.mapquest.com](http://www.mapquest.com) as a verifying guide, if necessary.

- Carpooling

The Board encourages the use of carpooling to conferences for economic and environmental reasons. **The Board will only reimburse the employee/owner of the vehicle being used.**

- Tolls

Reimbursement will be provided for the cost of all tolls. Every effort should be made to obtain receipts. Copies of EZ Pass statements highlighting the tolls paid are acceptable documentation.

# Travel Conferences

## Limousine Services and Chauffeuring Costs – Prohibited

The Board of Education shall not be responsible, nor bear the costs for limousine services or chauffeuring costs to and from the event or during the event.

- Parking Costs

Reimbursement will be provided for the cost of all reasonable parking costs.

A receipt for parking payment is required for reimbursement.

- Ground Travel at the Event

  - Taxicabs

Necessary taxicab charges are permitted. However, travel to and from airports, downtown areas, and between hotel and event site shall be confined to regularly scheduled shuttle service, whenever such service is complimentary or is less costly. If shuttle service is not available, taxicabs may be used—the receipt is requested for reimbursement.

## Car Rentals – Prohibited; Exceptions

Car rentals, either utilized for airport transportation or transportation at a conference, convention, etc., are prohibited unless absolutely necessary for the conduct of school district business. Justification must accompany any request for car rentals. If approved, the most economical scheduling of car rental is to be used, including the use of subcompacts, discounted and special rates. An example of the justified use of car rental is when an employee is out of state, making inspections at various locations, and the use of public transportation is impractical. When car rental is authorized, the employee shall not be issued an advance payment for the anticipated expense associated with the rental.

## 4. **Subsistence Allowance**

### a. **One Day Trips** -- N.J.S.A. 18A:11-12(n)

One day trips are not eligible for subsistence (lodging, meals, incidentals) payment or reimbursement except for mileage; tolls and reasonable parking costs, exceptions are noted in NJ Circular 20-04 OMB and N.J.A.C. 6A:23A-7.11(a)

### b. **Overnight Travel – Within New Jersey** – Prohibited

In accordance with NJ Circular 20-04 OMB Section X-B and N.J.A.C. 6A:23A-7.11(b)

***“No overnight travel is permitted within the State”.***

# Travel Conferences

- Exceptions to Overnight Travel In-State Rule

Pursuant to the OMB Circulars, generally, overnight travel shall not be eligible for subsistence reimbursement if travel is within the State. Overnight travel is permitted if such travel is authorized or is a required component of a grant, donation, or other funding agreement with the district. The specific required overnight in-state travel event must be detailed in the approved grant, donation, or other fund acceptance agreement along with number of employees (s), board member(s) and total cost. All reimbursements are subject to these rules unless the funding acceptance agreement specifies otherwise. *Ref. N.J.A.C. 6A:23A-7.11(b)*

- Exception – Commissioner’s Waiver

The Commissioner shall be authorized to grant waivers for overnight travel for school board members and school district employees to attend in-state conferences. Such waivers will be granted in only extremely limited circumstances, where the sponsoring organization can demonstrate that the conference is broad and multi-disciplinary in scope, incorporates content offerings from numerous specialty areas, and includes important professional development opportunities and/or required training. In addition, the sponsoring organization must demonstrate that the conference’s content, structure, and anticipated attendance necessitate that it be held on multiple consecutive days with overnight lodging.

- Limitation – 50 Mile Commute

If a waiver of the prohibition on overnight travel is granted pursuant to this subsection, it shall permit reimbursement for travel expenses for only those individuals whose home to convention commute exceeds 50 miles.

- No Reimbursement – Prior to Check-in; After Check-out

Overnight travel within the State shall not be eligible for subsistence reimbursement if travel is on the day prior to the start of the conference. Reimbursement shall be prohibited for lodging prior to time for the first day of the event or after check-out time on the last day of the event. *Ref. N.J.A.C. 6A:23A-7.11 (e)*

# Travel Conferences

## c. Overnight Travel – Out of State

### Limitations – 50 Mile Commute

Out-of-State travel events shall be limited to the fewest number of board members or affected employees needed to acquire and present the content offered to all board members or staff, as applicable, at the conclusion of the event. Lodging may only be provided if the event occurs on two or more consecutive days and where home to event commute exceeds 50 miles. *Ref. N.J.A.C. 6A:23A-7.11(d)*

## d. Overnight Travel – In State/Out of State

### Federal GSA Per Diem Rates – Lodging, Meals and Incidentals

The US General Services Administration publishes a schedule of federal per diem rates in the Federal Register for approved overnight travel by the event location. The latest federal per diem rates schedule for lodging, and meals and incidental expenses by location can be found at [www.gsa.gov](http://www.gsa.gov).

Allowable per diem reimbursement for lodging, meals and incidentals shall be actual reasonable costs, not to exceed the federal per diem rates for the event location. Registration and conference fees are not subject to the federal per diem rate caps. If the event location is not listed, the maximum per diem allowance shall be \$46 for meal/incidental expenses and \$77 for lodging or amounts listed in any superseding NJOMB circular.

## e. Lodging

Pursuant to N.J.S.A. 18A:11-12(o) (2), reimbursement for lodging expenses for overnight travel, out-of-state or in-state as authorized by the Commissioner, may exceed the federal per diem rates if the hotel is the site of the convention, conference, seminar or meeting and the going rate of the hotel is in excess of federal per diem rates.

### Lodging Reservations (Hotel is Convention Site)

Board and employees are responsible for hotel reservations and payments. On their return reimbursement will be issued. The reservations must be for the regular conference room rate. The district will not reimburse for any room upgrades. Some hotels require prepayment. The following items shall be attached to the purchase order:

1. Approved Request for Attendance at Conference Form;
2. Approved Board Resolution; and
3. Executive County Superintendent Approval Letter (if applicable).

Please note: Hotels usually reserve a block of rooms for conference attendees at a special conference rate. Once that block has been sold out, the hotel will make rooms available at the regular hotel rate. If this is the case, the Board will only reimburse the employee or Board Member for the conference room rate. Any extra costs above the conference room rate shall be borne by the employee/Board Member.

# Travel Conferences

## Lodging Reservations (Hotel is NOT Convention Site)

Lodging expenses may not exceed the Federal maximum per diem rate for lodging in the designated city. All payments for lodging that is not the hotel site are to be borne by the attendee. The Board will only reimburse the maximum per diem rate.

## **f. Meals and Incidental Expense (M & IE)**

- **One-Day Trips**

One-day trips that do not involve overnight lodging are not eligible for any meal and incidental expense reimbursement (M & IE), except as noted in NJ Circular Letter 20-04 OMB.

- **Overnight Travel – Per Diem Meal & Incidental Expense Rates**

NJ Circular Letter 20-04 OMB notes with references to meal per diem rates will be the actual reasonable costs, however, not to exceed the federal per diem rates, as established in the Federal Register for the current year.

The federal per diem rates may be found on [www.gsa.gov](http://www.gsa.gov).

The meals and incidental expenses reimbursement rate (M & IE) range from \$46.00 to \$71.00 (on travel days, GSA rates are reduced to 75% of the meal and incidental allowance rate) per diem as follows:

- **GSA Meals/Incidental Expense Worksheet**

Included with these rules and regulations is a GSA Meals/Incidental Expense Worksheet. This worksheet is to be used when visiting the Federal government website [www.gsa.gov](http://www.gsa.gov) to find out the actual rate for M & IE for the location of the event. *The Expense Voucher Form is to be attached to all purchase orders for reimbursement.*

Please note: If the employee/board member's destination is somewhere other than the locations listed in the Federal Rate then the maximum reimbursement is \$31.00 per diem for meals and incidentals.

- **Meals; Original Receipts Required**

- **Certification of Expenditures – Meals Reimbursement**

All employees and board members seeking reimbursement for meals and incidentals shall sign the Expense Travel Form and certify that all expenditures were actual and reasonable and in compliance with the Travel Administrative rules of the XXXXX Board of Education.

# Travel Conferences

- Meals Included in Registration Fee

In accordance with N.J.S.A. 18A:11-12(o)(6) employees shall not request reimbursement for meals if meals are included in the conference registration fee.

If the meal is not part of a one-sum fee for a travel event, reimbursement may be approved for the full cost of an official convention meal that the employee or board member attends, when such meal is scheduled as an integral part of the convention or conference proceedings. Receipts shall be submitted in order to obtain reimbursement in such situations. The amount of the federal per diem rate for the corresponding meal shall be deducted from that day's subsistence allowance.

The allowance for a meal or meals, or incidentals shall not be eligible for reimbursement when included and paid in the registration fee, the cost of lodging or transportation charge.

- Miscellaneous Restrictions

In any cases in which the total per diem reimbursement is greater than the federal per diem rates, the costs shall be considered excessive in the absence of substantial justification accompanying the travel voucher submitted by the employee or board member.

Employees and board members shall patronize hotels and motels that offer special rates to government employees unless alternative lodging offers greater cost benefits or is more advantageous to the conduct of school district business.

Actual subsistence expenses shall not be reimbursable if paid by the traveler to a member of his family, or another school district employee, or a member of the family of another school district employee. *Ref. N.J.A.C. 6A:23A-7.11(f)*

- Meal Allowances; Certain Situations

Meals for in-state travel shall not be eligible for the reimbursement except as expressly authorized within these regulations. Meals during one-day, out-of-state trips required for school business purposes may be authorized for breakfast, lunch and/or dinner in an amount permitted by NJOMB. The Commissioner shall post the most current rates on the Department website for reference.

Lunch for training sessions and retreats may be authorized for an amount up to \$7 per person only when it is necessary that employees or board members remain at a site *other than* their school district and there are no viable options for lunch at the off-site location. If lunch is included in a one-sum registration fee for the training session, the full amount is eligible for reimbursement if reasonable. Refreshments for breaks may also be provided at training sessions and retreats held at a site *other than* the school district. Therefore, providing lunch for staff meetings and in-service days or for staff that comes from other parts of the school district shall not be permitted. (See N.J.A.C. 6A:23A-7.12(d)). Also, per N.J.S.A. 18A:11-12 (a) (1)(d), board retreats shall be held onsite unless there is no school district site available.

# Travel Conferences

Subsistence expenses for an employee or board member shall not be allowed at the school district or within a radius of ten miles thereof, except for meals expressly authorized by and in accordance with the provisions of this section. Non-allowed expenses include but are not limited to meals and refreshments for staff meetings and in-service days. *Ref. N.J.A.C. 6A:23A-7.*

## 5. Travel Expenses; Expenditures

### a. Allowable Expenses

All subsistence expenses – lodging; meals; incidentals; travel previously mentioned including:

- Internet Connection Service - The Board will reimburse daily internet connection service fees if the internet service is used for district business. (Receipt required.)
- Gratuities – The Board will reimburse all gratuities for valet parking, baggage service, maid service, etc., not to exceed the published current Incidental Expense amount listed in the GSA Domestic Per Diem Rate schedule.
- Other expenses that are defined as essential to transacting official business and have been pre-approved.

### b. Expenses Not Allowed

The Board will not reimburse the following:

- Alcoholic Beverages – The Board will not reimburse for alcoholic beverages. If it is part of the food bill, the employee must so notify the Board by deleting the amount from the request for reimbursement.
- Charges for laundry; cleaning; valet services.
- Entertainment -- Any and all entertainment including hotel in-room movies, amusement, diversion and social activities and any costs directly associated with such costs/tickets to shows or sports events, meals, lodgings, rentals, transportation and gratuities.
- Food for Spouse; Relatives; Friends; etc. – The Board will not reimburse any food or beverage costs for spouses, relatives, friends, etc. Only costs incurred by the employee and in accordance with the GSA per diem rate will be considered.
- Gratuities in excess of the Federal Per Diem Rate.
- Hospitality Rooms.
- Souvenirs, memorabilia, promotional items or gifts.
- Other non-conference-related expenses.



# Travel Conferences

## **c. Other Travel Expenditures; Expenses Not Eligible for Reimbursement**

- Subsistence reimbursement for one-day trips, except for meals expressly authorized by and in accordance with the provisions of N.J.A.C. 6A:23A-7.12;
- Subsistence reimbursement for overnight travel within the State, except where authorized by the Commissioner in accordance with the procedures set forth in N.J.A.C. 6A:23A-7.11;
- Travel by board members or employees whose duties are unrelated to the purpose of the travel event or who are not required to attend to meet continuing education requirements or to comply with law or regulation;
- Travel by spouses, civil union partners, domestic partners, immediate family members and other relatives;
- Costs for employee attendance for coordinating other attendees' accommodations at the travel event;
- Lunch or refreshments for training sessions and retreats held within the school district including in-service days and for employee participants traveling from other locations within the school district;
- Training to maintain a certification that is not required as a condition of employment (example: CPE credits to maintain a CPA license if the employee is not required to be a CPA for continued school district employment).

## **d. Conference Related Expenses – Prior Approval Needed**

While the Board appreciates that there are many books, materials, supplies, videos and other items available for purchase in preparation for the conference, at the conference itself, and any post-conference events, the Board cannot be expected to reimburse employees/board members for any of these items purchased, unless so previously provided by the Superintendent and/or Board resolution. These items should be ordered upon return from the conference through the purchase order process.

# Travel Conferences

## e. Travel Reimbursement Procedures – Ref. N.J.A.C. 6A:23A-7.13 et seq.

### 1. Memorandum of Expenditures

All persons authorized to travel must keep a memorandum of expenditures, noting each time the expense incurred, together with the date incurred.

### 2. Travel Reimbursement Voucher

The travel voucher shall be completed by the employee or board member to document the details of the travel event. The travel voucher must be signed by the employer or board member to certify the validity of the charges for which reimbursement is sought. The form must also bear the signatures of approval officials for processing. **(See Appendix H)**

### 3. Documentation Required - Expenditures

a. Lodging - Copy of the hotel bill with all personal charges deducted from the bill. When lodging is shared jointly, the fact must be stated on the travel voucher. Credit card statements are not acceptable forms of documentation for lodging expenses.

b. Meals/Incidentals – Completed and signed GSA Meals/Incidentals Worksheet.

c. Transportation – Personal Vehicle

- Actual mileage traveled – dates of travel
- Insurance Identification Card
- Vehicle Registration
- Supporting Documentation – Miles Traveled
- ✱ Map Quest
- ✱ Google Maps
- Mileage Computation Worksheet

All persons are to deduct home to work (commute) miles from the total mileage traveled.

d. Tolls – Toll receipts or EZ Pass Documentation

e. Transportation -- Other

Actual receipts – no credit card statements (air, rail, bus).

Air Fare – Evidence of three (3) quotations

f. Ground Travel

Shuttle – Actual Receipt

Taxi – Receipt and Explanation of Use

g. Parking – Receipt required except for parking meters.

h. Telephone/Internet Service

Telephone receipt showing business-related numbers

Internet service – receipt required – hotel bill

# Travel Conferences

## **f. Documentation Required – Other**

- a. Purchase Order  
The purchase order shall be duly signed by the School Business Administrator.
- b. Travel Report (Copy)  
The Travel Request Form shall be completed and signed by the Supervisor noting prior approval dates. Copies of the resolution of the conference shall be attached.
- c. Board of Education Resolution (Copy).
- d. Executive County Superintendent approval (if applicable)
- e. Copy of Travel Report  
All persons authorized to travel shall prepare and submit a brief report explaining the travel event. A copy of the travel report shall be submitted with the purchase order for reimbursement.
- f. Envelope – Receipts  
All original receipts with the date and time of expense incurred shall be placed in an envelope and attached to the Travel voucher.

### Attachments to Purchase Order

All required documentation required shall be attached to the purchase order requesting reimbursement.

### Receipts

Actual and original receipts are required. Credit card statements shall not be accepted as documentation of expenses.

### Reimbursement Payment

The School Business Administrator shall not approve or issue payment until all required documentation has been submitted and verified.

### **Deadline to Submit Reimbursement – June 30<sup>th</sup>**

All outstanding travel vouchers for the school year ending June 30<sup>th</sup> shall be submitted as soon as possible after June 30<sup>th</sup> regardless of the amount, notwithstanding. N.J.A.C. 6A:23A-7.13(f)

### [Travel Reimbursement Checklist](#)

A Travel Reimbursement Checklist has been provided to assist in the reimbursement process.

# Travel Conferences

## **g. Miscellaneous Provisions**

### **1. Advance Payment -- Prohibited**

No employee or school board member shall receive any monies for travel in advance of the travel. The payment of travel expenses shall be made personally by a school district employee or board member and reimbursed at the conclusion of a travel event. This applies to travel-related purchases for which a purchase order is not applicable. This section does not preclude the district from paying the vendor directly with the proper use of a purchase order (e.g., for registration, airline tickets, hotel). *Ref. N.J.S.A. 18A:11-12(j)*

### **2. Exclusions from Travel Policy**

In accordance with N.J.S.A. 18A:11-12(m) the Board of Education recognizes that travel procedures may be included in some employee contracts. Furthermore, there may be statutory requirements or federal regulatory requirements that may lead to an employee's or board member's travel. If any condition in a negotiated contract, in any administrative regulation or any statute, is in conflict with these regulations, the provisions of the contract, regulation, or statute shall prevail.

### **3. Travel Report Required**

In accordance with N.J.S.A. 18A:11-12(d) every employee and board member is required to submit a brief report within at least thirty (30) days explaining the following:

- Primary purpose for the travel;
- Key issues addressed at the event; and the
- Relevance to improving instruction and/or the operation of the school district.

Board members are to provide the report at the Board meeting that follows the travel.  
Employees  
are to file the report with their immediate supervisor.

A copy of the travel report is to be submitted to the Business Office as an attachment to any purchase order for travel reimbursement.

### **4. Travel Charge Cards -- Prohibited**

Use of travel charge cards is not authorized for use by school districts.

### **5. Travel – Paid by Employee**

All travel, where part or the entire cost is paid by the employee, requires the approval of the Superintendent or Designee and the Board of Education, prior to the travel event.

# Travel Conferences

## 6. One Day Trips

One day trips are only eligible for reimbursement for conference registration, mileage, tolls are meets and reasonable parking costs.

## 7. Employee/Parent Travel – Personal Business Days

Employees who travel as a parent to a conference designed for parents and/or parental involvement shall apply to be absent from work using personal business days.

## 8. Retreats – School District Employees with Board Members

Retreats are meetings with school district employees and school board members, held away from the normal work environment at which organizational goals and objectives are discussed. If available, school district facilities shall be utilized for this type of event. N.J.S.A. 18A:11-12(a)(1)(d).

- Lunch or Refreshments – Onsite – Prohibited  
Lunch or refreshments for retreats held within the school district are prohibited.  
N.J.A.C. 6A:23A7-8(a) (6)
- Lunch and Refreshments – Offsite – Permitted  
Lunch and refreshments for training sessions may be authorized for an amount up to \$7.00 per person only when it is necessary that employees or board members remain at a site other than the school district and there are no viable options for lunch at the offsite location.  
(N.J.A.C. 6A:23-7.12(c)) (N.J.A.C. 6A:23A-7.12(c)(3))

# Travel Conferences

## **h. Travel Violations—Monitoring/Compliance**

All travel will be monitored to ensure compliance as follows:

### Office of the Superintendent or Designee

The Office of the Superintendent or Designee, in conjunction with the Superintendent, shall review all requests for travel to ensure compliance with the law, code, policy and administrative rules. Any employee who violates the law, code, policy or rules shall be subject to the penalties assigned in N.J.S.A. 18A:11-12(s).

### Office of the School Business Administrator

The Office of the School Business Administrator shall review all requests for travel reimbursement to ensure compliance with the law, code, policy and administrative rules in accordance with N.J.A.C. 6A:23A-7.6(c).

### Board of Education

If, on occasion, there is a Board of Education member who violates the school district's travel policy, law, or code, it shall be reported to the full Board of Education, who shall by board resolution, initiate sanctions outlined in N.J.A.C. 6A:23A-7.7(c) against said board members.

## **i. Sanctions for Violations of Travel Requirements**

### Maximum Travel Violations

Any board that violates its established maximum travel expenditure as set forth in N.J.A.C. 6A:23A-7.3 above, or that otherwise is not in compliance with the travel limitations set forth in this section may be subject to sanctions by the commissioner as authorized pursuant to N.J.S.A. 18A:4-23 and N.J.S.A. 18A:4-24, including reduction of State aid in an amount equal to any excess expenditure pursuant to N.J.S.A. 18A:11-12 and N.J.S.A. 18A:7F-60.

### Travel Approval Violations; Approval Authority – Superintendent or Designee

A person who approves any travel request or reimbursement in violation of the district's policy or these rules shall be required to reimburse the school district in an amount equal to three times the cost associated with attending the event pursuant to N.J.S.A. 18A:11-12. In accordance with N.J.A.C. 6A:23A-7.7(b) (1) the approval authority for travel for the District is the Superintendent or Designee.

They shall be subject to all penalties as outlined in this section.

# Travel Conferences

## Travel Reimbursement Approval Authority – School Business Administrator

The School Business Administrator is designated as the travel reimbursement approval authority. The SBA shall review and approve all requests for travel expenditure reimbursements pursuant to N.J.A.C. 6A:23A-7.6(c) and shall be subject to all penalties as outlined in N.J.A.C. 6A:23A-7.7(b).

## **j. Sanctions for Violations of Travel Requirements (continued)**

### Travel Violations - Employees

An employee or board member who violates the school district's travel policy or these rules shall be required to reimburse the school district in amount equal to three times the cost associated with attending the event pursuant to N.J.S.A. 18A:11-12.

*Ref. N.J.S.A. 18A:11-12(s), N.J.A.C. 6A:23A-7.7(c)*

### Violations of Administrative Code – Loss of State Aid

Any district Board of Education that violates its established maximum travel expenditure or that otherwise is not in compliance with the travel limitations set forth in this section may be subject to sanctions by the Commissioner including reduction of State aid in an amount equal to any excess expenditure.

*Ref. N.J.S.A. 18A:11-12(r)*

# Travel Conferences

## **k. Board of Education Members -- Travel Provisions – Approval Process**

All Board of Education members are subject to the terms and conditions listed in the Board policy and N.J.S.A. 18A:11-12 et seq. and N.J.A.C. 6A:23A-7.1 et. seq., with the following specifically noted:

### Approval of Travel – Prior Approval Needed – Ref. N.J.A.C. 6A:23A-7.4(b)

All travel for board members shall occur only upon prior approval by a majority of the full voting membership of the Board and the travel shall be in compliance with N.J.S.A. 18A:12-24 and N.J.S.A. 18A:12-24.1.

Pursuant to N.J.A.C. 6A:23A-5.9(c), written approval is needed from the Executive County Superintendent if:

- An out of state travel event has a total cost that exceeds \$5,000 – regardless of the number of attendees; or where
- Six (6) or more individuals from the district are to attend the same out of state travel event.

### Voting on Travel

Board members must recuse themselves from voting on travel where the board member, a member of his immediate family, or a business organization in which he has an interest, has a direct or indirect financial involvement that might be expected to impair his objectivity or independence of judgment.

No board member shall act in his official capacity in any matter where he or a member of his immediate family has a personal involvement that is or creates some benefit to the school official or member of his immediate family; or undertake any employment or service, whether compensated or not, which might reasonably be expected to prejudice his independence of judgment in the execution of his official duties. Ref. N.J.S.A. 18A:18A:11-12(k)(l)

The Board of Education is prohibited from approving any travel resolution after the travel has been completed.



# **Attendance at Conference**

## **Travel Request Form Executive County Superintendent Approval**

This form is to be used only for Out of State travel that meets one of the following:

- Total cost of out of state travel exceeds \$5,000.00
- More than 5 or more individuals attend the same out of state travel event

The form is to be completed by the Superintendent or Designee's Office and submitted to the Business Office for submission to the Executive County Superintendent's approval.

- \_\_\_\_\_ A. **Purchase Order**  
The purchase order for reimbursement shall be duly signed by the School Business Administrator.
- \_\_\_\_\_ B. **Travel Request Form – Copy**  
The Travel Request Form shall be completed and signed noting prior approval dates. Attached must be a copy of the itinerary and/or agenda of the travel event.
- \_\_\_\_\_ C. **Board of Education Resolution – Copy**
- \_\_\_\_\_ D. **Executive County Superintendent Approval document (if applicable)**
- \_\_\_\_\_ E. **Travel Voucher Form – Original**  
The Travel Voucher Form submitted shall document all expenses and be signed with the original signatures of the employee **and Superintendent or Designee**. The School Business Administrator shall sign the document upon review of all expenditures.
- \_\_\_\_\_ F. **GSA Meals/Incidental Worksheet -- Certified**
- \_\_\_\_\_ G. **Envelope -- Receipts**  
All original receipts with date and time of expense incurred shall be placed in an envelope and attached to the Travel Voucher.
- \_\_\_\_\_ H. **Copy of Travel Report**  
All persons authorized to travel shall prepare and submit a brief report explaining the travel event. A copy of the travel report shall be submitted with the purchase order for reimbursement.
- \_\_\_\_\_ I. **Personal Vehicle Documentation (If applicable)**  
Copy of the Vehicle Registration  
Copy of the Insurance Identification Card
- \_\_\_\_\_ J. **Travel Mileage Commute Worksheet with documentation (If applicable)**
- Mapquest
  - Google Maps
  - Yahoo Maps

**REQUEST FOR OUT OF STATE TRAVEL**

**FOR MORE THAN 5 INDIVIDUALS**

**OR AMOUNT GREATER THAN \$5,000 APPROVAL**

Directions: Complete a form for each individual in the district requesting to attend an out-of-state travel. Incomplete forms and those without the required documentation and signatures will be returned unsigned to the district. All travel must have prior board approval. For information related to lodging and per diem rates, refer to <http://www.gsa.gov>, and for eligible subsistence/reimbursement, refer to N.J.S.A. 18A: 11-12; N.J.A.C. 6A:23A-5.8; 5.9 and New Jersey OMB **Circulars:** 06-14-OMB and 08-19-OMB.

**District Name:** Plainfield Board of Education **Request Submission Date:** \_\_\_\_\_

**Name of Event:** \_\_\_\_\_ **Event Location:** \_\_\_\_\_

**District Contact Name:** Rashon K. Hasan **Phone:** 908-731-4344 **Fax:** 908-731-4345

**JUSTIFICATION OF NEED**

Provide a justification of need:

- 1) Relationship of attendance at this event to the critical instructional and operational needs of the District, including, link to the Core Curriculum Content Standards;
- 2) Explanation as to how those attending will share what they learned with others in the school district;
- 3) Documentation that the knowledge and information to be gained at this conference, cannot be obtained through more cost effective means; and
- 4) Explanation as to how the request is consistent with best practices in professional development.

**AGENDA/ITINERARY:** For each day, include the title and time of workshops to be attended. Attach the itinerary.

**Superintendent Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**School Business Administrator Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**District Board of Education approval date:** \_\_\_\_\_

**PARTICIPANTS' NAME(S) TITLE Departure Date/Time Returning Date/Time**

**Indicate type of Travel Event:**

- Training/Seminar     Convention/Conference — Regular School Business     Retreat  
 Other (specify)

**FUNDING BREAKDOWN**

Registration: \$ \_\_\_\_\_ Meals: \$ \_\_\_\_\_ Other Costs Mileage: \$ \_\_\_\_\_

Airfare: \$ \_\_\_\_\_ Parking: \$ \_\_\_\_\_ Tolls \$ \_\_\_\_\_

\*\*Lodging: \$ \_\_\_\_\_ Taxi: \$ \_\_\_\_\_ Requested: \$ \_\_\_\_\_

\* **Other Costs** (provide explanation and breakdown): \_\_\_\_\_

Account(s) Budgeted: \_\_\_\_\_ Total Amount in Budgeted Account: \$ \_\_\_\_\_

\*\*\* **For lodging, indicate if the hotel is the site of event/conference\*\*\***

List goals and objectives from the district's Professional Development Plan: \_\_\_\_\_

**For County Office Use Only**

Approval Granted: \_\_\_\_\_ Request Denied: \_\_\_\_\_ No Action Taken

Approved Costs: \_\_\_\_\_

Registration: \$ \_\_\_\_\_ Meals: \$ \_\_\_\_\_ Other Costs: \$ \_\_\_\_\_

Airfare: \$ \_\_\_\_\_ Parking: \$ \_\_\_\_\_ Total Approved: \$ \_\_\_\_\_

Lodging \$ \_\_\_\_\_ Taxi: \$ \_\_\_\_\_

Executive County Superintendent Signature \_\_\_\_\_ Date \_\_\_\_\_

# Travel Conferences

The following should be attached to each Travel Request Form:

- Per Diem Rates – these may be ascertained for a particular destination from “ [www.gsa.gov](http://www.gsa.gov) ” website. Upon entering the site select the state to get the allowable amounts for Max. Lodging; M&IE Rate, first and last day rates. You may also access the State Tax Rates & Exemption Forms from this site for your selection.
- Attach the conference lodging sheet --- if the hotel is not on the conference form or exceeds the allowable amount then an explanation must be accompanied with the submittal
- Airfare – include a copy of the flight destination along with any additional flight charges
- Include the costs for transfers, taxis and parking
- Driving mileage should be attained from “Map Quest” and a copy attached with the calculated cost for reimbursement
- Signatures from the Superintendent of Schools and Business Administrator should be on the forms
- Attach the Board approved resolution authorizing attendance

**Regulations in the NEW JERSEY ADMINISTRATIVE CODE TITLE 6A. DEPARTMENT OF EDUCATION CHAPTER 23A. SCHOOL DISTRICT FISCAL ACCOUNTABILITY, EFFICIENCY AND BUDGETING PROCEDURES (Phase I & Phase II Combined)**

**6A:23A-5.9 Out-of-State and high cost travel events**

(a) Reimbursement for all in-State and out-of-State travel shall be made pursuant to N.J.S.A. 18A:11-12.

(b) Out-of-State travel events shall be limited to the fewest number of board members or affected employees needed to acquire and present the content offered to all board members or staff, as applicable, at the conclusion of the event. Where the event is sponsored by a New Jersey-based organization and targeted to employees and/or board members of New Jersey school districts, reimbursement for lodging may be permitted only where the sponsoring organization obtains a waiver pursuant to the provisions of N.J.A.C. 6A:7.11. Where the event is national or regional in scope and targeted to school district employees and/or board members from multiple states, reimbursement for lodging may only be provided if the event occurs on two or more consecutive days and where home to event commute exceeds 50 miles.

(c) Where a travel event has a total cost that exceeds \$5,000, regardless of the number of attendees, or where more than five individuals from the district are to attend a travel event out-of-state, the school district or county vocational school district shall obtain the prior written approval of the Executive County Superintendent. The executive county superintendent shall promptly review the request and render a written decision within 10 working days.

(d) For all employee and board member travel events out of the country, regardless of cost or number of attendees, the school district or county vocational school district shall obtain the prior written approval of the Executive County Superintendent. Such requests must be supported by detailed justification. The executive county superintendent shall promptly review the request and render a written decision within 10 working days. It is expected that approvals will be rare.

# **Attendance at Conference**

## **Travel Reimbursement Expense Voucher**

The attached Travel Reimbursement Voucher is to be completed and attached to the purchase order for a reimbursement of travel expenses.

The Superintendent or Designee's signature is required prior to submission to the Business Office.

The School Business Administrator will sign upon verification of receipts and documents.

**TRAVEL REIMBURSEMENT VOUCHER**

***This form must be submitted within 10 days following board/employee's return from workshop/conference.  
Please print and attach the original receipts.***

Name \_\_\_\_\_ Position \_\_\_\_\_

Street \_\_\_\_\_ Budget Line \_\_\_\_\_

City/State/Zip Code \_\_\_\_\_ Received by: \_\_\_\_\_

Title of Workshop/Conference \_\_\_\_\_

DATE	HOTEL/TRAVEL COSTS				MEAL COSTS*			TRANSPORTATION (airfare/train)	TOTAL AMOUNT
	HOTEL	MILEAGE	TOLLS	TAXI	BREAKFAST	LUNCH	DINNER		
<b>GRAND TOTAL</b>									

*\*Mileage from school or home, whichever is the shorter distance.*

**BOARD/EMPLOYEE'S CERTIFICATION**

certify that the above expenses were incurred on behalf of the Board. I have submitted Travel Report and/or Board Training Report.  
also certify that the above expenses are correct in all respects. The dates therein specified, and the amounts charged have been actually paid for  
traveling expenses. Original itemized receipts are attached.

Board/Employee's Signature \_\_\_\_\_

Date \_\_\_\_\_

Supervisor's Signature \_\_\_\_\_

Date \_\_\_\_\_



## Travel Report Requirement

*Statutory requirements:*

After the event, **attendees must provide a brief report** that includes a description of the primary purpose for the travel, and a summary of the goals and key issues that were addressed at the event and their relevance to improving instruction or the operation of the school district. [P.L. 2007,c. 53; travel requirements at N.J.S.A. 17A:11-13]

**Brief description of the primary purpose for the travel:**

**Statutory Requirement—Travel Report**

In accordance with N.J.S.A. 18A:11-12(d), every employee is required to submit a brief report within ten (10) days or prior to receiving reimbursement:

- Primary purpose for the travel;
- Key issues addressed at the event; and the
- Relevance to improving instruction and/or the operation of the school district.

**Board members** are to file the reports with the Business Administrator.

**Employees** are to file the report with their immediate supervisor.

A copy of the travel report is to be submitted to the Business Office as an attachment to any purchase order for travel reimbursement.

Summary of the goals and key issues that were addressed at the event	Relevance to improving instruction and/or the operation of the school district

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

Place of event and date of travel: \_\_\_\_\_

# Bloodborne Pathogen Standard Operating Procedures



Procedure No.  
CSOP - BBP-HF

# Bloodborne Pathogens Cleaning Procedures

## Hard Floor

<b>Step 1</b>	<ul style="list-style-type: none"> <li>a. Secure the area using floor signs, yellow caution tape and/or barricades.</li> <li>b. Take a picture of area for record keeping.</li> <li>c. No unauthorized persons should be allowed in the area.</li> </ul>
<b>Step 2</b>	<ul style="list-style-type: none"> <li>a. Put on approved personal protective gear.</li> <li>b. Assemble approved cleaning equipment and tools.</li> <li>c. Use a bloodborne pathogens kit when available. If a kit is not available, then use approved PPE equipment and approved tools from list. (See column on the right.)</li> </ul>
<b>Step 3</b>	<ul style="list-style-type: none"> <li>a. Enter area wearing PPE.</li> <li>b. Open BBP kit or suggested tools.</li> <li>c. Apply absorbent compound to surface of contamination. Use dull scraper to stir contents to solidify gross contents.</li> <li>d. Remove the contaminated debris in a small dust pan. Place contents in red sealable trash can liner or approved bag.</li> <li>e. Place a disposable towel/rag over the gross contaminant and clean the area. Place dirty towels/rags in an approved red biohazard bag. Continue cleaning until all blood and contamination has been removed.</li> <li>f. If sharp objects exist, use tongs to handle debris. Place in approved sharps container. <b>DO NOT</b> use hands.</li> <li>g. <i>If blood spill is large, you may want to use a wet/dry vacuum to recover solution on the floor.</i></li> <li>h. Once soil has been completely removed, apply disinfectant to all surfaces. Allow disinfectant to sit wet for manufacturer's recommended contact time.</li> <li>i. Dry the area with a rag or use a mop</li> <li>j. Complete final inspection of the area</li> <li>k. Remove signage.</li> </ul>
<b>Step 4</b>	<ul style="list-style-type: none"> <li>a. Place all rags and disposable gloves in a sealable red or biohazard liner/bag.</li> <li>b. Wash hands. Put on new gloves before sealing the bag</li> <li>c. Seal bag and place in a leak proof container for transport. <b>Follow company BBP policy for liner/bag disposal.</b></li> <li>d. Goggles and/or glasses may be reused after being disinfected. <b>DO NOT</b> reuse gloves.</li> <li>e. Place box in a secure area for transport to destruction site.</li> </ul>
<b>Step 5</b>	<ul style="list-style-type: none"> <li>a. All equipment and tools are to be completely disinfected.</li> <li>b. Allow disinfectant to sit wet for manufacturer's recommended contact time.</li> <li>c. Inspect all personal clothing for any splatter.</li> <li>d. If contaminated change clothes.</li> <li>e. Bag clothes in a liner/bag and notify your supervisor..</li> </ul>
<b>Step 6</b>	Wash hands thoroughly.

### Safety Tools

- Nitrile gloves 4-6 pairs
- Bloodborne Pathogen Kit (BBP Kit).
- Eye protection glasses w/side shield, goggles or face shield
- Foot covers
- Gown

### Product Checklist

- Bloodborne Pathogen Kit (BBP Kit)
- Absorbent compound
- Appropriate disinfectant solution (properly diluted)
- Paper towels or clean rags
- Tongs
- Sharps container / leak proof box.
- Wet floor signs
- Barricade floor signs
- Yellow caution tape
- Trash can liner or approved biohazard bag
- Trigger sprayer
- Scraper
- Dust pan
- Mop bucket / wringer
- Mop handle / mop
- Wet/Dry vacuum (optional)



<b>Step 1</b>	<ul style="list-style-type: none"> <li>a. Secure the area using floor signs, yellow caution tape and/or barricades.</li> <li>b. Take a picture of area for record keeping.</li> <li>c. No unauthorized persons should be allowed in the area.</li> </ul>
<b>Step 2</b>	<ul style="list-style-type: none"> <li>a. Put on approved personal protective gear.</li> <li>b. Assemble approved cleaning equipment and tools.</li> <li>c. Use a bloodborne pathogens kit when available. If a kit is not available, then use approved PPE equipment and approved tools from list. (See column on the right.)</li> </ul>
<b>Step 3</b>	<ul style="list-style-type: none"> <li>a. Enter area wearing PPE.</li> <li>b. Open BBP kit or suggested tools.</li> <li>c. Apply absorbent compound to surface of contamination. Use dull scraper to stir contents to solidify gross contents.</li> <li>d. Remove the contaminated debris in a small dust pan. Place contents in sealable trash can liner or approved bag.</li> <li>e. Place a disposable towel/rag over the gross contaminant and clean the area. Place dirty towels/rags in an approved red biohazard bag. Continue cleaning until all blood and contamination has been removed.</li> <li>f. If sharp objects exist, use tongs to handle debris. Place in approved sharps container. <b>DO NOT</b> use hands.</li> <li>g. Once soil has been completely removed, apply approved disinfectant to all surfaces. Allow disinfectant to sit wet for manufacturer's recommended contact time.</li> <li>h. Dry the area.</li> <li>i. Perform final inspection. Release area</li> </ul>
<b>Step 4</b>	<ul style="list-style-type: none"> <li>a. Place all rags and disposable gloves in a sealable red or biohazard liner/bag.</li> <li>b. Wash hands. Put on new gloves before sealing the bag</li> <li>c. Seal bag and place in a leak proof container for transport. <b>Follow company BBP policy for liner/bag disposal.</b></li> <li>d. Goggles and/or glasses may be reused after being disinfected. <b>DO NOT</b> reuse gloves.</li> <li>e. Place box in a secure area for transport to destruction site.</li> </ul>
<b>Step 5</b>	<ul style="list-style-type: none"> <li>a. All equipment and tools are to be completely disinfected.</li> <li>b. Allow disinfectant to sit wet for manufacturer's recommended contact time.</li> <li>c. Inspect all personal clothing for any splatter.</li> <li>d. If contaminated change clothes.</li> <li>e. Bag clothes in a liner/bag and notify your supervisor.</li> </ul>
<b>Step 6</b>	Wash hands thoroughly.

<b>Safety Tools</b>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Nitrile gloves 4-6 pairs</li> <li><input type="checkbox"/> Bloodborne Pathogen Kit (BBP Kit).</li> <li><input type="checkbox"/> Eye protection glasses w/side shield, goggles or face shield</li> <li><input type="checkbox"/> Foot covers</li> <li><input type="checkbox"/> Gown</li> </ul>

<b>Product Checklist</b>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Bloodborne Pathogen Kit (BBP Kit).</li> <li><input type="checkbox"/> Absorbent compound</li> <li><input type="checkbox"/> Disinfectant solution (properly diluted)</li> <li><input type="checkbox"/> Paper towels or clean rags</li> <li><input type="checkbox"/> Tongs</li> <li><input type="checkbox"/> Sharps container / leak proof box.</li> <li><input type="checkbox"/> Wet floor signs</li> <li><input type="checkbox"/> Barricade floor signs</li> <li><input type="checkbox"/> Yellow caution tape</li> <li><input type="checkbox"/> Trash can liner or approved biohazard bag</li> <li><input type="checkbox"/> Trigger sprayer</li> <li><input type="checkbox"/> Scraper</li> <li><input type="checkbox"/> Dustpan</li> <li><input type="checkbox"/> Mop bucket / wringer</li> <li><input type="checkbox"/> Mop handle / mop</li> <li><input type="checkbox"/> Wet/Dry vacuum (optional)</li> </ul>

## Bloodborne Pathogens Cleaning Procedures - Carpet

<b>Step 1</b>	<ul style="list-style-type: none"> <li>a. Secure the area using floor signs, yellow caution tape and/or barricades.</li> <li>b. Take a picture of area for record keeping.</li> <li>c. No unauthorized persons should be allowed in the area.</li> </ul>
<b>Step 2</b>	<ul style="list-style-type: none"> <li>a. Put on approved personal protective gear.</li> <li>b. Assemble approved cleaning equipment and tools.</li> <li>c. Use a bloodborne pathogens kit when available. If a kit is not available, then use approved PPE equipment and approved tools from list. (See column on the right.)</li> </ul>
<b>Step 3</b>	<ul style="list-style-type: none"> <li>a. Enter area wearing approved PPE.</li> <li>b. Open BBP kit or suggested tools.</li> <li>c. Apply absorbent compound to the area of the carpet that is contaminated.</li> <li>d. Use dull scraper or carpet spotter bone to stir contents to solidify gross contents.</li> <li>e. Remove the gross contaminated debris using a small dust pan. Place contents in a sealable liner or approved bag.</li> <li>f. If sharp objects exist, use tongs to handle debris. Place in approved sharps container. <b>DO NOT</b> use hands.</li> <li>g. Use a pump-up sprayer or trigger sprayer to apply the approved disinfectant to the contaminated surface. Allow disinfectant to sit wet for manufacturer's recommended contact time.</li> <li>h. Use carpet extractor with room temperature water. Extract carpet, working fibers in all directions. <i>If a carpet extractor is not available, then use a wet/dry vacuum.</i></li> <li>i. Apply disinfectant a second time to the carpet and re-extract carpet. Allow disinfectant to sit wet for manufacturer's recommended contact time.</li> <li>j. Extract a final time with clean rinse water.</li> <li>k. Place air movers/fans to dry carpet.</li> <li>l. Inspect carpet when dry.</li> <li>m. Remove signs and release the area.</li> </ul>
<b>Step 4</b>	<ul style="list-style-type: none"> <li>a. Place all rags and disposable gloves in a sealable red or biohazard liner/bag.</li> <li>b. Wash hands. Put on new gloves before sealing the bag</li> <li>c. Seal bag and place in a leak proof container for transport. <b>Follow company BBP policy for liner/bag disposal.</b></li> <li>d. Goggles and/or glasses may be reused after being disinfected. <b>DO NOT</b> reuse gloves.</li> <li>e. Place box in a secure area for transport to destruction site.</li> </ul>
<b>Step 5</b>	<ul style="list-style-type: none"> <li>a. All equipment and tools are to be completely disinfected.</li> <li>b. Hoses, solution tanks, floor tools all must be disinfected inside and out. Allow disinfectant to sit wet for manufacturer's recommended contact time.</li> <li>c. Inspect all personal clothing for any splatter.</li> <li>d. If contaminated change clothes.</li> <li>e. Bag clothes in a liner/bag and notify your supervisor.</li> </ul>
<b>Step 6</b>	Wash hands thoroughly.

### Safety Tools

- Nitrile gloves 4-6 pairs
- Bloodborne Pathogen Kit (BBP Kit).
- Eye protection glasses w/side shield, goggles or face shield
- Foot covers
- Gown

### Product Checklist

- Bloodborne Pathogen Kit (BBP Kit).
- Absorbent compound
- Appropriate disinfectant solution
- Paper towels or clean rags
- Tongs
- Sharps container / leak proof box.
- Wet floor signs
- Barricade floor signs
- Yellow caution tape
- Trash can liner or approved biohazard bag
- Pump-up sprayer
- Trigger sprayer
- Scraper
- Dust pan
- Carpet spotter bone
- Carpet extractor
- Air movers/fans
- Wet/Dry vacuum

*Note: Apply a small amount of disinfectant on an inconspicuous area of the carpet. Make sure the disinfectant does not remove the color from the carpet fiber.*

*Note: Careful consideration must be given to the amount of fluids that may have contaminated the carpet. Replacing / re-sectioning the area may be the best option.*



Procedure No. CSOP - BBP-OS	<h2 style="margin: 0;">Bloodborne Pathogens Cleaning Procedures</h2> <h3 style="margin: 0;">Outdoor Surfaces</h3>
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<b>Step 1</b>	<ul style="list-style-type: none"> <li>a. Secure the area using floor signs, yellow caution tape and/or barricades.</li> <li>b. Take a picture of area for record keeping.</li> <li>c. No unauthorized persons should be allowed in the area.</li> </ul>
<b>Step 2</b>	<ul style="list-style-type: none"> <li>a. Put on approved personal protective gear.</li> <li>b. Assemble approved cleaning equipment and tools.</li> <li>c. Use a bloodborne pathogens kit when available. If a kit is not available, then use approved PPE equipment and approved tools from list. (See column on the right.)</li> </ul>
<b>Step 3</b>	<ul style="list-style-type: none"> <li>a. Enter area wearing PPE.</li> <li>b. If activity is in the area, move the occupant event to another location. Control the affected area and keep all people away from the area.</li> <li>c. Open BBP kit or assembled tools from this list</li> <li>d. Using absorbent compound apply to surface of contamination. Use dull scrapper to stir contents to solidify gross contents.</li> <li>e. Remove the gross contaminated debris in a small dust pan. Place contents in red sealable trash can liner or approved bag.</li> <li>f. To avoid splatter or increasing the size of the affected area, place a disposable towel /rag over gross contaminant.</li> <li>g. If a sharp objects exist, use tongs to handle debris. Place in approved sharps container. DO NOT use hands.</li> <li>h. After proper dwell time has occurred a water hose or 5 gallon bucket may be used to flush the disinfected fluids.</li> <li>i. Let area dry.</li> <li>j. Final inspection.</li> <li>k. Remove signs and release the area.</li> </ul>
<b>Step 4</b>	<ul style="list-style-type: none"> <li>a. Place all rags and disposable gloves in a sealable red or biohazard liner/bag.</li> <li>b. Wash hands. Put on new gloves before sealing the bag</li> <li>c. Seal bag and place in a leak proof container for transport. <b>Follow company BBP policy for liner/bag disposal.</b></li> <li>d. Goggles and/or glasses may be reused after being disinfected. <b>DO NOT</b> reuse gloves.</li> <li>e. Place box in a secure area for transport to destruction site.</li> </ul>
<b>Step 5</b>	<ul style="list-style-type: none"> <li>a. All equipment and tools are to be completely disinfected.</li> <li>b. Allow disinfectant to sit wet for manufacturer's recommended contact time.</li> <li>c. Inspect all personal clothing for any splatter.</li> <li>d. If contaminated change clothes.</li> <li>e. Bag clothes in a liner/bag and notify your supervisor.</li> </ul>
<b>Step 6</b>	Wash hands thoroughly.

<b>Safety Tools</b>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Nitrile gloves 4-6 pairs</li> <li><input type="checkbox"/> Bloodborne Pathogen Kit (BBP Kit).</li> <li><input type="checkbox"/> Eye protection glasses w/side shield, goggles or face shield</li> <li><input type="checkbox"/> Foot covers</li> <li><input type="checkbox"/> Gown</li> </ul>

<b>Product Checklist</b>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Bloodborne Pathogen Kit (BBP Kit).</li> <li><input type="checkbox"/> Absorbent compound</li> <li><input type="checkbox"/> Appropriate disinfectant solution (properly diluted)</li> <li><input type="checkbox"/> Paper towels or clean rags</li> <li><input type="checkbox"/> Tongs</li> <li><input type="checkbox"/> Sharps container / leak proof box.</li> <li><input type="checkbox"/> Wet floor signs</li> <li><input type="checkbox"/> Barricade floor signs</li> <li><input type="checkbox"/> Yellow caution tape</li> <li><input type="checkbox"/> Trash can liner or approved biohazard bag</li> <li><input type="checkbox"/> Trigger sprayer</li> <li><input type="checkbox"/> Scraper</li> <li><input type="checkbox"/> Dust pan</li> <li><input type="checkbox"/> 5-gallon bucket</li> <li><input type="checkbox"/> Hose and nozzle</li> <li><input type="checkbox"/> Wet / Dry vacuum (optional)</li> </ul>
<p><b>Note:</b> Considerations should be given to runoff of the solution. Disinfect first before hosing the area. If runoff is not allowed, dam the affected area with absorbent towels Then wet vacuum the area instead of hosing.</p>

# Carpet Cleaning Standard Operating Procedures



<p><b>Step 1</b></p>	<p>Inspect vacuum cord and plug end for damage. Open the vacuum door or lid to inspect vacuum filter bag. Dump the filter bag into a trash can liner if it is a reusable filter bag. Contain any dust inside the liner. If the bag is not reusable then place it in a trash can liner and place it in a trash container. Replace the filter bag.</p>
<p><b>Step 2</b></p>	<p>Inspect the brush strip or roller bar. You may want to replace the brush strip or roller bar if the bristles are worn. Inspect the vacuum hose and ports of entry for any blocked debris.</p>
<p><b>Step 3</b></p>	<p>Post floor safety sign in area to be vacuumed.</p>
<p><b>Step 4</b></p>	<p>Inspect the area to be vacuumed. Pick up litter, paperclips, and items too large for the vacuum; and place them in the trash. You may want to use a lobby dust pan for larger debris.</p>
<p><b>Step 5</b></p>	<p>Locate an outlet central to the area to be vacuumed. Plug vacuum into a 3-prong outlet.</p> <p><b>Note:</b> Do not use an extension cord that is not compatible with the vacuum. Do not use an extension cord longer than 50’.</p>
<p><b>Step 6</b></p>	<p>Begin vacuuming carpet debris in traffic areas, under desks and in other areas. Start at area nearest the outlet. Use 3 ft. long strokes in a “W” style, working away from outlet. Double check the trash cans to be sure they are empty.</p>
<p><b>Step 7</b></p>	<p>Vacuum at a consistent pace, using a push-pull motion. Use overlap strokes slightly so entire area is cleaned. Continue until the area is completed. Vacuum entrance mats. For small offices or classrooms, you may want to vacuum from the rear as you back out of the room.</p> <p><b>Note:</b> Do not use electrical cords to pull plugs from electrical outlet. Always turn off the vacuum, walk to the outlet, grasp the plug and pull them straight out of the electrical outlet.</p> <p><b>Note:</b> Do not bang the vacuum into building furniture or walls.</p>
<p><b>Step 8</b></p>	<p>Look behind doors, under desks and around the edges. Use the pull out hose with crevice tool to remove debris.</p> <p><b>Note:</b> If the vacuum does not have a pull out hose, then use lobby broom to sweep the debris away from the wall for easy pick up with the vacuum.</p>
<p><b>Step 9</b></p>	<p>Look for any carpet spots. Report them to your supervisor for spot removal procedures.</p>
<p><b>Step 10</b></p>	<p>Check the filter bag frequently and replace it when it’s two-thirds full. Clean the vacuum, wrap cord from the handle of the vacuum to the plug end. Return the vacuum to the storage area.</p>

**Safety Products and Tools**

- Safety floor sign

**Product List**

- Upright vacuum
- Backpack vacuum
- Canister vacuum
- Vacuum filter bags
- Small trash can liners
- Lobby dust pan and broom
- Crevice tool





<p><b>Step 1</b></p>	<p>Put on safety glasses and gloves.</p> <p>Test the spotting products on a scrap piece of carpet first. If no carpet scrap is available, test in an inconspicuous area.</p> <p>Allow test area to completely dry; then check for any color change before proceeding. <b>If there is a color change, do not continue.</b> Pretest additional products until a safe spotting agent is found or call a professional cleaning technician.</p>
<p><b>Step 2</b></p>	<p>Place wet floor sign in area. Remove any dry spills with the use of a spotting brush and bone spatula or dull spoon to scrape up the dry residue. (This process is very efficient for mud, mustard, and ketchup.) Then dry vacuum the area.</p>
<p><b>Step 3</b></p>	<p>Blot up wet spills immediately with a white absorbent cotton cloth or a layer of white paper towels.</p>
<p><b>Step 4</b></p>	<p>The general rule is that unless you know the origin of the spot and have determined that a water-based spotter is required, you should <b>always start</b> with a nonflammable dry solvent-based spotter first and then use a water-based spotter.</p>
<p><b>Step 5</b></p>	<p>Work from the outer edge of the spot toward the center to avoid enlarging the spot. <b>DO NOT</b> pour any dry cleaning solvent - or any other liquid cleaner - directly onto the carpet as this causes penetration into the carpet back, which can produce buckling and deterioration of the backing system.</p>
<p><b>Step 6</b></p>	<p>Pour a small amount of solvent on the white cotton toweling and then gently apply to the spot. Blot the area with a dry white cotton cloth. Work the spot by alternately moistening and blotting. When there is no longer any transfer of the spot substance to the cloth, allow the area to dry thoroughly.</p>
<p><b>Step 7</b></p>	<p>If the spot remains after using the dry cleaning solvent, then work the spot with a water-based general purpose spotter, using the same moistening and blotting procedures. Follow the same steps as you did with the dry cleaning solvent.</p>
<p><b>Step 8</b></p>	<p>When the stain has been removed, completely rinse the area with tap water to remove spotting agents. Immediately rinse &amp; vacuum with portable spotting machine. Blot with a cotton cloth until the moisture is absorbed. Contact a certified carpet technician if spot persists.</p>

**Safety Products and Tools**

- Nitrile gloves
- Safety glasses, goggles or face shield
- Wet floor signs

**Product List**

- Portable spotting machine
- Wet / dry vacuum
- White cotton cleaning cloths
- Water-based all-purpose spotter
- Solvent-based spotter
- Spotting brush
- Spotting kit
- Spotter chart
- Bone spatula or dull spoon
- SDS sheet for spotting chemicals



Procedure No. CSOP C102	<b>Carpet Bonnet Procedure</b>
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<b>Step 1</b>	Gather supplies and equipment.
<b>Step 2</b>	Post wet floor signs. Vacuum thoroughly.
<b>Step 3</b>	Remove obstructions and furniture from the area to be cleaned.
<b>Step 4</b>	Fill 2-gallon pump-up sprayer with warm water. Mix bonnet cleaner or encapsulation cleaner in a pump-up sprayer. Follow mixing directions.
<b>Step 5</b>	Remove spots.
<b>Step 6</b>	Apply the bonnet solution using pump up sprayer to a 10' x 20' area. Hold the nozzle of the sprayer at least 12" above the carpet pile.  Allow chemical to dwell for 5 minutes.
<b>Step 7</b>	Fill bucket and wringer with cool water.
<b>Step 8</b>	Place bonnet in bucket and wring out.
<b>Step 9</b>	Tip floor machine back and mount drive block. Plug in floor machine. Lay the moist bonnet on the carpet that was pre-sprayed and center the drive block over it.
<b>Step 10</b>	Work the machine and bonnet over the carpet using overlapping, circular motions. As one side of the pad becomes dirty, flip it over to the clean side.
<b>Step 11</b>	When both sides are soiled, rinse bonnet in clean water, wring out, and reuse.
<b>Step 12</b>	Allow carpet to thoroughly dry before removing wet floor signs and opening to traffic.
<b>Step 13</b>	Clean all equipment and tools. Return them to supply area.

<b>Safety Tools</b>
<input type="checkbox"/> Gloves <input type="checkbox"/> Safety glasses or goggles <input type="checkbox"/> Wet floor signs

<b>Product Checklist</b>
<input type="checkbox"/> Vacuum cleaner <input type="checkbox"/> 175 RPM floor machine with drive block <input type="checkbox"/> Bonnets <input type="checkbox"/> 2-gallon pump-up sprayer <input type="checkbox"/> Wet floor signs <input type="checkbox"/> 4-gallon bucket and wringer <input type="checkbox"/> White cotton cleaning cloths <input type="checkbox"/> Personal protective equipment (rubber gloves, eye protection) <input type="checkbox"/> Bonnet or encapsulation chemical <input type="checkbox"/> Water-based all-purpose spotter <input type="checkbox"/> Tar, grease and oil spot remover <input type="checkbox"/> Aluminum foil squares <input type="checkbox"/> Spotting brush <input type="checkbox"/> Spotting kit (optional) <input type="checkbox"/> 2 - 5 gallon buckets



Procedure No. CSOP C103	Encapsulation Interim Carpet Care Standard Operating Procedure (SOP)
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Step 1	Put on personal protective equipment (PPE).
Step 2	Inspect and install the proper brushes on interim carpet machine.
Step 3	Inspect power cable for cuts and abrasions to the cord. Be sure the three-prong grounded plug end is not broken or removed.
Step 4	Add two gallons of clean water to the solution tank. Add one bottle of CRYSTAL DRY® Extra encapsulating chemistry.
Step 5	Connect power cable to a grounded receptacle.
Step 6	<p><b>Light Soil Cleaning Application</b></p> <ol style="list-style-type: none"> <li>Turn on the machine.</li> <li>Operate machine by pulling solution control handle on forward 'wet' pass, and release solution handle on backward 'dry' pass.</li> <li>Operate the machine similar to the motion of a lawn mower.</li> <li>Make long, straight passes with solution control handle engaged.</li> <li>Release the handle at the end of the pass as you turn the machine back in opposite direction.</li> <li>Overlap your passes by 1-2 inches to avoid streaking.</li> </ol> <p><b>Heavy Soil Cleaning Application</b> Use 3-ft. long strokes in a "W" style, working away from outlet. Overlap each forward pass by 1- 2" or more. <i>The cleaning pattern is similar to the pattern used with an upright vacuum cleaner.</i></p>
Step 7	Unplug power cable from receptacle before attempting to refill solution tank when it is empty. Repeat Steps 4-6.
Step 8	When finished using machine, unplug power cable from receptacle. Wrap cord from the handle of the machine to the plug end. <b>Tip:</b> use absorbent cloth to wipe power cable while winding it. This will clean and dry the power cable.
Step 9	Remove clean water solution tank. Empty and rinse it with clean water. Replace solution tank.
Step 10	<ol style="list-style-type: none"> <li>Tip machine backward onto its handle.</li> <li>Remove cylindrical brushes.</li> <li>Wipe underside of machine and brush axles.</li> <li>Rotate brushes end-to-end and replace on the machine.</li> <li>Stand machine upright.</li> <li>Remove and empty collection hopper.</li> <li>Replace collection hopper.</li> </ol>
Step 11	Return the machine and tools to the storage area.

<p><b>Safety Products</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Nitrile gloves</li> <li><input type="checkbox"/> Safety glasses</li> <li><input type="checkbox"/> Wet floor signs</li> </ul>
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<p><b>Product List</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Interim carpet machine</li> <li><input type="checkbox"/> Brushes appropriate for carpet to be cleaned. Consult Operator's Manual if uncertain.</li> <li><input type="checkbox"/> Encapsulation chemical.</li> <li><input type="checkbox"/> Minimum of one 5-gallon buddy jug for each 10,000 sq. ft. of carpet to be cleaned</li> <li><input type="checkbox"/> White absorbent cloth or paper towels</li> </ul>
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## Carpet Wet Extraction Procedure

<b>Step 1</b>	Gather supplies and equipment.
<b>Step 2</b>	Post wet floor signs. Vacuum thoroughly.
<b>Step 3</b>	Remove obstructions and furniture from the area to be cleaned.
<b>Step 4</b>	Fill 2-gallon pump-up sprayer with warm water. Mix traffic lane cleaner in a pump-up sprayer. Follow mixing directions.
<b>Step 5</b>	Remove spots.
<b>Step 6</b>	Apply the pre-spray solution using pump up sprayer to a 10' x 20' area. Hold the nozzle of the sprayer at least 12" above the carpet pile. Allow chemical to dwell for 5-10 minutes.
<b>Step 7</b>	Fill the extractor with hot water <b>DO NOT</b> exceed 150 degrees. Mix extraction solution. Follow mixing directions.
<b>Step 8</b>	Plug in the machine. Operate the extractor by walking backwards and pulling while dispensing the hot water and picking it up with the vacuum head. Overlap each pass to insure thorough cleaning.
<b>Step 9</b>	To prevent rust and stains when replacing furniture, use aluminum foil squares
<b>Step 10</b>	Allow carpet to thoroughly dry before removing wet floor signs and opening to traffic.
<b>Step 11</b>	Place carpet blowers in clean areas to speed the drying process.
<b>Step 12</b>	Rinse recovery tank with clean water.
<b>Step 13</b>	Clean all equipment and tools. Return them to supply area.

### Safety Tools

- Gloves
- Safety glasses or goggles
- Wet floor signs

### Product Checklist

- Vacuum cleaner
- Extractor - self-contained or box type
- Carpet blower / dryer
- 2-gallon pump-up sprayer
- White cotton cleaning cloths
- Personal protective equipment (rubber gloves, eye protection)
- Extraction chemical
- Traffic lane chemical
- Water-based all-purpose spotter
- Tar, grease and oil spot remover
- Defoamer
- Aluminum foil squares
- Egg timer
- Spotting brush
- Spotting kit (optional)
- 2 - 5 gallon buckets



Procedure CSOP C105	Gum Removal - Carpet Standard Operating Procedure (SOP)
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Step 1	Put on safety glasses and gloves.
Step 2	<p>Test the spotting products on a scrap piece of carpet first. If no carpet scrap is available, test in an inconspicuous area.</p> <p>Allow test area to completely dry; then check for any color change before proceeding. <b>If there is a color change, do not continue.</b> Pretest additional products until a safe spotting agent is found or call a professional cleaning technician.</p>
Step 3	Place wet floor sign in area.
Step 4	<p>Place several ice cubes in a resealable plastic bag and lay the bag on top of the gum wad. Alternatively, spraying the gum at close range with compressed air from a computer duster, or a commercial gum remover, will be effective at freezing the gum.</p> <p>Freezing gum is most successful when the gum has just gotten into the carpet and is not ground deeply into the carpet fibers.</p> <p>Be sure the gum is frozen solid and not just cold before moving on to the next steps.</p>
Step 5	<p>Use a bone knife or dull spoon to scrape the frozen gum off the carpet. Gently lift the gum up off of the carpet fibers with a scraping motion.</p> <p>Allow it to crack and break into fragments and remove as much as possible. Rub ice over stubborn areas that won't lift off and repeat as necessary.</p>
Step 6	Clean the spot to remove any remaining residues with a solvent-based spotter. Gently rub the spot where the gum was to finish the cleaning process. Blot dry with a white cleaning cloth. Don't walk on the area until it is completely dry.
Step 7	Remove floor safety sign from the area.
Step 8	Return all tools to the storage closet. Clean tools and place them in their proper place.
Step 9	Remove PPE and wash your hands thoroughly.

<h3>Safety Tools</h3>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Nitrile gloves</li> <li><input type="checkbox"/> Safety glasses, goggles or face shield</li> <li><input type="checkbox"/> Wet floor signs</li> </ul>

<h3>Product Checklist</h3>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Aerosol gum remover</li> <li><input type="checkbox"/> Resealable bag</li> <li><input type="checkbox"/> Ice</li> <li><input type="checkbox"/> White cotton cleaning cloths</li> <li><input type="checkbox"/> Solvent-based spotter</li> <li><input type="checkbox"/> Spotting brush</li> <li><input type="checkbox"/> Bone spatula or dull spoon</li> <li><input type="checkbox"/> SDS sheet for spotting chemicals</li> </ul>



# Electrostatic Sprayer Standard Operating Procedures



## Periodic Locker Room Sanitation

<b>Step 1</b>	Put on personal protective equipment (PPE).
<b>Step 2</b>	Collect tools and equipment and proceed to the locker room.
<b>Step 3</b>	<p><b>Gross Soil Removal:</b> Inspect all surfaces and fixtures for gross soil and debris on lockers, benches, mirrors, shelves, walls, chairs, stools, tables, sinks, mirrors, drawers, floors and all highly touched objects.</p> <ol style="list-style-type: none"> <li>Post wet floor signs</li> <li>Remove gross soils using a trigger sprayer with general purpose cleaner and a microfiber cloth.</li> <li>Dust mop or sweep floor area and remove any debris, i.e., paper, gross soil, dirt, gum, etc.</li> <li>Wet mop floor using a bucket, wringer and mop to remove dry or wet debris on the floor.</li> </ol>
<b>Step 4</b>	Be sure the electrostatic sprayer battery is fully charged. Only use a Victory Innovations charger.
<b>Step 5</b>	<ol style="list-style-type: none"> <li>Fill the tank by first removing it from the unit by rotating the tank locking collar and pulling the tank release ring under the trigger. The tank can now be removed. <b>Note:</b> You must hold on to the tank when you pull the tank release ring, or the tank will fall to the floor.</li> <li>Fill the tank with approved EPA registered disinfectant or sanitizer.</li> <li>Align the tank grooves into the slide rail and lower the machine onto the tank.</li> <li>Rotate the tank locking collar until you hear the click of the tank release ring snap into place.</li> <li>Insert the charged battery into the battery socket and lock in place.</li> <li>To insure maximized electrostatic performance, always keep your hand firmly wrapped around the handle in contact with the grounding strap.</li> <li>Pull the trigger to test that the spray nozzle is functioning.</li> </ol>
<b>Step 6</b>	Spray all the surfaces and highly touched objects from top to bottom (spray 24" distance from all objects). Refill the tank as necessary. <b>Note:</b> No rinsing is required.
<b>Step 7</b>	<ol style="list-style-type: none"> <li>After all areas and fixtures have been sanitized, remove the battery from the sprayer and place it in the approved charger.</li> <li>Disconnect storage tank from sprayer.</li> <li>Rinse out the tank.</li> <li>Mount the empty tank back onto the sprayer.</li> </ol>
<b>Step 8</b>	Return supplies to closet. Remove gloves and glasses.
<b>Step 9</b>	Thoroughly wash your hands.

### Safety Tools

- Gloves
- Safety glasses or goggles
- Wet floor signs

### Product Checklist

- Electrostatic sprayer with battery and charger
- EPA registered disinfectant or sanitizer.
- Microfiber cleaning cloths
- Dilution control center
- Manual trigger sprayer
- All-purpose cleaner
- Dust mop
- Lobby dustpan and broom
- Bucket with wringer
- Wet mop with handle
- Wet floor sign

#### Note:

- All products must be used in accordance with the manufacturers' directions.
- Review the SDS sheet of all chemicals used in the workplace.
- Only use attachments recommended or sold by the manufacturer.
- Remove the nozzle if it becomes clogged and soak it in vinegar to remove hard water and chemical residue.
- Do not use the electrostatic sprayer when children are present.



## Periodic Weight Room Sanitation

<b>Step 1</b>	Put on personal protective equipment (PPE).
<b>Step 2</b>	Collect tools and equipment and proceed to the weight room.
<b>Step 3</b>	<p><b>Gross Soil Removal:</b> Inspect all surfaces, benches, weight machines, barbell stands, barbells, dumbbells, treadmills, stair machines, rowing machines, elliptical machines, all exercise equipment and all highly touched objects for gross soil and body perspiration.</p> <p>a. Post wet floor signs. b. Remove gross soils using a trigger sprayer with general purpose cleaner and a microfiber cloth. c. Dust mop, sweep or vacuum the weight room floor area and remove any debris, i.e., paper, gross soil, dirt, gum, hand chalk, etc. d. Wet mop floor using a bucket, wringer and mop to remove dry or wet debris on the floor.</p>
<b>Step 4</b>	Be sure the electrostatic sprayer battery is fully charged. Only use a Victory Innovations charger.
<b>Step 5</b>	<p>a. Fill the tank by first removing it from the unit by rotating the tank locking collar and pulling the tank release ring under the trigger. The tank can now be removed. <b>Note:</b> You must hold on to the tank when you pull the tank release ring, or the tank will fall to the floor. b. Fill the tank with EPA registered disinfectant or sanitizer. Align the tank grooves into the slide rail and lower the machine onto the tank. c. Rotate the tank locking collar until you hear the click of the tank release ring snap into place. d. Insert the charged battery into the battery socket and lock in place. e. To insure maximized electrostatic performance, always keep your hand firmly wrapped around the handle in contact with the grounding strap. f. Pull the trigger to test that the spray nozzle is functioning.</p>
<b>Step 6</b>	Spray all the surfaces and highly touched objects from top to bottom (spray 24" distance from all objects). Refill the tank as necessary. <b>Note:</b> Avoid spraying sanitizer on windows and mirrors. No rinsing is required.
<b>Step 7</b>	<p>a. After all areas and fixtures have been sanitized, remove the battery from the sprayer and place it in the approved charger. b. Disconnect storage tank from sprayer. c. Rinse out the tank. d. Mount the empty tank back onto the sprayer.</p>
<b>Step 8</b>	Return supplies to closet. Remove gloves and glasses.
<b>Step 9</b>	Thoroughly wash your hands.

### Safety Tools

- Gloves
- Safety glasses or goggles
- Wet floor signs

### Product Checklist

- Electrostatic sprayer with battery and charger
- EPA registered disinfectant or sanitizer.
- Microfiber cleaning cloths
- Dilution control center
- Manual trigger sprayer
- All-purpose cleaner
- Dust mop
- Lobby dustpan and broom
- Bucket with wringer
- Wet mop with handle
- Wet floor sign
- Backpack vacuum – battery or corded

#### Note:

1. All products must be used in accordance with the manufacturers' directions.
2. Review the SDS sheet of all chemicals used in the workplace.
3. Only use attachments recommended or sold by the manufacturer.
4. Remove the nozzle if it becomes clogged and soak it in vinegar to remove hard water and chemical residue.
5. Do not use the electrostatic sprayer when children are present.





## Periodic Athletic Bus Sanitation

<b>Step 1</b>	Put on personal protective equipment (PPE).
<b>Step 2</b>	Collect tools and equipment and proceed to the bus.
<b>Step 3</b>	<p><b>Gross Soil Removal:</b> Inspect all surfaces and fixtures for gross soil and debris on the floor, seats, ledges, seat belts, wheelchair restraints, stair rail handles, ceilings, kick panels, walls and all highly touched objects.</p> <p>a. Remove gross soils using a trigger sprayer with general purpose cleaner and a microfiber cloth. b. Sweep floor area or vacuum to remove any dry debris, i.e., paper, gross soil, dirt, gum, etc. c. Wet mop floor using a bucket, wringer and mop to remove dry or wet debris on the floor.</p>
<b>Step 4</b>	Be sure the electrostatic sprayer battery is fully charged. Only use a Victory Innovations charger.
<b>Step 5</b>	<p>a. Fill the tank by first removing it from the unit by rotating the tank locking collar and pulling the tank release ring under the trigger. The tank can now be removed. <b>Note:</b> You must hold on to the tank when you pull the tank release ring, or the tank will fall to the floor. b. Fill the tank with EPA registered disinfectant or sanitizer. c. Align the tank grooves into the slide rail, and lower the machine onto the tank. d. Rotate the tank locking collar until you hear the click of the tank release ring snap into place. e. Insert the charged battery into the battery socket and lock in place. f. To insure maximized electrostatic performance, always keep your hand firmly wrapped around the handle in contact with the grounding strap. g. Pull the trigger to test that the spray nozzle is functioning.</p>
<b>Step 6</b>	Spray all the interior bus surfaces and highly touched objects from top to bottom (spray 24" distance from all objects). Refill the tank as necessary. <b>Note:</b> Avoid spraying sanitizer on windows and mirrors. No rinsing is required.
<b>Step 7</b>	<p>a. Clean any over spray from the glass windows using a glass cleaner and a microfiber cloth. b. After all areas and fixtures have been sanitized, remove the battery from the sprayer and place it in the approved charger. c. Disconnect storage tank from sprayer. d. Rinse out the tank. e. Mount the empty tank back onto the sprayer.</p>
<b>Step 8</b>	Return supplies to closet. Remove gloves and glasses.
<b>Step 9</b>	Thoroughly wash your hands.

### Safety Tools

- Gloves
- Safety glasses or goggles

### Product Checklist

- Electrostatic sprayer with battery and charger
- EPA registered disinfectant or sanitizer.
- Microfiber cleaning cloths
- Dilution control center
- Manual trigger sprayer
- All-purpose cleaner
- Glass cleaner
- Bucket with wringer
- Wet mop with handle
- Lobby dustpan and broom
- Gum remover
- 1" scraper

#### Note:

1. All products must be used in accordance with the manufacturers' directions.
2. Review the SDS sheet of all chemicals used in the workplace.
3. Only use attachments recommended or sold by the manufacturer.
4. Remove the nozzle if it becomes clogged and soak it in vinegar to remove hard water and chemical residue.
5. Do not use the electrostatic sprayer when children are present.



## Periodic Shower Sanitation

<b>Step 1</b>	Put on personal protective equipment (PPE).
<b>Step 2</b>	Collect tools and equipment and proceed to the shower area.
<b>Step 3</b>	<p><b>Gross Soil Removal:</b> Inspect all surfaces and fixtures for gross soil and debris. If hard water deposits, soap scum and visible debris are present in the shower area, you may need to clean the area with a foam gun and garden hose.</p> <ol style="list-style-type: none"> <li>Place floor signs outside shower area.</li> <li>Remove dry debris with a lobby dustpan and broom.</li> <li>Fill the foam gun tank with a mild acid shower cleaner.</li> <li>Connect garden hose to a water source.</li> <li>Connect the foam gun to the garden hose.</li> <li>Turn on the water and foam down the shower area from top to bottom.</li> <li>Allow chemical to dwell for 5 minutes.</li> <li>Turn the knob on the foam gun to rinse. Rinse the walls and floors with clean water.</li> <li>Squeegee excess water into the floor drain.</li> <li>Remove the foam gun and hose from the shower areas and let dry.</li> </ol>
<b>Step 4</b>	Be sure the electrostatic sprayer battery is fully charged. Only use a Victory Innovations charger.
<b>Step 5</b>	<ol style="list-style-type: none"> <li>Fill the tank by first removing it from the unit by rotating the tank locking collar and pulling the tank release ring under the trigger. The tank can now be removed. <b>Note:</b> You must hold on to the tank when you pull the tank release ring, or the tank will fall to the floor.</li> <li>Fill the tank with EPA registered disinfectant or sanitizer.</li> <li>Align the tank grooves into the slide rail and lower the machine onto the tank.</li> <li>Rotate the tank locking collar until you hear the click of the tank release ring snap into place.</li> <li>Insert the charged battery into the battery socket and lock in place.</li> <li>To insure maximized electrostatic performance, always keep your hand firmly wrapped around the handle in contact with the grounding strap.</li> <li>Pull the trigger to test that the spray nozzle is functioning.</li> </ol>
<b>Step 6</b>	Spray all shower surfaces and highly touched objects from top to bottom (spray 24" distance from all objects). Refill the tank as necessary. <b>Note:</b> No rinsing is required.
<b>Step 7</b>	<ol style="list-style-type: none"> <li>After all areas and fixtures have been sanitized, remove the battery from the sprayer and place it in the approved charger.</li> <li>Disconnect storage tank from sprayer.</li> <li>Rinse out the tank.</li> <li>Mount the empty tank back onto the sprayer.</li> </ol>
<b>Step 8</b>	Return supplies to closet. Remove gloves and glasses.
<b>Step 9</b>	Thoroughly wash your hands.

### Safety Tools

- Gloves
- Safety glasses or goggles
- Wet floor signs

### Product Checklist

- Electrostatic sprayer with battery and charger
- EPA registered disinfectant or sanitizer.
- Mild acid shower cleaner
- Dilution control center
- Wet floor sign
- Foam gun
- Garden hose
- Lobby dustpan and broom
- Microfiber cloth

#### Note:

- All products must be used in accordance with the manufacturers' directions.
- Review the SDS sheet of all chemicals used in the workplace.
- Only use attachments recommended or sold by the manufacturer.
- Remove the nozzle if it becomes clogged and soak it in vinegar to remove hard water and chemical residue.
- Do not use the electrostatic sprayer when children are present.



## Periodic Training Room Sanitation

<b>Step 1</b>	Put on personal protective equipment (PPE).
<b>Step 2</b>	Collect tools and equipment and proceed to the training room.
<b>Step 3</b>	<p><b>Gross Soil Removal:</b> Inspect all surfaces and fixtures for gross soil and debris. Clean tables, benches, sinks, mirrors, folding tables, shelves, floors surfaces, stools, chairs, couches, phones and all highly touched objects.</p> <ol style="list-style-type: none"> <li>Remove gross soils using a trigger sprayer with general purpose cleaner and a microfiber cloth.</li> <li>Post wet floor signs.</li> <li>Dust mop, sweep or vacuum the floor area and remove any debris, i.e., paper, gross soil, dirt, gum, etc.</li> <li>Wet mop floor using a bucket, wringer and mop to remove dry or wet debris on the floor.</li> </ol>
<b>Step 4</b>	Be sure the electrostatic sprayer battery is fully charged. Only use a Victory Innovations charger.
<b>Step 5</b>	<ol style="list-style-type: none"> <li>Fill the tank by first removing it from the unit by rotating the tank locking collar and pulling the tank release ring under the trigger. The tank can now be removed. <b>Note:</b> You must hold on to the tank when you pull the tank release ring, or the tank will fall to the floor.</li> <li>Fill the tank with EPA registered disinfectant or sanitizer.</li> <li>Align the tank grooves into the slide rail, and lower the machine onto the tank.</li> <li>Rotate the tank locking collar until you hear the click of the tank release ring snap into place.</li> <li>Insert the charged battery into the battery socket and lock in place.</li> <li>To insure maximized electrostatic performance, always keep your hand firmly wrapped around the handle in contact with the grounding strap.</li> <li>Pull the trigger to test that the spray nozzle is functioning.</li> </ol>
<b>Step 6</b>	Spray all the surfaces and highly touched objects from top to bottom (spray 24" distance from all objects). Refill the tank as necessary. <b>Note:</b> Avoid spraying sanitizer on windows and mirrors. No rinsing is required.
<b>Step 7</b>	<ol style="list-style-type: none"> <li>Clean any over spray from the glass windows using a glass cleaner and a microfiber cloth.</li> <li>After all areas and fixtures have been sanitized, remove the battery from the sprayer and place it in the approved charger.</li> <li>Disconnect storage tank from sprayer.</li> <li>Rinse out the tank.</li> <li>Mount the empty tank back onto the sprayer.</li> </ol>
<b>Step 8</b>	Return supplies to closet. Remove gloves and glasses.
<b>Step 9</b>	Thoroughly wash your hands.

### Safety Tools

- Gloves
- Safety glasses or goggles
- Wet floor signs

### Product Checklist

- Electrostatic sprayer with battery and charger
- Fill the tank with EPA registered disinfectant or sanitizer.
- Microfiber cleaning cloths
- Dilution control center
- Manual trigger sprayer
- All-purpose cleaner
- Glass cleaner
- Bucket with wringer
- Wet mop with handle
- Lobby dust pan and broom
- Gum remover
- 1" scraper

#### Note:

- All products must be used in accordance with the manufacturers' directions.
- Review the SDS sheet of all chemicals used in the workplace.
- Only use attachments recommended or sold by the manufacturer.
- Remove the nozzle if it becomes clogged and soak it in vinegar to remove hard water and chemical residue.
- Do not use the electrostatic sprayer when children are present.



## Periodic Trainer Room Sanitation

<b>Step 1</b>	Put on personal protective equipment (PPE).
<b>Step 2</b>	Collect tools and equipment and proceed to the training room.
<b>Step 3</b>	<p><b>Gross Soil Removal:</b> Inspect all surfaces and fixtures for gross soil and debris on lockers, benches, mirrors, shelves, walls, chairs, stools, tables, sinks, mirrors, drawers, floors and all highly touched objects.</p> <ol style="list-style-type: none"> <li>Post wet floor signs.</li> <li>Remove gross soils using a trigger sprayer with general purpose cleaner and a microfiber cloth.</li> <li>Dust mop, sweep or vacuum the floor area and remove any debris, i.e., paper, gross soil, dirt, gum, etc.</li> <li>Wet mop floor using a bucket, wringer and mop to remove dry or wet debris on the floor.</li> </ol>
<b>Step 4</b>	Be sure the electrostatic sprayer battery is fully charged. Only use a Victory Innovations charger.
<b>Step 5</b>	<ol style="list-style-type: none"> <li>Fill the tank by first removing it from the unit by rotating the tank locking collar and pulling the tank release ring under the trigger. The tank can now be removed. <b>Note:</b> You must hold on to the tank when you pull the tank release ring, or the tank will fall to the floor.</li> <li>Fill the tank with EPA registered disinfectant or sanitizer.</li> <li>Align the tank grooves into the slide rail, and lower the machine onto the tank.</li> <li>Rotate the tank locking collar until you hear the click of the tank release ring snap into place.</li> <li>Insert the charged battery into the battery socket and lock in place.</li> <li>To insure maximized electrostatic performance, always keep your hand firmly wrapped around the handle in contact with the grounding strap.</li> <li>Pull the trigger to test that the spray nozzle is functioning.</li> </ol>
<b>Step 6</b>	Spray all the surfaces and highly touched objects from top to bottom (spray 24" distance from all objects). Refill the tank as necessary. <b>Note:</b> Avoid spraying electronic measuring machines. No rinsing is required.
<b>Step 7</b>	<ol style="list-style-type: none"> <li>After all areas and fixtures have been sanitized, remove the battery from the sprayer and place it in the approved charger.</li> <li>Disconnect storage tank from sprayer.</li> <li>Rinse out the tank.</li> <li>Mount the empty tank back onto the sprayer.</li> </ol>
<b>Step 8</b>	Return supplies to closet. Remove gloves and glasses.
<b>Step 9</b>	Thoroughly wash your hands.

### Safety Tools

- Gloves
- Safety glasses or goggles
- Wet floor signs

### Product Checklist

- Electrostatic sprayer with battery and charger
- EPA registered disinfectant or sanitizer
- Microfiber cleaning cloths
- Dilution control center
- Manual trigger sprayer
- All-purpose cleaner
- Dust mop
- Bucket with wringer
- Wet mop with handle
- Wet floor sign
- Corded or battery backpack vacuum

#### Note:

- All products must be used in accordance with the manufacturers' directions.
- Review the SDS sheet of all chemicals used in the workplace.
- Only use attachments recommended or sold by the manufacturer.
- Remove the nozzle if it becomes clogged and soak it in vinegar to remove hard water and chemical residue.
- Do not use the electrostatic sprayer when children are present.



## Periodic Wrestling Mat Sanitation

<b>Step 1</b>	Put on personal protective equipment (PPE).
<b>Step 2</b>	Collect tools and equipment and proceed to the wrestling room.
<b>Step 3</b>	<p><b>Gross Soil Removal:</b></p> <ol style="list-style-type: none"> <li>Unroll the mats and place them on the floor.</li> <li>Post wet floor signs.</li> <li>Inspect all surfaces for gross soil and debris.</li> <li>Dry dust mop the mats. Remove dry debris with a dustpan and counter brush.</li> <li>Mix all purpose cleaner or disinfectant in a bucket with a wringer.</li> <li>Wet mop floor using a bucket, wringer and mop.</li> <li>Allow the mats to dry.</li> </ol>
<b>Step 4</b>	Be sure the electrostatic sprayer battery is fully charged. Only use a Victory Innovations charger.
<b>Step 5</b>	<ol style="list-style-type: none"> <li>Fill the tank by first removing it from the unit by rotating the tank locking collar and pulling the tank release ring under the trigger. The tank can now be removed. <b>Note:</b> You must hold on to the tank when you pull the tank release ring, or the tank will fall to the floor.</li> <li>Fill the tank with EPA registered disinfectant or sanitizer.</li> <li>Align the tank grooves into the slide rail, and lower the machine onto the tank.</li> <li>Rotate the tank locking collar until you hear the click of the tank release ring snap into place.</li> <li>Insert the charged battery into the battery socket and lock in place.</li> <li>To insure maximized electrostatic performance, always keep your hand firmly wrapped around the handle in contact with the grounding strap.</li> <li>Pull the trigger to test that the spray nozzle is functioning.</li> </ol>
<b>Step 6</b>	<ol style="list-style-type: none"> <li>Clean the bottom of your shoes with a cleaner and microfiber cloth. Place the cloth on the floor at the edge of the mat.</li> <li>Spray all mats from the center to the outside edges. Do not walk on the areas of the mats. Refill the tank as necessary.</li> <li><b>Note:</b> Mats should be cleaned and sanitized before and after each practice and before and after each match. No rinsing is required.</li> </ol>
<b>Step 7</b>	<ol style="list-style-type: none"> <li>After all mats have been sanitized, remove the battery from the sprayer and place it in the approved charger.</li> <li>Disconnect storage tank from sprayer.</li> <li>Rinse out the tank.</li> <li>Mount the empty tank back onto the sprayer.</li> </ol>
<b>Step 8</b>	Return supplies to closet. Remove gloves and glasses.
<b>Step 9</b>	Thoroughly wash your hands.

### Safety Tools

- Gloves
- Safety glasses or goggles
- Wet floor signs

### Product Checklist

- Electrostatic sprayer with battery and charger
- EPA registered disinfectant or sanitizer.
- Microfiber cleaning cloths
- Dilution control center
- Manual trigger sprayer
- All-purpose cleaner
- Dust mop
- Dustpan and counter brush
- Bucket with wringer
- Wet mop with handle
- Wet floor sign

#### Note:

- All products must be used in accordance with the manufacturers' directions.
- Review the SDS sheet of all chemicals used in the workplace.
- Only use attachments recommended or sold by the manufacturer.
- Remove the nozzle if it becomes clogged and soak it in vinegar to remove hard water and chemical residue.
- Do not use the electrostatic sprayer when children are present.



## Periodic Restroom Sanitation

<b>Step 1</b>	Put on personal protective equipment (PPE).
<b>Step 2</b>	Collect tools and equipment and proceed to the restroom.
<b>Step 3</b>	<p><b>Gross Soil Removal:</b> Inspect all surfaces and fixtures for gross soil and debris on toilets, urinals, partitions, counters, mirrors, floors, door handles, levers, dispensers and all highly touched objects.</p> <ol style="list-style-type: none"> <li>Post wet floor signs.</li> <li>Remove gross soils using a trigger sprayer with a disinfectant cleaner and a microfiber cloth. Clean from top to bottom. Dry before wet.</li> <li>Dust mop or sweep floor area and remove any debris, i.e., paper, gross soil, dirt, gum, etc.</li> <li>Wet mop floor using a bucket, wringer and mop to remove dry or wet debris on the floor.</li> </ol>
<b>Step 4</b>	Be sure the electrostatic sprayer battery is fully charged. Only use a Victory Innovations charger.
<b>Step 5</b>	<ol style="list-style-type: none"> <li>Fill the tank by first removing it from the unit by rotating the tank locking collar and pulling the tank release ring under the trigger. The tank can now be removed. <b>Note:</b> You must hold on to the tank when you pull the tank release ring, or the tank will fall to the floor.</li> <li>Fill the tank with EPA registered disinfectant or sanitizer.</li> <li>Align the tank grooves into the slide rail and lower the machine onto the tank.</li> <li>Rotate the tank locking collar until you hear the click of the tank release ring snap into place.</li> <li>Insert the charged battery into the battery socket and lock in place.</li> <li>To insure maximized electrostatic performance, always keep your hand firmly wrapped around the handle in contact with the grounding strap.</li> <li>Pull the trigger to test that the spray nozzle is functioning.</li> </ol>
<b>Step 6</b>	Spray all the surfaces and highly touched objects from top to bottom in the restroom (spray 24" distance from all objects). Refill the tank as necessary. <b>Note:</b> No rinsing is required.
<b>Step 7</b>	<ol style="list-style-type: none"> <li>After all areas and fixtures have been sanitized, remove the battery from the sprayer and place it in the approved charger.</li> <li>Disconnect storage tank from sprayer.</li> <li>Rinse out the tank.</li> <li>Mount the empty tank back onto the sprayer.</li> </ol>
<b>Step 8</b>	Return supplies to closet. Remove gloves and glasses.
<b>Step 9</b>	Thoroughly wash your hands.

### Safety Tools

- Gloves
- Safety glasses or goggles
- Wet floor signs

### Product Checklist

- Electrostatic sprayer with battery and charger
- EPA registered disinfectant or sanitizer.
- Microfiber cleaning cloths
- Dilution control center
- Manual trigger sprayer
- Dust mop
- Bucket with wringer
- Wet mop with handle
- Wet floor sign

#### Note:

- All products must be used in accordance with the manufacturers' directions.
- Review the SDS sheet of all chemicals used in the workplace.
- Only use attachments recommended or sold by the manufacturer.
- Remove the nozzle if it becomes clogged and soak it in vinegar to remove hard water and chemical residue.
- Do not use the electrostatic sprayer when children are present.



## Periodic Indoor / Outdoor Turf Sanitation

<b>Step 1</b>	Put on personal protective equipment (PPE).
<b>Step 2</b>	Collect tools and equipment and proceed to the area.
<b>Step 3</b>	<b>Gross Soil Removal:</b> Inspect all turf surfaces for gross soil and debris. Remove debris from the turf and place it in a trash can.
<b>Step 4</b>	<ul style="list-style-type: none"> <li>a. Fill the ATV / Gator polyethylene agricultural sprayers with an EPA registered disinfectant or sanitizer using a dilution control center.</li> <li>b. Drop the sprayer bars in position.</li> <li>c. Turn the sprayer on.</li> <li>d. Drive the ATV / Gator at 5-6 MPH applying the sanitizer evenly. Use systematic over lapping passes or a figure eight pattern over the turf field.</li> <li>e. Refill the tank as necessary.</li> </ul>
<b>Step 5</b>	<ul style="list-style-type: none"> <li>a. After turf has been sanitized, empty and rinse the polyethylene agricultural spray tank with cold water.</li> <li>b. Fill the tank with a gallon of clean rinse water.</li> <li>c. Flush the jets and jet bars with cold water.</li> <li>d. Fold the spray bars into the storage position</li> <li>e. Disconnect tank from the ATV / Gator.</li> <li>f. Return the tank to the storage area.</li> </ul>
<b>Step 6</b>	Remove gloves and glasses.
<b>Step 7</b>	Thoroughly wash your hands.

### Safety Tools

- Gloves
- Safety glasses or goggles

### Product Checklist

- ATV / Gator
- Polyethylene agricultural sprayers with spray bars
- Fill the tank with EPA registered disinfectant or sanitizer.
- Microfiber cleaning cloths
- Dilution control center

#### Note:

1. All products must be used in accordance with the manufacturers' directions.
2. Review the SDS sheet of all chemicals used in the workplace.
3. Only use attachments recommended or sold by the manufacturer.
4. Remove the spray arm nozzle if it becomes clogged and soak it in vinegar to remove hard water and chemical residue.
5. Do not use the sprayer when children are present.





1 PLAINFIELD PUBLIC SCHOOLS OFFICE OF FACILITIES AND GROUNDS  
SOP 01.00

**Fire, Environmental, Safety & Health (FESH) Committee**

- 1.0 Purpose of the Committee.** In accordance with the Mission Statement and Plainfield Public School Policy as given in SOP 01.00, a Fire, Environmental, Safety and Health (FESH) Committee shall be appointed to direct and control all aspects of FESH concerns. The Committee shall:
- 1.1 Establish safety rules and regulations and appoint sub-committee as needed to ensure the safety and health of all employees.
  - 1.2 Be empowered to enforce their decisions. All personal shall abide by the rules that are established by the committee and approved by the Plainfield Board of Education.
  - 1.3 Set a monthly meeting schedule and an agenda for each meeting (See SOP 01.01). Post via email the time of the meeting one week before the meeting is to be held. Encourage input.
  - 1.4 Maintain a FESH Inspection Check List for evaluating all aspects of FESH concerns throughout the workplace. The requirements of OSHA and EPA shall be addressed in the FESH Inspection Check List. (See SOP 01.02)
  - 1.5 Seek input from each employee.
  - 1.6 Take minutes of each meeting. Post on the Bulletin Board and advise employees that a personal copy may be obtained if needed...
- 2.0 Appointment of Members.** The Environmental, Occupational Health and Safety Officer shall facilitate the appointments to include management and as many members from employee sections as are deemed necessary to represent a cross section of the safety concerns of all persons in the district.
- 3.0 Special Requirements.**
- 3.1 MSDSs. The Administrator of the Hazardous Communication Program shall oversee the obtaining, filing, and general maintenance of MSDSs. She (he) shall ensure that new MSDSs are brought tot the attention of employees as needed for safety and health...



3.2 Standard Operating Procedures. The committee shall oversee the preparation of all SOPs with special attention to keeping current the Hazard Communication Program and all programs that affect employee safety. Provisions for this shall be included in each monthly agenda.

AUTHOR: KHerrera

# PLAINFIELD PUBLIC SCHOOLS OFFICE OF FACILITIES AND GROUNDS

## EMERGENCY ACTION/FIRE PREVENTION PLAN

**SOP: 04.00**

Ref. 29 CFR 1910.156 & 29 CFR 1910.57 & 29 CFR 1910.136, 137, 138, 139

The Plainfield Public Schools does not have a Fire Brigade. Plainfield Public School staff members shall NOT fight fires. Designated persons, who have been trained and tested in fire extinguisher operation may use portable fire extinguishers to fight only small, incidental fires but ONLY if they can do it safely. At this time the Plainfield School District has not designated any staff members to operate fire extinguishers. Under 29 CFR 1910.139, all staff, students and visitors shall follow the procedures as written in the Plainfield Public School Emergency Evacuation Plan in the event of a fire or other such related emergency evacuation situation. Furthermore, 29 CFR 19610.1450, Laboratory Standard, specially the Plainfield Public School Chemical Hygiene Plan, Appendix C, SOP -6, prohibits any fire fighting measures by PPS staff member.

AUTHOR: KHerrera

# Floor Cleaning Standard Operating Procedures



Procedure No.  
CSOP – DM 101

## Damp Mopping - Single Compartment Bucket (String or Microfiber Tube Mop)

Step 1	Put on safety glasses and gloves.
Step 2	Fill the mop bucket with 4 gallons of diluted cleaning chemical. A dilution control mixing station will ensure the proper dilution of chemical. <b>Note: Follow the manufacturer's mixing directions if a dilution control station is not available.</b>
Step 3	Collect tools and equipment and proceed to the area.
Step 4	Always post caution signs before wet mopping.
Step 5	<b>Dry Dust Mop Area</b> <ol style="list-style-type: none"><li>1. Dry dust mop to gather loose soil and debris.</li><li>2. Scrape up gum or heavy debris.</li><li>3. Pick up debris with dustpan and counter brush.</li></ol>
Step 6	<b>Preparing the Mop</b> Dip the mop in the cleaning solution; wring it out until the mop is damp.
Step 7	<b>Mopping the Floor</b> Start at the farthest area of the floor and work backward using a "figure 8" stroke. <ol style="list-style-type: none"><li>1. In hallways, mop lengthwise along baseboard to form a "U" around the area being mopped.</li><li>2. Mop your way out of the "U" by filling it in using a "figure 8" stroke. Use a figure eight stroke on the balance of the area. This is referred to as "framing the floor."</li><li>3. Flip the mop every 6 feet.</li><li>4. Dip mop back into cleaning solution and wring out.</li></ol> <b>Note: Do not swing the mop more than 4' to the right and left.</b>
Step 8	Once the mop bucket solution becomes visibly soiled, change the solution.
Step 9	Repeat steps 4-8 until the entire floor area to be mopped has been cleaned.
Step 10	Clean and return all equipment to the storage area.
Step 11	<ol style="list-style-type: none"><li>1. Rinse the bucket and wringer and allow to air dry.</li><li>2. The mop should be rinsed thoroughly in clean water and hung to dry.</li><li>3. Mops may also be laundered and machine dried. Follow the mop manufacturer's recommendation.</li></ol>
Step 12	Remove PPE and wash your hands with soap and water.

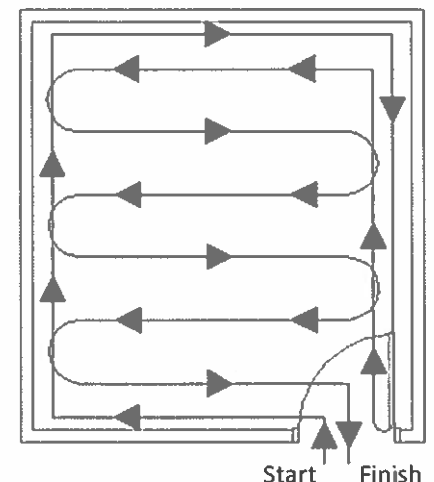
### Safety Tools

- Gloves
- Safety glasses
- Wet floor signs

### Product Checklist

- Mop bucket and wringer
- One wet mop handle
- One wet mop head
- One dust mop with handle
- Neutral cleaner or disinfectant
- 1.5" scraper
- SDS sheets
- Dustpan
- Counter brush

### Framing the Floor Illustration



Procedure No.  
CSOP – DM 102

## Damp Mopping - Divided Compartment Bucket (String, Microfiber Tube Mop or Flat Mop)

Step 1	Put on safety glasses and gloves.
Step 2	<ol style="list-style-type: none"> <li>1. Fill the rear compartments of the mop bucket with 2 gallons of clean rinse water.</li> <li>2. Fill the front compartment with clean diluted chemical.</li> <li>3. Place the wringer on the rear compartment.</li> </ol>
Step 3	Collect tools and equipment and proceed to the area.
Step 4	Always post caution signs before wet mopping.
Step 5	<b>Dry Dust Mop Area</b> <ol style="list-style-type: none"> <li>1. Dry dust mop to gather loose soil and debris.</li> <li>2. Scrape up gum or heavy debris.</li> <li>3. Pick up debris with dustpan and counter brush.</li> </ol>
Step 6	<b>Preparing the Mop</b> <ol style="list-style-type: none"> <li>1. Place mop in the front compartment with the clean chemical.</li> <li>2. Pull the mop from the solution and place it in the wringer. Wring out until mop is damp.</li> <li>3. Place the mop on the floor.</li> </ol>
Step 7	<b>Mopping the Floor</b> Start at the farthest area of the floor and work backward using a "figure 8" stroke. <ol style="list-style-type: none"> <li>1. In hallways, mop lengthwise along baseboard to form a "U" around the area being mopped.</li> <li>2. Mop your way out of the "U" by filling it in using a "figure 8" stroke. Use a figure eight stroke on the balance of the area. This is referred to as "framing the floor."</li> <li>3. Flip the mop every 6 feet.</li> <li>4. Dip mop back into cleaning solution and wring out.</li> </ol> <b>Note: Do not swing the mop more than 4' to the right and left.</b>
Step 8	After mopping the floor, the mop will begin to dry. <ol style="list-style-type: none"> <li>1. Return to the bucket and rinse the soiled mop in the rear compartment. Dip 3 times.</li> <li>2. Wring out soiled mop.</li> <li>3. Place the mop in front compartment with clean solution. Dip 3 times.</li> <li>4. Place mop in rear compartment wringer only. Wring out mop until it's damp.</li> <li>5. Continue mopping the floor.</li> <li>6. When front compartment is out of clean solution, then return to the closet to empty and refill the bucket.</li> </ol>
Step 9	Repeat steps 6-8 until the entire floor area to be mopped has been cleaned.
Step 10	Clean and return all equipment to the storage area.
Step 11	<ol style="list-style-type: none"> <li>1. Rinse the bucket and wringer and allow to air dry.</li> <li>2. The mop should be rinsed thoroughly in clean water and hung to dry.</li> <li>3. Mops may also be laundered and machine dried. Follow the mop manufacturer's recommendation.</li> </ol>
Step 12	Remove PPE and wash your hands with soap and water.

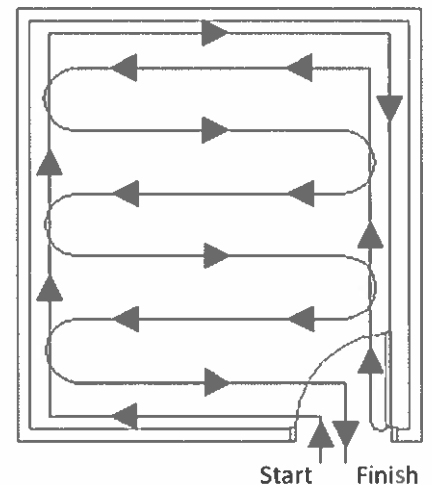
### Safety Tools

- Gloves
- Safety glasses
- Wet floor signs

### Product Checklist

- Mop bucket and wringer
- One wet mop handle
- One wet mop head
- One dust mop with handle
- Neutral cleaner or disinfectant
- 1.5" scraper
- SDS sheet
- Dustpan
- Counter brush

### Framing the Floor Illustration



Procedure No.  
CSOP F101

## Apply Restorer and Burnish Procedure

<b>Step 1</b>	Collect tools and equipment and proceed to the area.
<b>Step 2</b>	Dust mop or sweep floor area and remove any foreign debris, i.e., gum, tar, etc.
<b>Step 3</b>	Post wet floor signs.
<b>Step 4</b>	Move portable items to one side of the area or hallway
<b>Step 5</b>	Dust mop the area using a clean dust mop
<b>Step 6</b>	Wet mop or clean the area with an automatic scrubber and neutral cleaner.
<b>Step 7</b>	Inspect the UHS floor machine for damage. Be sure the cord is in good condition. Inspect the jacket and three prong plug. Report any damage to your supervisor.
<b>Step 8</b>	<p>Prepare the UHS floor machine. <b>Be sure the floor machine is not plugged into power when mounting the pad.</b> Tip it back and attach a UHS pad to the drive block. Some UHS machines have a center mount locking device to secure pad in place. Be sure this is locked in place.</p> <p><b>DO NOT USE A PAD SMALLER OR LARGER THAN THE DIAMETER OF THE DRIVE BLOCK.</b></p>
<b>Step 9</b>	Plug cord into power outlet.
<b>Step 10</b>	Burnish floor area. Overlap 2-3 inches on each pass. Avoid electrical floor plates and raised areas.
<b>Step 11</b>	Inspect your work and redo unacceptable areas.
<b>Step 12</b>	Clean power cord with a cloth and all-purpose cleaner. Remove pad. Wrap the cord and return to supply area. Clean burnishing pad and hang it up to air dry.
<b>Step 13</b>	Dry dust mop the floor area. Vacuum or sweep dust from edges and corners.

### Safety Tools

- Gloves
- Safety glasses or goggles
- Wet floor signs

### Product Checklist

- Ultra high speed floor machine
- UHS propane machine
- Battery-powered UHS
- Cleaning cloths
- Floor machine with pad driver
- Automatic scrubber
- Ultra high speed burnishing pads
- Dust mop w/handle
- Personal protective equipment (rubber gloves, eye protection)
- Measuring cup



<b>Step 1</b>	Collect tools and equipment and proceed to the area.
<b>Step 2</b>	Place wet floor signs.
<b>Step 3</b>	Place a new trash liner in your mop bucket and allow excess to drape over the side of the bucket.
<b>Step 4</b>	Pour appropriate floor finish into lined mop bucket.
<b>Step 5</b>	<p>Place your finish mop into bucket and <b>GENTLY</b> wring out excess material. The most effective way to remove excess material is to place the mop into the wringer and push the mop down into the wringer. This will remove all excess finish while avoiding any foam build-up in the bucket.</p> <p><b>DO NOT PLACE MOP IN WRINGER AND WRING OUT.</b> This causes foam in the bucket, which may lead to bubbles in the floor finish</p>
<b>Step 6</b>	Outline the perimeter of the area to be finished. It is not necessary to go to the baseboard. We recommend no more than two (2) coats of finish against the baseboard.
<b>Step 7</b>	Begin applying the finish in a "figure eight motion". The figure eight motion allows for a 20 - 25 percent overlap, therefore leaving no missed spots.
<b>Step 8</b>	Allow floor finish to dry; approximate dry times vary between 15 - 25 minutes.
<b>Step 9</b>	Caution: DO NOT apply more than 4 coats in a 24-hour period

### Safety Tools

- Gloves
- Safety glasses or goggles
- Floor finish shoe booties
- Wet floor signs

### Product Checklist

- Mop bucket and wringer
- Clean blue and white candy stripe floor finish mop or flat mop designed for finish application
- High speed floor finish applicator (optional)
- Mop handle
- Plastic trash liner
- Watering can for gardening (optional tool to apply finish)
- White cloths or rags
- Disposable cloth shoe covers
- Egg timer



Procedure No. CSOP F103	Floor Stripping Procedure
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<b>Step 1</b>	Dust mop or sweep floor area and remove any foreign debris, i.e., gum, tar, etc. Vacuum corners and edges if necessary.
<b>Step 2</b>	Mix proper solution of stripper with the correct amount of water in your mop bucket
<b>Step 3</b>	Post wet floor signs.
<b>Step 4</b>	Mop the diluted stripper over the area to be cleaned (approximately 12' x 12') and allow adequate time for penetration of the stripper. Under normal conditions the diluted stripper should remain on the floor surface for 7 - 10 minutes. <b>Do not allow stripper solution to dry.</b>
<b>Step 5</b>	After a period of proper chemical reaction has passed (approximately 10 minutes), agitate the floor surface with a swing floor machine or automatic scrubber.
<b>Step 6</b>	Use a utility pad holder with handle, equipped with a black pad, and agitate the perimeter of the room, i.e., baseboards.
<b>Step 7</b>	Recover all stripper solution with a wet vacuum equipped with the proper floor squeegee tool.
<b>Step 8</b>	If heavy build-up is present, reapply diluted stripper and allow 10 minutes dwell time and re-agitate with floor machine.
<b>Step 9</b>	Recover all stripper solution with a wet vacuum or automatic scrubber.
<b>Step 10</b>	After floor has dried, check to insure that <b>ALL</b> the stripper residue has been removed by running your hand across the floor surface. If there is residue present on your hand, repeat step #8.
<b>Step 11</b>	Damp mop floor with a <b>CLEAN</b> mop and <b>CLEAN</b> rinse water.
<b>Step 12</b>	Clean your equipment and return it to its appropriate area.
<b>Step 13</b>	Do not remove the wet floor signs until floor is completely dry.

<b>Safety Tools</b>
<input type="checkbox"/> Gloves <input type="checkbox"/> Safety glasses or goggles <input type="checkbox"/> Stripper boots <input type="checkbox"/> Wet floor signs

<b>Product Checklist</b>
<input type="checkbox"/> Two mop buckets w/wringers <input type="checkbox"/> Two mop handles w/24 oz. rayon wet mop heads <input type="checkbox"/> Utility pad holder w/black pad <input type="checkbox"/> Long handle scraper w/3" blade <input type="checkbox"/> Putty knife <input type="checkbox"/> Cleaning cloths <input type="checkbox"/> Floor machine with pad driver <input type="checkbox"/> Automatic scrubber <input type="checkbox"/> Black stripping pads <input type="checkbox"/> Wet vacuum w/hose and squeegee tool or wet dry vacuum with front mounted squeegee <input type="checkbox"/> Finish stripper <input type="checkbox"/> Floor finish <input type="checkbox"/> Sealer if needed <input type="checkbox"/> Small utility pail or watering can (for applying finish) <input type="checkbox"/> Floor finish mop with mop handle or floor finish applicator <input type="checkbox"/> Dust mop w/Handle <input type="checkbox"/> Egg timer <input type="checkbox"/> Measuring cup





Procedure No.  
SOP F104

## Top Scrub & Recoat Procedure

<b>Step 1</b>	Dust mop or sweep floor area and remove any foreign debris, i.e., gum, tar, etc. Vacuum corners and edges if necessary.
<b>Step 2</b>	Mix proper solution of neutral or all-purpose cleaner in cool water in your mop bucket.
<b>Step 3</b>	Post wet floor signs.
<b>Step 4</b>	Mop the diluted cleaner (approximately 12' x 12') and allow 3-5 minutes dwell time. Add more cleaning solution if needed. <b>Do not allow cleaning solution to dry.</b>
<b>Step 5</b>	Agitate the floor surface with a swing floor machine or automatic scrubber. Use a medium abrasive pad or grit brush designed for top scrubbing
<b>Step 6</b>	Use a utility pad holder with handle, equipped with a blue or green pad, and agitate the perimeter of the room, i.e., baseboards.
<b>Step 7</b>	Recover all solution with a wet vacuum equipped with the proper floor squeegee tool or an automatic scrubber.
<b>Step 8</b>	Rinse thoroughly using a clean mop and clean water.
<b>Step 9</b>	Apply floor finish using a clean finish mop. Apply 2 coats of finish.
<b>Step 10</b>	Remove floor signs.
<b>Step 11</b>	Clean your equipment and return it to its appropriate area.

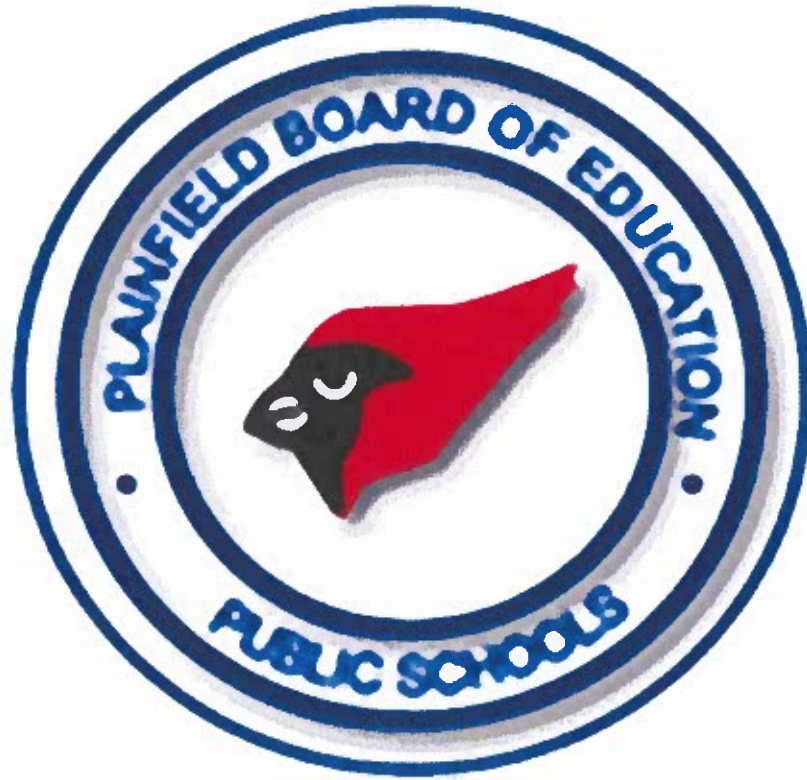
### Safety Tools

- Gloves
- Safety glasses or goggles
- Stripper boots
- Wet floor signs

### Product Checklist

- Two mop buckets w/wringers
- Two mop handles w/24-oz rayon wet mop heads
- Utility pad holder w/blue pad
- Putty knife
- Cleaning cloths
- Personal protective equipment (rubber gloves, eye protection)
- Floor machine with pad driver
- Automatic scrubber
- Blue/green scrubbing pads
- Wet vacuum w/hose and squeegee tool or wet dry vacuum with front-mounted squeegee
- Neutral or all-purpose cleaner
- Floor finish
- Small utility pail or watering can (for applying finish)
- Floor finish mop with mop handle or floor finish applicator
- Dust mop w/handle
- Measuring cup





# FACILITY READINESS PROGRAM

# Office & Classroom Standard Operating Procedures



<b>Step 1</b>	Remove large pieces of litter from floor
<b>Step 2</b>	Empty trash and replace liners
<b>Step 3</b>	Empty pencil sharpeners. And disinfect outside of sharpener and handle
<b>Step 4</b>	Damp clean the white board using a cloth dampened in an approved cleaner or water. Be sure to damp wipe the marker tray
<b>Step 5</b>	Vacuum traffic patterns on carpets floors; remove gum and soil spots.
<b>Step 6</b>	Dust flat and vertical classroom surfaces.
<b>Step 7</b>	Dust mop all hard floor surfaces, sweeping material toward the classroom door.
<b>Step 8</b>	Wipe desktops with disinfectant and cleaning cloth
<b>Step 9</b>	Wet mop tiled floors.
<b>Step 10</b>	Clean glass in doors and partitions.
<b>Step 11</b>	Arrange classroom furniture.
<b>Step 12</b>	Wipe door handle and hand plate
<b>Step 13</b>	Check for burned out tubes or bulbs and replace them with bulbs of the same wattage. Inspect, report any repairs required
<b>Step 14</b>	Secure the classroom (lights off, close and lock windows and classroom entry doors).

### Safety Tools

- Gloves
- Safety glasses or goggles

### Product Checklist

- Upright or backpack vacuum
- Dust mop
- Trash barrel on wheels
- Dust pan and counter brush
- Bottle of premixed approved cleaning agent (chemical or germicidal depending on area)
- Glass Cleaner
- All purpose cleaner
- Stainless steel cleaner
- Carpet spotter
- Cleaning cloths
- Feather or synthetic duster
- Wet mop
- Bucket (single or divided)
- Scraper / putty knife
- Liners



# Office Cleaning Procedure

<b>Step 1</b>	Put on Personal Protective Equipment
<b>Step 2</b>	Assemble cart or trash barrel with all tools and products
<b>Step 3</b>	<p>Trash</p> <ol style="list-style-type: none"> <li>Dump trash as you move counter-clockwise and circle around the room, zig-zagging back and forth as necessary between cubicles, offices and hallways.</li> <li>Pick up obvious trash around trash can and under desk. If boxes are on the floor or on top of the trash can, leave them unless they are specifically marked as "Trash".</li> <li>Separate recycling from regular trash.</li> <li>Replace liners if torn, wet, or if food is in trash can.</li> <li>Keep extra can liners in bottom of trash can and tie off liners to fit can when replacing liner. Place an extra liner at the bottom of the trash can</li> <li>Put trash can back into proper place.</li> <li>DO NOT compact trash with your hands. Use a small trash can to compact trash.</li> <li>When cart bag / trash barrel is full, tie off and remove bag. Place bag on tarp at drop area. To remove bag, tip trash barrel on its side and pull bag out.</li> </ol>
<b>Step 4</b>	<p>Dusting</p> <ol style="list-style-type: none"> <li>Dust high to low, back to front. Move counter-clockwise and circle around the room, zig-zagging back and forth as necessary between cubicles and hallways.</li> <li>Dust all surfaces. Look for build-up on object as you move through the office.</li> <li>Move dust and replace items when needed on desks-tops.</li> <li>Dust picture frames, plaques with one hand and dust with the other.</li> <li>Don't forget hard partition tops, door jambs, mini blinds, table legs, chair legs, vents and window sills.</li> </ol>
<b>Step 5</b>	Wipe spots on walls, desks, light switches with a damp cloth as you move through the office
<b>Step 6</b>	Clean glass in doors and partitions.
<b>Step 7</b>	Wipe door handle and hand plate
<b>Step 8</b>	Wipe down telephones (frequency based on scope of work).
<b>Step 9</b>	<p>Vacuum the carpet.</p> <ol style="list-style-type: none"> <li>Move counter-clockwise around the office.</li> <li>Vacuum under trash cans, desks, tables and around chairs. Vacuum entrance mats.</li> <li>Check for debris behind doors and edges of the wall.</li> </ol>
<b>Step 10</b>	Inspect area to make sure all cleaning tasks have been performed. Be sure all items have been returned to original location. Turn out lights and lock-up.
<b>Step 11</b>	Return supplies to closet. Remove gloves and glasses. Thoroughly and wash your hands.

## Safety Tools

- Gloves
- Safety glasses or goggles

## Product Checklist

- Vacuum
- Trash barrel on wheels
- Liners
- Glass Cleaner
- All purpose cleaner
- Disinfectant
- Stainless steel cleaner
- Cleaning cloths
- Feather or synthetic duster
- Note paper / pen



# POLICY

PLAINFIELD

BOARD OF EDUCATION

PROPERTY

7437/ Page 1 of 3

Safety Standards - Electrical Appliances

## 7437 Safety Standards - Electrical Appliances

The Board of Education recognizes that it is required by law to take measures for the safety measures shall provide procedures and precautions for the safety of pupils in school, employees in the performance of their duties, and visitors to the district.

### Definition

1. Extension Cords means a length of electrical cord with a plug at one end and a socket at the other, used to connect an appliance when the electrical supply is some distance away and is for temporary use.
2. Personal Appliances are:
  - i. Space Heaters
  - ii. Cooling Fans
  - iii. Coffee Machines
  - iv. Coffee Pots
  - v. Toaster Ovens
  - vi. Microwaves
  - vii. Hot Plates
  - viii. Personal Refrigerators
  - ix. Personal Air Purifiers
  - x. Radios
  - xi. Plug-Ins (Deodorizers)
3. New Jersey Administrative Code (N.J.A.C)
4. Designated Staff Members
  - i. Staff members who are given the authority by the Director of Facilities either written or verbal to use temporary wiring or extension cords.

The Plainfield Public Schools shall implement the following policy in compliance with the International Fire Code, NJ edition, sections, 605.1 through 605.11.



# POLICY

PLAINFIELD

BOARD OF EDUCATION

PROPERTY

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## Safety Standards - Electrical Appliances

Staff must abide by the following safety procedures:

1. The use of power extension cords and multi-plug adapters and non-fused plug strips is **prohibited**.
2. Per 605.4.1; power taps (power strips) shall be polarized, grounded and equipped with over-current protection (fuse or circuit breaker) and shall be listed in accordance with UL 1363.
3. Only the Plainfield Public School District designated staff members shall use temporary wiring (approved) or extension cords, for electrical power and lighting installation during periods of construction remodeling, repair or demolition of buildings, structures, equipment or similar activities.
4. The allowable time for the use of temporary wiring (approved) or extension cords is permissible for a period not to exceed 90 days.
5. The Plainfield Public Schools prohibits the use of all portable personal appliances including space heaters and cooling fans. Furthermore, under the International Fire Code, sections 605, 605.1 coffee machines, coffee pots, toaster ovens, microwaves, hot plates, and personal refrigerators shall not be used except in a designated area(s) complying with N.J.A.C 30.13 and the 2002 NJ School Integrated Pest Management Act.

### PROCEDURE

Administrators of each building/facility in consultation with the Director of Facilities, the Integrated Pest Management Coordinator and the Environmental, Occupational Health and Safety Officer shall determine both the number and type of



# POLICY

PLAINFIELD

BOARD OF EDUCATION

PROPERTY

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Safety Standards - Electrical Appliances

Appliances that will be approved for use, and designate the areas where they shall be used. Such approval shall be in writing and signs will be posted in the designated areas.

## ENFORCEMENT

1. All employees shall immediately comply with this policy.
2. Any employee that observes a violation of this policy has an obligation to report the violation to the chief administrator of the building and the Director of Facilities.
3. The Director of Facilities shall have the authority to direct any employee to remove the violation immediately.





# Restroom Cleaning Standard Operating Procedures



## Daily Restroom Cleaning Procedure

<b>Step 1</b>	Put on Personal Protective Equipment.
<b>Step 2</b>	Assemble restroom cart with all tools, products and re- stroom supplies (paper, hand soap deodorizer and sanitary napkins).
<b>Step 3</b>	Mix cleaning chemicals in buckets and bottles
<b>Step 4</b>	Travel to restroom. Knock, announce yourself, and prop open door.
<b>Step 5</b>	Place safety signs "Restroom Closed" or "Wet Floor"
<b>Step 6</b>	Empty all waste receptacles and replace liners. Spot clean receptacles. Empty sanitary receptacle and replace liners.
<b>Step 7</b>	Dust all vents, ledges and partitions (clean top to bottom, dry before wet).
<b>Step 8</b>	Restock all paper products, towels, tissue, feminine sup- plies, soap dispensers, deodorant air systems, toilet seat covers and replace all dispenser liners.
<b>Step 9</b>	Flush all toilets and urinals to remove debris. Add 2-3 oz of bowl cleaner.
<b>Step 10</b>	Spray inside and outside of toilets and urinals with disinfect- ant cleaner, do not flush
<b>Step 11</b>	Spot clean doors, partitions and walls
<b>Step 12</b>	Clean sinks, fixtures, countertops and mirrors. Polish chrome or other metal work .
<b>Step 13</b>	Scrub inside of toilets and urinals. Flush
<b>Step 14</b>	Wipe outside of toilets and urinals
<b>Step 15</b>	Sweep floor
<b>Step 16</b>	Wet mop floor
<b>Step 17</b>	Inspect, report any repairs required

### Safety Tools

- Gloves
- Safety glasses or goggles
- Wet floor signs

### Product Checklist

- Bottle of premixed approved cleaning agent (chemical or germicidal depending on area)
- Glass Cleaner
- All purpose cleaner
- Acid bowl cleaner
- Cleaning cloths
- Bowl mop or brush
- Hand brush
- Restroom cart
- Feather or synthetic duster
- Wet mop
- Bucket (single or divided)
- Do not enter door sign
- Scraper
- Deodorizer refills
- Sanitary napkin
- Paper towels
- Hand towels
- Urinal blocks
- Hand Soap



Procedure No.  
CSOP R102

## Daily Restroom Cleaning Procedure – Restroom Cleaning Machine

Step 1	Put on personal protective equipment (PPE)
Step 2	Assemble restroom cart with all tools, products and restroom supplies (paper, hand soap deodorizer and sanitary napkins).
Step 3	Fill restroom machine with clean, cool water
Step 4	Select metering tip and insert into cap barb
Step 5	Travel to restroom. Knock, announce yourself, and prop open door.
Step 6	Place safety signs "Restroom Closed" or "Wet Floor"
Step 7	Place restroom machine in door way of restroom,
Step 8	Plug restroom machine into outlet, not located in restroom
Step 9	Empty all waste receptacles and replace liners. Spot clean receptacles. Empty sanitary receptacle and replace liners
Step 10	Unwind vacuum hose
Step 11	Turn on vacuum switch
Step 12	Air blow, attach wand and attachments then dust all vents, ledges and partitions (clean top to bottom).
Step 13	Turn off vacuum switch
Step 14	Rehang vacuum hose, put up attachments
Step 15	Flush all toilets and urinals to remove debris.
Step 16	Unwind chemical hose, and attach attachments
Step 17	Turn on chemical dispensing switch.
Step 18	Spray nozzle in hand, push front part backwards, and either left or right for fan spray.
Step 19	Clean restroom starting from the furthest point away from the door working-working back out of the door spray doors, partitions sinks, fixtures, countertops, showers and walls.
Step 20	Pinpoint Spray inside and outside of toilets and urinals with disinfectant cleaner, do not flush
Step 21	Manually brush heavily solid areas
Step 22	Spray nozzle in hand, pulled front part backwards, and either left or right for fan spray.
Step 23	Rinse restroom starting from the furthest point away from the door working-working back out of the door
Step 25	Turn off chemical dispensing switch
Step 26	Rehang chemical hose clockwise
Step 27	Turn on vacuum switch
Step 28	Unwind vacuum hose, and attach floor wand
Step 29	Vacuum restroom entire floor starting furthest point away from door working-working back out of the door
Step 30	Turn off vacuum switch
Step 31	Rehang vacuum hose, put up attachments
Step 32	Clean and squeegee mirrors and flush all toilets
Step 33	Restock all paper products, towels, tissue, feminine supplies, soap dispensers, deodorant air systems, toilet seat covers and replace all dispenser liners.
Step 34	Inspect, report any repairs required
Step 35	Dump dirty water in closet sink.
Step 36	Clean and prepare machine for next usage.

### Safety Tools

- Gloves
- Safety glasses, goggles or face shield
- Wet floor signs

### Product Checklist

- Approved Disinfectant
- Cleaning cloths
- Bowl mop or brush
- Hand brush
- Restroom cart
- Do not enter door sign
- Scraper
- Deodorizer refills
- Sanitary napkin
- Paper towels
- Hand towels
- Urinal blocks
- Hand Soap
- Sanitary disposable bags
- Liners



Procedure No.  
SOP HD-101

## Hand Dryer Cleaning

<b>Step 1</b>	Put on Personal Protective Equipment (PPE).
<b>Step 2</b>	Assemble restroom cart with all cleaning tools, products and restroom supplies.
<b>Step 3</b>	Mix cleaning chemicals in buckets and bottles. Prepare the cleaning solutions in a clean mop bucket following manufacturer's dilution directions.
<b>Step 4</b>	Travel to restroom. Knock, announce yourself, and prop open door.
<b>Step 5</b>	Place safety signs "Restroom Closed" or "Wet Floor"
<b>Step 6</b>	Observe hand dryer for debris. Remove any heavy debris from the hand dryer with a plastic putty knife. <b>Be careful not to scratch the dryer surfaces.</b> Place the debris in a trash can.
<b>Step 7</b>	Sweep the floor using a toy broom and dustpan to remove and dry debris.
<b>Step 8</b>	Once dry debris has been completely removed from the dryer and the floor, apply disinfectant to all surfaces. Allow disinfectant to sit wet for manufacturer's recommended dwell time.
<b>Step 9</b>	Wipe all surfaces with a cleaning cloth. Clean all horizontal and vertical surfaces of the hand dryer. Clean the air inlet areas.
<b>Step 10</b>	Wet mop the floor beneath and around the machine. Allow the floor to dry before removing the floor signs.
<b>Step 11</b>	Complete final inspection of the area. Remove signage.
<b>Step 12</b>	Move to the next hand dryer and repeat steps 1-11.

### Safety Tools

- Gloves
- Safety glasses
- Wet floor signs

### Product Checklist

- Dilution control center
- EPA registered disinfectant
- White cotton cleaning cloths or microfiber cloth
- Trigger sprayer with secondary label
- Bucket with wringer
- Wet mop
- Microfiber Velcro flat mop with charging wet bucket (optional system)
- SDS sheet for cleaning chemicals
- Toy broom and dustpan with 3' handle
- Plastic putty knife



**STANDARD OPERATING PROCEDURE**  
**FLOOR JACK SAFETY**  
**CURRICULUM AND INSTRUCTION, FACILITIES**

**I. INTRODUCTION**

The Plainfield School District shall adopt 29 CFR 1910.241 as it pertains to the floor jacks used in operations daily. Furthermore, compliance under the Authority: Sections 4, 6, and 8 of the Occupational Safety and Health Act of 1970 (29 U.S.C. 653, 655, 657); Secretary of Labor's Order No. 12-71 (36 FR 8754), 8-76 (41 FR 25059), 9-83 (48 FR 35736), 1-90 (55 FR 9033), or 5-2007 (72 FR 31159), as applicable; 29 CFR part 1911, shall be adopted.

**II. DEFINITIONS, 1910.241 (D) (1-2)**

A. Jack: A jack is an appliance for lifting and lowering or moving horizontally a load by application of a pushing force.

Jacks may be of the following types:

1. Lever
2. Ratchet
3. Screw
4. Hydraulic
- 5.

B. Rating. The rating of a jack is the maximum working load for which it is designed to lift safely that load throughout its specified amount of travel.

NOTE: To raise the rated load of a jack, the point of application of the load, the applied force, and the length of lever arm should be those designated by the manufacturer for the particular jack considered.

Author: KHerrera

## PLAINFIELD PUBLIC SCHOOLS OFFICE OF FACILITIES AND GROUNDS

### III. INTERPRETATION

This SOP for Floor Jack Safety shall include the hydraulic jack, mechanical ratchet jack and the mechanical screw jack. Procedures for labeling, peruse check, lifting load and inspection and maintenance of the equipment shall be followed.

### IV. PROCEDURE 1910.241(d)(2), 244(a)(1-2)

A. Labeling - all jacks shall be labeled with the rate load. If this information is compromised a replacement label shall be placed on the equipment immediately. The rating load shall be legibly and permanently marked in a prominent location on the jack by casting stamping, or other suitable means.

#### B. Before Use -

1. The operator shall make sure that the jack used has a rating sufficient to lift and sustain the load.
2. Visually inspect jacks and keep them in good working order.
3. Make sure the jack is safe to lift the load.

#### You must

- a. Visually examine the general condition of the jack before each use.

If a jack is to be used more than once on a class period, the visual examination is only required before the jack is used for the first time on that day.

- b. Make sure the weight to be lifted or supported is within the rated load of the jack.
- c. Make sure the base of the jack is on a firm foundation or blocked before lifting the load.
- d. Make sure hydraulic jacks exposed to freezing temperatures function properly at the temperature they will be used.

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### C. OPERATION AND LIFTING -

1. In the absence of a firm foundation, the base of the jack shall be blocked. If there is a possibility of slippage of the cap, a block shall be placed in between the cap and the load.
2. The operator shall watch the stop indicator, which shall be kept clean, in order to determine the limit of travel. The indicated limit shall not be overrun.
3. After the load has been raised, it shall be cribbed, blocked, or otherwise secured at once.
4. Hydraulic jacks exposed to freezing temperatures shall be supplied with an adequate antifreeze liquid.
5. Lift the load safely
  - a. Place a block between the load cap and the load if the load could slip off the jack.
  - b. Secure the load from falling or slipping immediately after it's raised by one or mor of the following:
    - Cribbing
    - Blocking
    - Some other equally effective method.
  - c. Make sure you don't exceed the limit of travel of the jack.
  - d. The limit of travel can be determined by one or more of the following:
    - A positive stop
    - A stop indicator
    - Some other equally effective method.

### D. MAINTENANCE AND INSPECTION -

1. All jacks shall be properly lubricated at regular intervals.
2. Each jack shall be thoroughly inspected at times which depend upon the service conditions. Inspections shall not be less frequent than the following:
3. For constant or intermittent use at one locality, once every 6 months,

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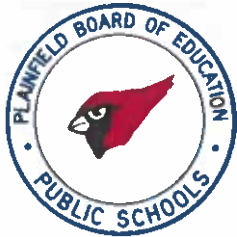
### 4. Inspect jacks at appropriate intervals:

Make sure frequent inspections are done by the operator or other designated person as follows:

- a. Before a jack is first placed in service.
  - b. Monthly for a jack used in normal service.
  - c. Daily or before each use for a jack used for other than normal service.
  - d. Before using a jack that has been altered, modified, or repaired.
  - e. Before using a jack that hasn't been used in one year or more.
  - f. Make sure a periodic inspection of the jack is done once a year.
  - g. Inspect the jack using, Jack Inspection Requirements, during any frequent or periodic inspection.
5. For jacks sent out of shop for special work, when sent out and when returned.
  6. For a jack subjected to abnormal load or shock, immediately before and immediately thereafter.
  7. Repair or replacement parts shall be examined for possible defects.
  8. Make sure a jack that is out of order is:
    - Tagged
    - Not used until repaired.
  9. Make sure a jack is properly lubricated at regular intervals. The jack should be lubricated following the manufacturer's instructions.
  10. An inspection log shall be maintained for each jack, using form JACK INSPECTION.



PLAINFIELD PUBLIC SCHOOLS  
DEPARTMENT OF  
FACILITIES & GROUNDS



PPS

SOP - 404

**Standard Operating Procedure Manual**

Subject: **Reporting of Bed Bugs/Infestation**

**1.0 PURPOSE AND SCOPE:**

The purpose of this procedure is to maintain a safe and healthy environment in all school buildings. In order to achieve this objective certain reporting procedures must be followed when bed bugs and other infestation is observed.

**2.0 PROCEDURE:**

The following procedures are to be followed:

- a. Anyone who sees or suspects bed bugs on school property shall promptly report the condition to the Building Principal.

**3.0 REPONSIBILITIES:**

1. The School IPM Coordinators are responsible for the following:
  - a. Collecting information about the infestation – room{s}/location, possible student/staff source.
  - b. Confiscating any infested material and placing them in a plastic bag (i.e. back packs, gym bags etc.)
  - c. Determine if any room{s}/areas should be quarantined.
  - d. Notify the School Nurse.
  - e. Notify the Facilities Director.
2. The School Nurse is responsible for the following:
  - a. Student/parent contact and discussion if required.

3. The Facilities Director is responsible for the following:
  - a. Contacting an exterminator.
  - b. Exterminator will advise the Facilities Director the amount of time an area or room must be vacant.
  - c. Facilities Director will contact the Building Principal to notify of date of extermination in order to make arrangements for relocation of class, if required.

#### **4.0 OTHER:**

1. Depending on the IPM treatment by the exterminator, certain areas may need to be closed. In addition, extermination may need to be done after hours.
2. Any upholstered furniture in classrooms suspected of infestation will be removed.

# Specialty Cleaning Standard Operating Procedures



Procedure No. CSOP S101	<b>Window Washing - Squeegee and Bucket Method (Exterior Glass)</b> <b>Standard Operating Procedure (SOP)</b>
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<b>Step 1</b>	Use a window cleaning T-Bar with sleeve and window washing bucket. Wet the section of glass to be cleaned with the glass cleaning solution. While the glass is wet, scrape off any residue using a new razor blade, and scrub hard-to-clean areas. Wash off the ledges and window frame. Do not use more solution than necessary.
<b>Step 2</b>	<p>Be sure that all dirt has been removed from the glass before using the squeegee, and start the squeegee process before any dry spots appear. To avoid "dry skip," wipe the blade with a damp towel before beginning.</p> <p>At the top corner of the glass, tilt the blade so that its top 2 inches of the rubber blade are touching the surface. Pull the squeegee across the glass to make a 2-inch dry strip, touching just the glass surface and not the frame.</p> <p>This creates an area from which you can start cleaning the rest of the surface and prevents "run down" from the top.</p>
<b>Step 3</b>	<p>Wipe the blade again with a towel. Beginning on the dry strip at the top, pull the squeegee downward to within 2 or 3 inches of the bottom of the glass. Repeat this step across the entire surface, overlapping strokes as you go.</p> <p>Be sure to clean the blade between each stroke and at the end of the last stroke.</p> <p>Do not use unnecessary pressure.</p>
<b>Step 4</b>	<p>Wipe along the bottom of the glass with a clean towel to remove excess water. Repeat step 2 to create a dry strip along the lower edge, remembering not to touch the frame. The glass should now look spotless with no streaks or drips.</p>
<b>Step 5</b>	<p>Large surfaces should be divided into sections for cleaning. Otherwise, the solution may dry faster than it can be removed.</p> <p>To avoid a visible dividing line between sections, overlap strokes slightly.</p>
<b>Step 6</b>	<p><b>Note:</b> For large glass areas, the squeegee method is faster than spraying and wiping, but it requires more skill .</p> <p>You may not want to use this method for interior cleaning because controlling water runoff from the squeegee can be difficult.</p>

<b>Safety Products and Tools</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Nitrile gloves</li> <li><input type="checkbox"/> Safety glasses, goggles or face shield</li> </ul>
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<b>Product List</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Squeegee</li> <li><input type="checkbox"/> Squeegee blades</li> <li><input type="checkbox"/> Extension pole</li> <li><input type="checkbox"/> Razor blade scraper</li> <li><input type="checkbox"/> Window cleaning T-Bar with sleeve</li> <li><input type="checkbox"/> Window cleaning bucket</li> <li><input type="checkbox"/> Window cleaning cloth or microfiber cloth</li> <li><input type="checkbox"/> SDS sheet for glass cleaning chemicals</li> </ul>
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Procedure No. CSOP S102	Window Washing – Spot Cleaning Method (Interior Glass) Standard Operating Procedure (SOP)
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<b>Step 1</b>	Put on safety glasses and gloves.
<b>Step 2</b>	Spray the window with glass cleaner. Make sure the setting on the trigger sprayer is set for fine spray, not a straight stream spray.
<b>Step 3</b>	Remove any stickers or residue with a clean razor blade scraper. Be sure the area to be cleaned has had solution applied before attempting any removal.
<b>Step 4</b>	Wipe the glass clean of dirt and solution with a towel or disposable wipe.  Do not allow too much dirt to build up on the cloth; rotate it frequently.
<b>Step 5</b>	If you are doing both sides of the glass surface, wipe one side horizontally and the other side vertically.  Any streaks that appear will help determine the side of the surface that needs reworking.
<b>Step 6</b>	Return all tools to the storage closet. Clean tools and place them in their proper place.
<b>Step 7</b>	Remove PPE and wash your hands thoroughly.

<b>Safety Products and Tools</b>
<input type="checkbox"/> Nitrile gloves <input type="checkbox"/> Safety glasses, goggles or face shield

<b>Product List</b>
<input type="checkbox"/> Trigger sprayer <input type="checkbox"/> Glass cleaner <input type="checkbox"/> Window cleaning cloth or microfiber cloth <input type="checkbox"/> Disposable wipes <input type="checkbox"/> Razor blade scraper <input type="checkbox"/> SDS sheet for glass cleaning chemicals



Procedure No.  
CSOP S103

## Wall Washing – Flat Mop Method Standard Operating Procedure (SOP)

<b>Step 1</b>	<p><b>Note: This method is for non-porous or semi-porous wall surfaces.</b></p> <p>Put on safety glasses and gloves.</p>
<b>Step 2</b>	Gather all equipment, chemicals and tools.
<b>Step 3</b>	Set up floor safety signs.
<b>Step 4</b>	Clear the room of furniture and lay out drop cloths.
<b>Step 5</b>	<p>Prepare the cleaning solutions in the clean mop bucket following manufacturer's dilution directions.</p> <p>One bucket should contain the diluted cleaning chemical; the other a clean water rinse. Move the bucket system to the area being cleaned. Attach the flat mop to the mop head.</p>
<b>Step 6</b>	Sweep the walls with a clean soft flag tip broom or dry flat mop to remove dry debris and cobwebs.
<b>Step 7</b>	<p>Once the wall is swept, dip the flat mop head attached to the handle into the cleaning solution. <b>Note: Apply the solution from the bottom up to avoid chemical streaking.</b></p> <p>Work in an eight-by-eight foot floor-to-ceiling area, applying the solution and scrubbing with the mop head.</p>
<b>Step 8</b>	<p>Wring out the mop head in a clean-rinse solution and wipe off the surface with the head.</p> <p>You may want to dry the wall with a dry flat mop head. If the cleaning application is done properly, dry wiping may not be necessary.</p>
<b>Step 9</b>	Repeat steps 5-7 until the walls are clean.
<b>Step 10</b>	Return all tools to the storage closet. Clean all mops and tools and place them in their proper place.
<b>Step 11</b>	Remove PPE and wash your hands thoroughly.

### Safety Products and Tools

- Nitrile gloves
- Safety glasses, goggles or face shield
- Wet floor signs

### Product List

- Double or divided bucket
- Side press wringer
- Telescopic flat mop handle and frame
- Clean flat mops
- White cotton cleaning cloths
- All-purpose cleaning chemical
- Drop cloths
- SDS sheet for chemicals



Procedure No.  
CSOP S104

## Graffiti Removal - Standard Operating Procedure (SOP)

<b>Step 1</b>	Put on safety glasses and gloves. Place wet floor signs in the area to be cleaned. Be sure the area is well ventilated.	<b>Safety Products and Tools</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Nitrile gloves</li><li><input type="checkbox"/> Safety glasses, goggles or face shield</li><li><input type="checkbox"/> Wet floor signs</li></ul> <b>Product List</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Graffiti removal chemicals</li><li><input type="checkbox"/> All-purpose cleaner</li><li><input type="checkbox"/> White, green or blue scrub pads</li><li><input type="checkbox"/> Trigger sprayer</li><li><input type="checkbox"/> Microfiber cleaning cloths</li><li><input type="checkbox"/> SDS sheet for chemicals</li></ul>
<b>Step 2</b>	Close area (as much as possible or have coworker stand by to help keep building occupants and patrons away from the work area).	
<b>Step 3</b>	Apply chemical to a small amount of the graffiti (may test inconspicuous area first to be sure the chemical does not remove the paint or finish). Let chemical dwell on surface for a couple of minutes.  <b>Note:</b> If the graffiti removal chemical does not remove the graffiti, then contact your foreman / supervisor.	
<b>Step 4</b>	Agitate/scrub surface with a white, green or blue hand pad that leaves no scratches. Good idea to test on inconspicuous area first. White is the least abrasive.	
<b>Step 5</b>	Rinse and wipe the area.	
<b>Step 6</b>	Reopen the area.	
<b>Step 7</b>	Return all tools to the storage closet. Clean tools and place them in their proper place.	
<b>Step 8</b>	Remove PPE and wash your hands thoroughly.	



Procedure No.  
CSOP S105

## Light Fixture Cleaning – Manual Spray Method Standard Operating Procedure (SOP)

<b>Step 1</b>	Put on safety glasses and gloves. Place wet floor signs in the area to be cleaned. Be sure the area is well ventilated.	<b>Safety Products and Tools</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Nitrile gloves</li><li><input type="checkbox"/> Safety glasses, goggles or face shield</li><li><input type="checkbox"/> Wet floor signs</li></ul>
<b>Step 2</b>	Remove or cover furniture as needed. Set up drop cloths and access equipment around cleaning area.	
<b>Step 3</b>	Prepare the cleaning solution in a bucket. Follow the manufacturer's instructions. Move solution to the area being cleaned.	
<b>Step 4</b>	You may need a ladder to reach the fixtures. Inspect ladders carefully prior to use. When using a ladder, wear non-slip shoes and climb the ladder using both hands. Avoid excessive stretching or leaning. <b>Note: Never stand on furniture to clean a surface. Use extension tools, ladders or a lift.</b>	<b>Product List</b> <ul style="list-style-type: none"><li><input type="checkbox"/> All-purpose cleaner</li><li><input type="checkbox"/> All-purpose degreaser</li><li><input type="checkbox"/> Trigger sprayer</li><li><input type="checkbox"/> Microfiber cloths</li><li><input type="checkbox"/> 2 utility buckets</li><li><input type="checkbox"/> Telescopic pole with dusting attachment</li><li><input type="checkbox"/> Furniture drop cloths</li><li><input type="checkbox"/> Ladder</li><li><input type="checkbox"/> Dusting tool</li><li><input type="checkbox"/> SDS sheet for chemicals</li></ul>
<b>Step 5</b>	<b>Hanging or Traditional Light Fixture:</b> Dry dust the cobwebs and dirt from the fixture using a dry dusting tool. With pre-moistened microfiber cloth, wash the parts of the fixture, then wipe dry. <b>Note: Never clean fixtures with liquid solution when the power is on. This should be done with lights turned off.</b>	
<b>Step 6</b>	<b>Florescent Fixture:</b> Remove the diffuser lens cover from the florescent fixture. With pre-moistened microfiber cloth, wash the lens, then wipe dry. Reinstall the lens. Check lights to make sure they work. <b>Note: Never clean fixtures with liquid solution when the power is on. This should be done with lights turned off.</b>	
<b>Step 7</b>	When you are finished cleaning the lights, remove furniture drop cloths, ladder, and cleaning tools. Reposition furniture.	
<b>Step 8</b>	Return all tools to the storage closet. Clean tools and place them in their proper place.	
<b>Step 9</b>	Remove PPE and wash your hands thoroughly.	





Procedure No. CSOP S106	Cleaning Stainless Steel Drinking Faucets - Standard Operating Procedure (SOP)
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<b>Step 1</b>	Put on safety glasses and gloves.
<b>Step 2</b>	Gather all equipment, chemicals and tools.
<b>Step 3</b>	<p>Inspect the sink for hard water deposits. You can remove them with a mild acid cleaner and a white or green abrasive pad.</p> <p>Apply the acid to the fixture and sink. Scrub lightly with the white or green pad.</p> <p>Soak a microfiber cloth with cold water and flood rinse the fixture and sink several times to remove all acid residue.</p> <p>Spray the sink with an all-purpose cleaner to neutralize the acid residue and clean it with microfiber cloth and let it dry.</p> <p>Note: use a mild citric acid, phosphoric acid or acid shower cleaner to remove the hard water deposits.</p> <p><b>DO NOT USE a hydrochloric acid cleaner. It will burn or stain the stainless steel permanently.</b></p>
<b>Step 4</b>	<p>Apply the stainless steel cleaner to a white cotton cleaning cloth. Wipe with the grain of the stainless steel. Remove any excess with the clean side of the cloth.</p> <p><b>Note:</b> Do not use a microfiber cloth to apply the stainless steel cleaner. It is designed to absorb liquids and it will remove the stainless steel cleaner from the surface.</p> <p><b>Note:</b> Do not over spray cleaner on the floor or carpet. This may stain the carpet and make the floor slippery.</p>
<b>Step 5</b>	Return all tools to the storage closet. Clean tools and place them in their proper place.
<b>Step 6</b>	Remove PPE and wash your hands thoroughly.

<b>Safety Products and Tools</b>
<input type="checkbox"/> Nitrile gloves <input type="checkbox"/> Safety glasses, goggles or face shield

<b>Product List</b>
<input type="checkbox"/> Stainless steel cleaner or baby oil <input type="checkbox"/> Microfiber cloths <input type="checkbox"/> White cotton cleaning cloths <input type="checkbox"/> White or green abrasive pad <input type="checkbox"/> Water-based all-purpose cleaner <input type="checkbox"/> SDS sheet for chemicals



Procedure No. SOP S107	Cleaning Stainless Steel - Standard Operating Procedure (SOP)
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<b>Step 1</b>	Put on safety glasses and gloves.	<b>Safety Products and Tools</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Nitrile gloves</li> <li><input type="checkbox"/> Safety glasses, goggles or face shield</li> </ul>
<b>Step 2</b>	Gather all equipment, chemicals and tools.	
<b>Step 3</b>	<p>Spray the stainless steel with an all-purpose cleaner or use pre-moistened microfiber cloth or pad.</p> <p>Remove the old stainless steel cleaner or oil and debris using a clean microfiber cloth. Allow the stainless steel to dry.</p>	
<b>Step 4</b>	<p>Apply the stainless steel cleaner to a white cotton cleaning cloth. Apply it to the stainless steel. Wipe with the grain of the stainless steel. Remove any excess with a clean side of the cloth.</p> <p><b>Note:</b> Do not over spray it on the floor or carpet. This may stain the carpet and make the floor slippery.</p> <p><b>Note:</b> Do not use a microfiber cloth to apply the stainless steel cleaner. It is designed to absorb liquids and it will remove the stainless steel cleaner from the surface.</p>	<b>Product List</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Stainless steel cleaner or baby oil</li> <li><input type="checkbox"/> Microfiber cloths</li> <li><input type="checkbox"/> White cotton cleaning cloths</li> <li><input type="checkbox"/> Water-based all-purpose cleaner</li> <li><input type="checkbox"/> Water-based degreaser</li> <li><input type="checkbox"/> SDS sheet for chemicals</li> </ul>
<b>Step 5</b>	If you are cleaning large stainless steel columns or walls you may want to use an extension pole with a flat mop or flexible doodle bug holder. Follow steps 3-4 for larger stainless steel surfaces.	
<b>Step 6</b>	Return all tools to the storage closet. Clean tools and place them in their proper place.	
<b>Step 7</b>	Remove PPE and wash your hands thoroughly.	



Procedure No.  
CSOP S108

## Cleaning White Boards - Standard Operating Procedure (SOP)

<b>Step 1</b>	Put on safety glasses and gloves.
<b>Step 2</b>	Gather all equipment, chemicals and tools.
<b>Step 3</b>	<p>Fold the microfiber cloth. Spray the white board cleaner on the cloth. Test the chemical in a small area to see if it is effective at removing the marker lines or smearing from the white board. If the chemical is effective, you can clean the entire board.</p> <p><b>Note: Do not use abrasive cleaners, harsh solvent, or abrasive pads on the white board that will scratch the protective surface.</b></p>
<b>Step 4</b>	<p>Apply the white board cleaner to the microfiber cloth. Do not spray it on the board using a fine mist as it may become respirable and cause chemical streaking.</p> <p><b>Note: Do not over spray it on the floor or carpet. This may stain the carpet and make the floor slippery.</b></p>
<b>Step 5</b>	Wipe the board vertically and horizontally until the surface is clean. Flip the cloth often and reapply the cleaner as necessary. Change cloths as they become loaded.
<b>Step 6</b>	<p><b>Note:</b> If you are cleaning large amount of white boards you may want to use an extension pole, doodle bug holder and microfiber doodle bug pad.</p> <p>A microfiber pad and trowel is also useful for cleaning large whiteboards in conference rooms and classrooms.</p>
<b>Step 7</b>	Return all tools to the storage closet. Clean tools and place them in their proper place.
<b>Step 8</b>	Remove PPE and wash your hands thoroughly.

### Safety Products and Tools

- Nitrile gloves
- Safety glasses, goggles or face shield

### Product List

- Expo white board cleaner or manufactured approved white board cleaner
- Alcohol based glass cleaner
- Microfiber cloths
- Microfiber trowel
- Microfiber trowel pad
- SDS sheet for chemicals

