

Fairfield Board of Education  
**Purchasing Manual**

**2020-2021**

**Board Approved**

## **Introduction**

The purpose of this Purchasing Manual is to assist all Board of Education employees in the appropriate purchasing practices and 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 Policy;**
- **Other federal, state law and code;**
- **Local Finance Notices – NJ Division of Local Government Services**

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

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

We ask you, the user of the purchasing system, to help achieve these goals through:

- Proper planning.
- Please allow yourself enough time between generating a purchase order and the actual date materials or services are needed.
- Please think of purchasing in terms of a whole year. What items and services do you need on an annual basis?
- Through proper planning, we can eliminate much of the frustration that is encountered in all public school purchasing procedures.

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

Sincerely,

William Gerson  
Interim School Business Administrator/Board Secretary

# Requisition Step by Step



**EDU-MET.**  
**INTEACTIVE SYSTEMS\_CO.**

## **REQUISITION DOCUMENTATION**

**2020-2021**

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Every effort has been made to ensure that the information in this guide is correct.

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## Welcome to Edumet Oracle Requisition Application

The Edumet Requisition Application is an application designed to keep track of accounts payables, accounts receivables, and purchasing. It is also used to generate bill list checks for the different vendors used within the district.

### About this user's guide

To help the user easily locate and interpret the information on this guide, the following conventions are used:

#### Text Formatting Conventions

<b>[Button]</b>	Indicates a button within the system
<b>&lt;KEY&gt;</b>	Indicates a key on the keyboard
<b>MON-DD-YYYY</b>	Type in the date using three letters for the month, two digits for the day, and four digits for the year. Example: JAN-30-2008

#### Navigation Conventions

Click	Place the mouse pointer over an item and press the left mouse button once.
double-click	Place the mouse pointer over an item and press the left mouse button twice.
<b>&lt;ENTER&gt;</b>	Refers to the Enter key on the keyboard
<b>[PREVIOUS]</b>	Allows you to go to a previous item depending on the screen that you are in
<b>[NEXT]</b>	Allows you to go to the next item
<b>[ADD]</b>	Allows you to add a new item
<b>[DELETE]</b>	Allows you to delete an item as long as there is not history
<b>[FIND BY]</b>	You can search for items using different find by options.
<b>[EXIT]</b>	Allows you to exit the screen and the system takes you back to the previous screen.
<b>[AUDIT]</b>	This screen keeps track of all the changes made to the particular screens.

## Logging In

- To Login to Edumet Oracle



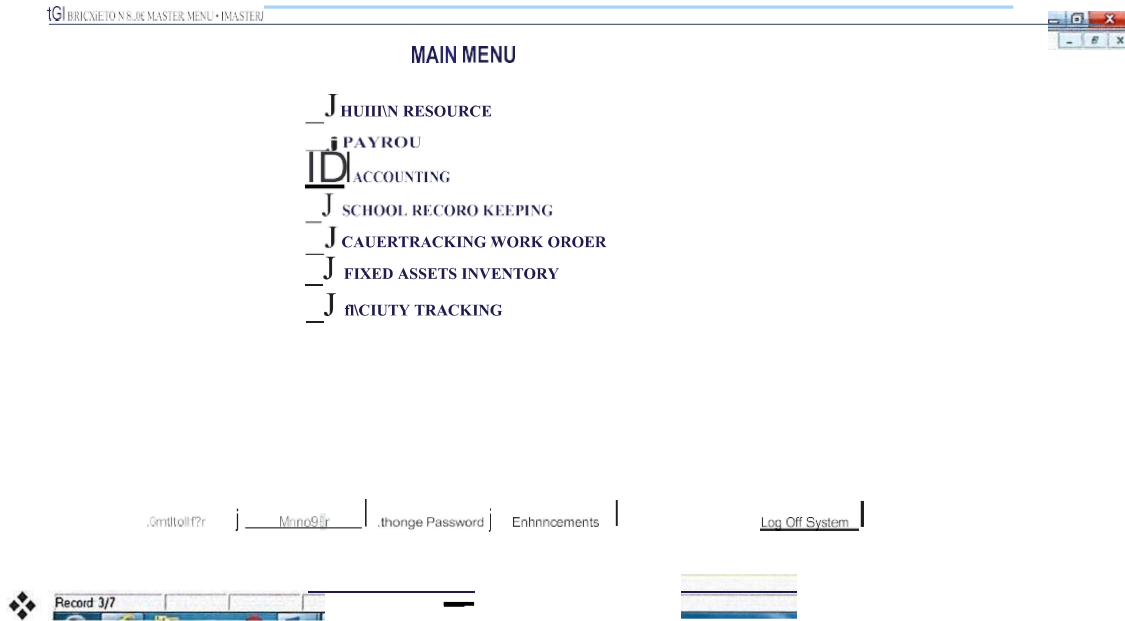
Edu-Met Master.Ink

1. Double-click the Edumet Master Icon on your computer's desktop.  
The user will see a window in where you have to type your **Username**, **Password**, and **Database**.

A screenshot of a 'Logon' window. The window has a title bar with 'Logon' on the left and 'EI' on the right. It contains three input fields: 'Username:', 'Password:', and 'Database:'. Below the fields are two buttons: 'Connect' and 'Cancel'.

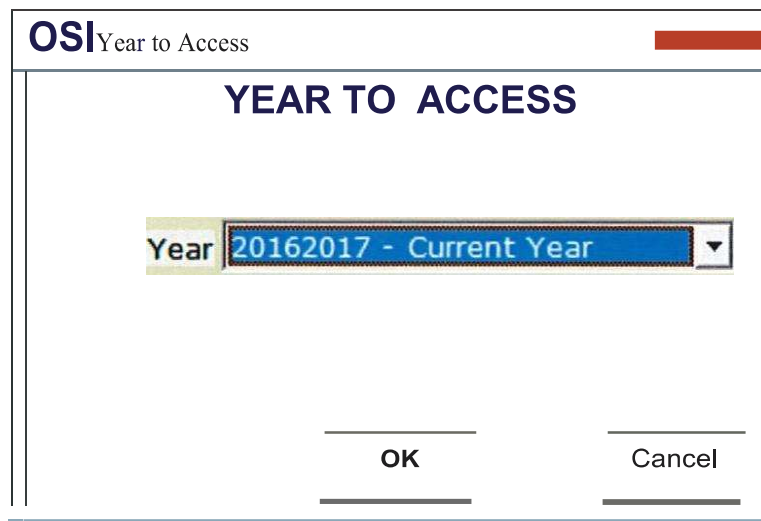
2. Place the cursor in the Username field, type in your username and press <TAB>
3. Type in your Password, which will appear as asterisks on the screen to maintain confidentiality, and then press <TAB>
4. Type **edumet** in the Database field. You can now click [**Connect**] or press <ENTER>

•• Select Edumet Accounting Package



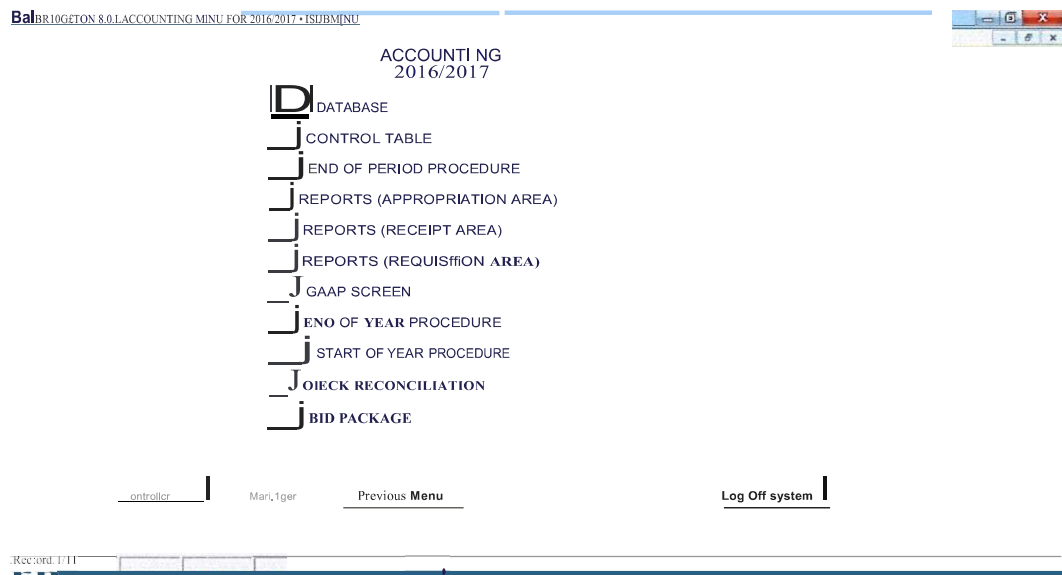
1. **YEAR TO ACCESS** : Click on **ACCOUNTING** . They system displays the **YEAR TO ACCESS** window with year defaulted to the current year.

2. Click on **[Ok]**. They system will now take you to the main **ACCOUNTING** screen.



## ACCESSING DIFFERENT AREAS OF THE ACCOUNTING PACKAGE

### •• List of Accounting package main areas

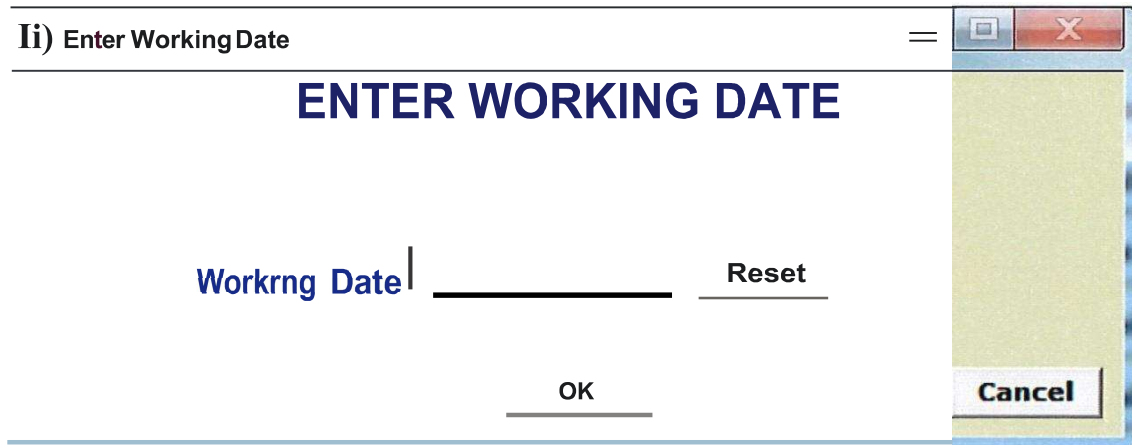


1. The accounting package is composed of Eleven main areas. Access to these areas depends on the security given to the users. If you don't have access to a particular area you will get a message stating that 'permission denied'.
  1. **Database**
  2. Control Table
  3. End of Period Procedure
  4. Reports (Appropriation Area)
  5. Reports (Receipt Area)
  6. Reports (requisitions Area)
  7. GAAP screen
  8. End of Year Procedure
  9. Start of Year Procedure
  10. Check Reconciliation
  11. Bid Package
2. Most of the work will be done in the **DATABASE** and this is where you will spend most of your time. The database contains the following screens:
  1. Accounts
  2. Vendors
  3. Purchase orders
  4. Receipts
  5. Requisitions
  6. Online check print
  7. GAAP closing
  8. General Journal
  9. View Journals and Ledgers
  10. Budget Build
  11. Request for Appropriation transfer
  12. Control File

•• The Database is the main screen of the Accounting Package

1. When you first click on the DATABASE button you will see a window that asks you to 'ENTER SYSTEM DATE '. This is the date that your transactions will be stamped with. The system defaults to the current date, so if you want to use this date simply click [Ok].

2.



3. If you want to change the date, click on the date that is already displaying and change it to the date that you want your transactions to be stamped with and then click [OK]. Also notice that the date format is **MON-DD-YYYY**.

4. You should now be in the DATABASE screen where you should see all the items mentioned on page 5 number 2.

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•• REQUISITIONS:

Click [VENDOR INFO] to enter and view vendor information

The screenshot shows a software interface for requisitions. At the top, it displays 'REQUISITION' and 'EDUMET'. Below this, there are fields for 'SYSTEM DATE' (FEB-09-2004), 'LOGIN YEAR' (20032004), 'REQ #' (03ED650), 'DATE CREATED' (JUL-03-2003), 'ACTUAL DATE' (MAY-21-2003), 'LOCATIONS', 'DEPARTMENT', 'REQUESTED BY' (EDDATA), and 'BATCH' (EDDATA). A table lists items with columns for QTY, DESCRIPTION, UNIT COST, TOTAL AMT, and RECD. The total amount for the requisition is \$2,869.24. On the right side, there is a 'VENDOR INFO' section for 'A-TECH RESTORATION, INC.' and a 'DISB. ACCTS' section showing \$2,869.24. Below the table, there are buttons for 'CONFIRM', 'PRINT REQ?', 'PRINT PO?', 'FIXED ASSETS', 'FIND BY REQ NUMBER', and a row of navigation buttons: 'REQ', 'PREVIOUS', 'NEXT', 'ADD', 'CANCEL', 'COPY', 'PRINT', 'PAGE', 'ADD', 'PREVIOUS', 'NEXT', 'DELETE', 'AUDIT', and 'EXIT'. The 'EXIT' button is highlighted in red. Callout boxes point to the 'VENDOR INFO' button, the 'DISB. ACCTS' field, the 'APPROVE' button, the 'ADD' button, the 'COPY' button, and the 'ADD' button in the navigation row.

Any order placed prior to final approval, or by anyone other than the Purchasing Office, may be denied, and therefore not paid or reimbursed by the Board of Education. **UNAUTHORIZED PURCHASES MADE THROUGH THE ISSUANCE OF "CONFIRMING ORDERS" BY UNAUTHORIZED PERSONNEL ARE NOT ALLOWED, AND ARE IN VIOLATION OF STATE STATUTES. DELEGATION OF AUTHORITY TO REQUEST CANNOT REPLACE CENTRAL ISSUANCE OF ORDERS AND ENCUMBRANCES. ORDERS WITHOUT A PURCHASE ORDER ARE NOT LEGAL PURCHASES AND CAN BE REPUDIATED. PLEASE SEE THE TWO LETTERS THAT FOLLOW.**

1. Adding Requisition:

- A. To add requisitions click [ADD] Select appropriate Multi-Approval Step on pop up menu. The system assigns requisition number, date created, and actual date.
- B. <TAB> over to the [REQUESTED BY] field. This field is used to store the person's name that is requesting the purchase and will appear on the bottom of the approved purchase order.
- C. <TAB> over to the [BATCH] field. The system automatically shows the person's username as the batch number.
- D. <TAB> over to the [QTY] field and enter the quantity.
- E. <TAB> over to the [DESCRIPTION] and enter the description

- **YOU CAN NO LONGER SUBMIT AN ORDER WITH AN ATTACHED LIST.**

Include a description of the purchase along with an item number, product number, confirmation number, or reservation number when applicable.

Please read the catalogue or contact the vendor to determine the actual shipping and handling costs.

**20% Estimated Shipping and Handling"** must appear in the Description Column if shipping costs are unknown; enter shipping in the amount column

**"Shipping & Handling Included"** must appear in the Description Column if shipping is included.

- o Type **NO BACK ORDERS** on all requisitions for Library Books. This will eliminate waiting till year end to find out back orders have been cancelled. As soon as you are notified that books are not currently available, you may reorder .

- F. <TAB> over to the [UNIT COST] and enter the unit cost.
- G. <TAB> over and you will see that the [TOTAL AMT.] gets calculated automatically.
- H. To use the second line, <TAB> over or use your mouse to click on the column that you want to use.

Click [ADD] to add a new requisition



## REQUISITIONS

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- **FORMS WERE SENT TO “EVERYONE” VIA E-MAIL AND ARE ALSO AVAILABLE IN THE MAIN OFFICE**

— **PLEASE SEE SAMPLES FOLLOWING THIS PAGE**

• **FIELD TRIPS**

**BE SURE TO REVIEW FIELD TRIP POLICIES WHICH CAN BE FOUND APPROVED IN POLICY #6153. ALL FIELD TRIP REQUESTS MUST BE SUBMITTED IN TIME FOR THE NOVEMBER BOARD MEETING. PLEASE ALLOW SUFFICIENT TIME FOR PROCESSING.**

- When placing a field trip request, please follow the below procedures:
- E-mail the Board Clerk with the Field Trip information including # of buses requested, # students, # of Teachers/Aides that will be attending ( If nurse is attending specify reason/explanation)
- After you are provided with the Bus Quote information, fill out the on-line Requisition form and include the transportation cost.
- Place all Field Trip requests in respective Assistant Principal's secretary's mailbox and send pdf for review with all necessary paperwork attached.
- Assistant Principal’s Secretary will review hard copy and place in Assistant Principal's mailbox
- Assistant Principal will review and sign
- Assistant Principal will place signed copy in Superintendent's mailbox and/ or email pdf to Superintendent `s Secretary to place on board agenda if applicable
  - o Select FIELD TRIP from the Multi-Approval Step
  - o Enter requisition(s) as instructed above for all costs associated with the field trip; i.e. transportation, admission, meals
  - o Print Requisition(s) and attach supporting documentation if applicable
  - o Enter requisition(s) number(s) on field trip approval form
  - o Forward all forms to Superintendent/Principal’s office for approval
  - o Determine if vendor accepts purchase orders in lieu of payment or if payment is required in advance, (See Attachment H) **and that any deadline can be met**
  - o Field trips that require payment in advance need the requisition entered no less than eight (8) weeks before the trip.

•• **PROFESSIONAL DAYS**

- o Select PROFESSIONAL DAY from the Multi-Approval Step
- o Enter requisition(s) as instructed above for all costs associated with professional day; i.e. registration , transportation, admission, meals
- o Print Requisition(s) and attach supporting documentation if applicable
- o Identify requisition(s) number(s) on professional day request form.
- o Forward to Superintendent/Principal’s office for approval
- o Determine if vendor requires payment in advance, or if our purchase order is acceptable in lieu of payment. Identify **any deadlines and communicate them**



**NOTE:** All field trips not specifically identified in policy 6153 and overnight Professional Development require Board approval and **cannot** be processed until such approval is obtained. **(School Board members and school district employees may attend in-state conferences and receive reimbursement for lodging and meal costs if the event is outside a 50 mile radius from their home and a waiver has been obtained from the State Department of Education. If an individual pays for a professional day in advance, (prior to Board approval) he or she must wait for Board approval for reimbursement.** Again, please advise if arrangements have already been made with your workshops, hotels, etc. and provide confirmation numbers, if available. If the Board does not approve the trip, there will be no reimbursement. Please plan appropriately and submit your requisitions at least six weeks prior to the board meetings, held on the second Thursday of each month. This will make it possible to process the paperwork and issue payment in time for the event, even if prepayment is necessary. **NO HAND CHECKS WILL BE ISSUED DUE TO LATE SUBMISSION OF REQUISITIONS OR PURCHASE ORDERS.** In addition, do not submit ratifications for Board approval

**VOUCHERS ARE ONLY TO BE USED FOR THE FOLLOWING:**

**TRAVEL REIMBURSEMENT, PETTY CASH, COURSE REIMBURSEMENT AND SHIPPING EXPENSES (POSTAGE AND FEDERAL EXPRESS CHARGES, AND UPS CHARGES).**

- o Select VOUCHER or VOUCHER CONTRACT from the Multi-Approval Steps
- o Enter requisition(s) as instructed above, for all costs related to reimbursement.
- o Print Requisition(s) and attach supporting documentation.
- o Forward to Purchasing for processing

• **INTERNET PURCHASING**

With the advance of technology, Internet purchasing has become commonplace. Although you cannot place your orders on line, you can obtain pricing from sites that will accept our purchase orders. Please check with the vendor to confirm that they do not need payment in advance.

Unfortunately, Internet pricing is variable and what you see on sale today may not be the same price by the time the requisition goes through the approval path. Please check with the vendor to see how long the quoted price will be honored. Print out the page from the site and attach it to the requisition to make sure that the correct items with the correct prices will be ordered.



Fairfield Township School

#### Professional Day Request Procedure

It is the responsibility of the staff member to electronically submit the Professional Day (PD) Request Form 30 days before the scheduled Professional Development (especially if there is a registration fee) to the Superintendent/Principal. If advance payment is required, the professional day and requisition must be submitted 90 days before the scheduled Professional Development. The Professional Day Request will be denied if it isn't received in sufficient time to process the registration fee. If an overnight stay is being requested, it must be approved by the Board of Education prior to the staff member's absence. For overnight requests, the Professional Day Request is to be submitted to the Superintendent/Principal no less than ten (10) days prior to the Board-submission deadline date established by the Superintendent /Principal (principals/supervisors have this information). A completed purchase order is required prior to attending the Professional Development.

#### **Staff Member Responsibility:**

- Staff Member will register for PD
- Staff Member requesting to attend PD, must complete on-line Professional Development Form/Requisition Form. (All requests must be in saved in pdf format)
- Form and supporting documents are given to grade level secretary.
- Grade Level Secretary will create a requisition in edumet and will give/send PD request/forms to corresponding Assistant Principal for Approval. (Registration fee and Mileage reimbursement (if applicable will be requisitioned in edumet)
- PD Request/forms are sent to Superintendent/Principal's office for Superintendent/Principal approval.
- Admin Asst. will place approved PD's on board agenda for Board approval.
- After PD has been board approved, Admin. Asst. will type a PD approval memo to requester and place memo in their mailbox.
- The requisition for the PD will be given to the Board Clerk for edumet approval and will create a Purchase Order. The board clerk will place the blue copy of the purchase in the requester's mailbox and send an email to the requester confirming PD approval.
- If the PD was not Board approved, it is the responsibility of the requester to cancel their attendance at the PD.
- Staff member attending is responsible for entering absence into ESS.

#### **Professional Day Request General Information**

- Improved student achievement is the desired result of professional growth.
- Professional Day experience will be reflected in his/her instruction and it will be discussed as part of the supervisory process.
- Professional days are to be related to the PGP, PIP, School-level Professional

Development Plans, District Professional Development Plans, Unified Plans, Curriculum Committees, or specific professional development activities assigned by an administrator.

- Prior to submitting a Professional Day Request, staff members must review with Principal/Supervisor the District Professional Development Calendar. Requests necessitating a substitute shall not be approved on those days that already have 3 substitutes listed on the Professional Development Calendar.
- Teachers will be asked by the Principal to share information learned at workshops, committee meetings, and seminars via faculty meetings or in some written form.
- No staff member should register for any workshop or conference prior to receiving approval from the Superintendent/Principal and Board of Education as required.
- Determine if the organization will accept purchase orders in lieu of advance payment. If advance payment is required, it is the employee's responsibility to pay the upfront cost of the workshop or conference and then submit for reimbursement afterwards. No expenses will be reimbursed without detailed receipts and completed "What I Learned" forms.
- Any employee submitting for mileage reimbursement must have a copy of their current driver's license and insurance on file in the business office prior to submitting for reimbursement.
- There is no meal reimbursement for same-day travel.
- Lodging for overnight travel will only be approved for out-of-state or in-state that has been approved by the commissioner (note: the vendor applies to commissioner for approval of the conference/workshop not the staff member) where home-to-event is greater than 50 miles (by most direct route).
- District funds shall not be committed for overnight expenses prior to Board approval. The Board will not be responsible for reimbursing an employee whose professional day is denied. No requisitions for registrations, airfare, etc., will be processed by the business office unless an approved copy of a Professional Day Request Form is attached.
- The Superintendent/Principal will monitor and update the District Professional Development Plan.
- Staff members will maintain a copy of the approval form for attachment to Annual Professional Development Hours Record Form.

### **Account Numbers**

If the Professional Day Request is being generated at the school-level, the board clerk will provide staff member(s) with the account number(s) and requisition number(s) and the staff member(s) will complete the electronic Professional Day Request Form and call Source 4 Teachers. The Requisition (if applicable) will be input into edumet by the assistant principal's office staff. The Superintendent/Principal must approve the electronic Professional Day Request Form and requisition (if applicable) in Edumet.

If a District Administrator is conducting/sponsoring a district-level session, he/she will develop a list of participants and notify Principals /Staff Members. Staff Member will be responsible for completing the Professional Day Request Form and calling the Teachers' Registry. If a cost is involved and a requisition is required, the account number and cost will be provided by the District Administrator for Staff Member(s) to place on the Professional Day Request Form. Once the Professional Day Request(s) are approved, the staff member coordinating the program will be responsible for completing the requisition(s)/ensuring the requisition is completed.

The electronic copy of the staff member's approved Professional Day Request Form will be maintained in a database. When approval is received, it is the responsibility of the staff member to pre-register (if necessary).



Fairfield Township School

**TO:** All New Employees  
**FROM:** William M. Gerson, Interim School Business Administrator /Board Secretary  
**SUBJECT:** Purchasing Procedures for School Year 2020-2021

**PROCEDURE:**

**QUOTATIONS:** When a single item or service, or group of like items costs from 15% of the bid threshold (\$6,000) to the bid threshold (\$40,000), a minimum of two (2) written quotations are required. As part of the new requisition system in EduMet, it is possible to print out quotations. These printed quotes may then be sent to the vendors you choose for pricing.

**Note the following:**

- **\$6,000 - \$17,499 requires two written quotes**
- **\$17,500 - \$39,999 three formal written quotes are required. The quotes must be submitted with the requisitions. Form c.271 Political Contribution Disclosure Form (PCD) must be on file 10 days prior to contract award.**
- **\$40,000 and above (Formal solicitation process-Bid or Request for Proposals (RFP))**
- **Transportation bid threshold - \$18,800**

**BIDDING PROCESS:** When a single item or a group of like items is at the bid threshold or greater, the formal bidding process through the Purchasing Agent's Office is required. Building Principals or Program Supervisors are responsible for providing the Purchasing Agent with **detailed** specifications and a list of vendors (if requested) for each item or service being purchased. The process takes approximately **six to eight** weeks from the date the Interim Business Administrator/Board Secretary's office receives the request and specifications.

**NOTE: \$40,000 and over must be bid unless under State Contract.**

**STATE CONTRACTS:** If the vendor has a State Contract number for the products being purchased, no quotes or bids are necessary. The State Contract number, however, must appear on the Purchase Order.

**OTHER ITEMS:** The purchase of any single item or service not falling into one of the above categories must be processed on a Requisition, which will be approved by the Interim School Business Administrator/Board Secretary and the Superintendent/Principal prior to the purchase. This means that there will be no Purchase Orders authorized by a telephone call by a principal, supervisor, teacher or other staff member. Again, unauthorized purchases made through the issuance of "confirming orders" by unauthorized personnel are not allowed, and in violation of State statutes. Please refer to the two letters included in this manual regarding unauthorized purchases. If an emergency arises, the order must still be entered as a requisition and through all electronic approvals prior to the actual purchase. Emergency Purchase Orders will be few and far between and will not replace good planning.



Fairfield Township School

**TO:** All Administrators, Principals,  
Supervisors and Department Heads

**FROM:** William M. Gerson  
Interim School Business Administrator/Board Secretary

**RE: EMPLOYEE OWNED BUSINESSES**

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At their December 17, 2001 Board Meeting, the Fairfield Board of Education voted to adhere to the terms of N.J.S.A. 18a:6-8. This statute disallows school districts from doing business with companies that are owned by District employees unless Superintendent/Principal approval has been obtained.

**18A:6-8**

Interest of school officers, etc., in sale of textbooks or supplies; royalties. No person officially connected with, or employed in, the public school system of this state or in any state educational institution 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 use in the school district or in the state educational institution 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.

# Fairfield Township Board of Education District Policy Manual

**Community Relations**

**Series 1000**

**Soliciting Funds from & by School Personnel**

**Policy 1314.1**

Date Adopted: December 17, 2009

Date Revised:

Page 1 of 1

## Solicitations by Staff

Staff members must refrain from using their positions in the school district for personal gain and for soliciting support of parents/guardians or pupils in the district for projects or enterprises in which the staff member is directly or indirectly involved, except as may be approved by the Superintendent of Schools.

## Solicitations of Staff

In the interest of preventing the exploitation of staff, solicitation of staff by whatever source is prohibited during the school day on school grounds unless approval in writing is obtained from the Superintendent of Schools.

## Solicitation by Pupils

It is the policy of the Board to permit in-school sponsorship of only those solicitations that have educational value for the pupil and which do not interfere with the educational program. All activities must have the approval of the Superintendent of Schools.

## Solicitations of Pupils

In the interest of preventing the exploitation of pupils, solicitations by outside organizations, commercial enterprises and individuals are prohibited on school grounds both during and after school hours.

Outside organizations are not permitted to advertise events or sell products through the schools or use the children to sell tickets and/or products except those events jointly sponsored with a school and school-approved parents-teacher activities, and those specifically approved by the Superintendent of Schools.

## Legal References

NJSA 18A:11-1 General mandatory powers and duties  
52:14-15,(9c)1 Public Employee Charitable Fundraising Act

## Possible Cross References

1314, 3453



# Fairfield Township Board of Education District Policy Manual

**Community Relations**

**Series 1000**

**Posting & Distributing Materials to Pupils & Staff**

**Policy 1315**

Date Adopted: December 17, 2009

Date Revised:

Page 1 of 1

## Posting of Non-School Related Materials

The Board of Education shall permit posting of non-school materials with the approval of the Superintendent of Schools

The Board of Education will permit posting of such materials in an area designated for community information for:

- A. Groups directly related to the schools and the operations of the school;
- B. Organizations indirectly related to the schools;
- C. Departments or agencies of the municipal government;
- D. Other government agencies; and
- E. Community organizations, based in Fairfield Township and formed for charitable, civic or educational purposes.

The Board of Education will permit distribution of materials under the following conditions:

- A. No organization may distribute materials to students or staff without prior approval of the Superintendent of Schools. Approval of the Superintendent of Schools will typically be granted for the distribution of materials to students from organizations whose members' ages are comparable to the ages of our students. It is preferred that organizations have national sponsorship, and the information to be distributed must directly involve/benefit the students who are to receive it. Organizations approved for distribution are limited to: The Boy Scouts of America, the Girls Scouts of America, Little League Baseball, local soccer, etc.
- B. Students may not distribute materials to other students that advertise the activities of outside organizations without the permission of the Superintendent of Schools/designee;
- C. Students may not distribute materials, including personal invitations, during class time.

The posting or distribution of non-school related materials shall not be granted for the advantage of any commercial or profit-making organization, partisan organization, individual, private social functions or any purpose which is prohibited by law.

The Superintendent of Schools or Board of Education may refuse to grant permission to post or distribute materials whenever in their judgment there is good reason why permission should be refused. They shall not be required to give a reason for such refusal.

Authorization for posting or distributing materials shall not be considered as an endorsement of or approval of the activity, person, group or organization nor the purpose they represent.

### Legal References

NJSA 18A:11-1 General mandatory powers and duties  
18A:42-4 Distribution of Literature

**METHODS OF PROCUREMENT  
2020-2021**

**Bids (Purchases that exceed the bid threshold - \$40,000)**

This method is used for contracts for goods, services, materials and public work projects that exceed the bid threshold of \$40,000.

**Examples**

Building Services Department

Plumbing, Electrical, HVAC work  
Custodial Supplies  
Public Works Projects

Technology

Computer Supplies/Equipment  
Printers/Computer  
Interactive Boards

Food Services Department

Groceries and Canned Goods  
Pest Control Services Baking  
Goods -Rolls, Bread Milk

Title I Testing

Test Scoring Services

District

Furniture  
AV Equipment  
Calculators

Athletics

Athletic Supplies/Equipment  
Physical Ed Supplies/Equipment

Lowest Responsible Bidder -The common thread of all bids is that the district has to award the bid to the lowest responsive, responsible bidder, which means the lowest price.

**Quotations -Purchases that fall between \$6,000 and \$39,999**

This method of procurement is used for contracts for goods, services, materials and public work projects that in the aggregate between \$6,000 and \$39,999.

**Examples**

Athletic Wear  
Fax Machine Supplies  
Two Way Radios  
Fitness Equipment

The contract is awarded based upon the lowest price **and the availability of the vendor to deliver service and materials in a timely manner.**

**Request for Proposal -RFP-** Sample included in manual

This method of procurement is preferred for the following contracts:

Professional

Services Medical  
Auditor  
Attorney

Engineer, Architect

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nstructional Services  
Educational Services  
Professional Development

The RFP method is designed to award the contract to the vendor based upon a list of criteria which include:

- Management Criteria  
Business organization; staffing  
Experience; and  
Knowledge of service requested
- Technical Criteria  
Submission of narrative how firm will provide services, planned approach;  
measurable results  
Understanding how services will be provided
- Cost Criteria  
Fee proposal submission; cost analysis

An RFP contract does not have to be awarded to the respondent who submits the lowest price. The district administrator provides an evaluation scoring of each respondent using the criteria as a basis of award.

#### **Competitive Contracting - Certain contracts over \$40,000**

This method is used for certain contracts over \$40,000.

The district can only use this method for contracts that are outlined in State Law and Code. Some of the examples that are permitted are:

Student Information System  
Student Data Warehousing

Professional Development Services  
Educational Instructional Services

The award of the contract is similar to the RFP award –prices and other factors considered.

#### **EUS - Extraordinary Unspecifiable Services**

This method is the procurement method for the purchase of insurance – Similar to the RFP process.

#### **Other Procurement Methods**

The district also uses the following methods of procurement

- State Contract Purchasing
- Emergency Contracts
- Cooperative Purchasing Agreements
- Shared Service Agreements
- Sound Business Practices

## **Bids and Purchasing**

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

This restriction is called the bid threshold or bid limit. The bid threshold is \$40,000. In essence any specific item, class of items, and/or services of a similar nature, purchased by the **school district totaling more than \$40,000 (aggregation) for the entire year must be competitively bid**. The restriction is **not set by location or schools; it is for the entire district**.

You cannot circumvent the law by splitting purchases to be under the \$40,000 bid limit.

If you find that your purchases may exceed the \$40,000 bid limit, please contact William M Gerson at ext. 8030.

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

All purchases and contracts exceeding the bid threshold shall be awarded by board resolution at a public meeting of the Board of Education. This includes all items exempted from bidding all State Contract purchases that exceed \$40,000. Only the purchase of textbooks and emergency contracts are exempt from the law.

## **Exemptions to the Bid Limit**

New Jersey State Law allows for some exceptions to the bid and quotation limits. Some of the exceptions include:

1. Purchasing through State Contract
2. Textbooks, kindergarten supplies, student produced publications, library and educational goods.\*
3. Legal notices, food supplies, milk, utilities, insurance, election expenses, travel and conferences.\*

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

Please contact the Purchasing Agent for further explanation.

## **Professional Services**

Professional service contracts that exceed \$6,000 for the school year must be procured through a competitive process. The district uses the Request for Proposal (RFP) method of procurement. Examples of professional services are:

Legal	Dental
Auditing; Accounting	Medical Evaluation
Architectural; Engineering	Physician; Nursing

**Academic Services**

Academic service contracts that exceed \$6,000 for the school year must be procured through a competitive process. The district uses the following methods of procurement:

\$6,000 - \$39,999	Request for Proposal (RFP)
\$40,000 or more	Competitive Contracting

Examples of Academic Services:

- Instructional Improvement
- Educational Consultants
- Professional Development

**Emergency Contracts**

Emergency contracts are strictly regulated by N.J.S.A. 18A: 1 8A-7. A situation must exist affecting the health or safety of the occupants of school property that requires the immediate delivery of articles or the performance of a service to alleviate the emergency.

The Interim Business Administrator/Board Secretary must be notified first of all emergency purchase requests.

**Quotations and Quotation Procedures**

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

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

The district shall receive two quotations if practicable. Evidence of the quotation process shall be kept on file. A copy of the quotation(s) shall be attached to the purchase order.

**Non-Essential and Prohibited Purchases**

- |  |                              |
|--|------------------------------|
| Carnivals                              | Retirement Plaques           |
| Gifts for Employees                    | Bereavement flowers; baskets |
| *Teacher appreciation gifts/activities | Student entertainment        |
| **T-shirts                             |                              |

- \*Recognition for teachers is allowable for a specific purpose i.e. perfect attendance
- \*\*T-shirts can only be purchased for student safety -i.e. recognition on field trips

The district does not purchase holiday and birthday pencils. If you wish to purchase these items, they must be purchased out of pocket.

Eighth Grade Step-Up - The district will only pay for cake and fruit punch.

## **STEP BY STEP DIRECTIONS FOR TYPING A REQUISITION IN EDUMET**

1. Log on to Edumet
2. Click on "Accounting"
3. Be sure current year is showing and click OK
4. Click on "Database"
5. Be sure current date is showing and click OK
6. Click on "Requisitions"
7. Click on Add (at the bottom left of screen) Select appropriate Multi-Approval Step on pop up menu
8. Type in the name of the person requesting the order (be consistent, as this will appear on the bottom of the PO), hit Tab
9. The Batch field should read your name, hit Tab
10. Enter the Quantity, hit Tab
11. Type in a detailed description of the item, hit Tab
12. Enter the unit cost for the item, hit Tab
13. Continue steps 11-14 until all of the items are entered
14. Click on Vendor Info at the right side of screen
15. At the bottom of the Vendor screen click on the arrow to bring up Vendor options, click on Vendor Name
16. Click to the left side of the % sign and type in the vendor's name (ex. Dell%) hit Enter
17. Be sure the Vendor's name that is highlighted is the one you want and click OK
18. Under 'Ship to Location', type in to who's attention the order is going to and hit Tab
19. Select location from the list by clicking to highlight the name and click OK
20. Click Return
21. Click on 'DISB ACCTS'
22. Click on Add Account
23. Type in account number to the left of the % sign (ex. 1 10002526100035%) hit Enter (Do not use dashes when typing in the account number)
24. Be sure the correct account number is highlighted and click OK
25. Type in the amount of the total order and hit Tab
26. Click Return
27. If you need to add a note to this Purchase Order, click Notes, type in your message and click Return
28. Under Approval Steps, click Approve
29. Now you can add another Purchase Order or exit out of the EduMet system

# Fairfield Township Schools

*Business Office  
375 Gouldtown-Woodruff Road  
Bridgeton, NJ 08302*

July 1, 2020

**TO: ALL FAIRFIELD BOARD OF EDUCATION VENDORS**

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## **UNAUTHORIZED ORDERS**

### **Official Notification**

#### **Authorized Purchases**

The Fairfield Board of Education only recognizes purchases made through the approved purchase order process. All purchases require a:

**Written Purchase Order** with **authorized signatures** and a **Purchase Order Number**.

#### **Unauthorized Purchases**

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

#### **Vendor's Responsibility**

- **Do NOT Honor Requests!**

Vendors are not to honor or accept any requests for goods or services unless the vendor receives a **written purchase order** with **authorized signatures** and a **purchase order number**.

- **Contact the Business Office!**

Please alert the Purchasing Department at (856) 453-1882 x 8017 if any Board employee attempts to place an order without an authorized purchase order.

- **You will NOT Get Paid!**

The Fairfield Board of Education will not be held responsible for any unauthorized orders or purchases.

#### **Authorized Signatures**

The Fairfield Board of Education will only recognize purchase orders signed by:

**William M. Gerson,  
Interim School Business Administrator/Board Secretary**



## **SCHOOL BUDGET FOR SCHOOL YEAR 2020 - 2021**

The items that are ordered district wide, and not via the regular Purchase Order process are: Copy Paper, Printing, Tissues and Printer Toner Cartridges. Please estimate your annual usage on the order forms provided and place your orders accordingly.

If you can generate any of the forms you use on your computer, please do so. Order forms for the following are included at the back of your package.

1. Copy Paper Order - 8-1/2" x 11" white copy paper will be ordered by the Purchasing Department to be stored on the loading doc. You may call the warehouse at any time to request the white paper for delivery. Any colored paper or different size paper listed on the enclosed inventory sheet is available for use as needed.
2. Tissue Order - Tissues will be delivered to your classroom upon request.

PLEASE NOTE: Periodicals will not be bulk ordered. A Purchase Order is required for individual subscriptions.

**Divider**

**RFPs**

Remember if you use a State contract, you do not need to obtain 3 quotes.

## REQUEST FOR PROPOSALS (RFP) FORMAT

### Request for Proposal (RFP)

The Request for Proposal (RFP) procurement method is used to procure contracts for services based upon an evaluative criteria selection process. The districts the evaluative selection process that is recommended by the State Comptroller of New Jersey. This evaluative management, technical and cost criteria selection process permits the Board of Education to award a contract for services to the respondent whose response will provide the highest quality service at fair and competitive prices.

Examples of When to Use the Request for Proposal (RFP)

<u>Activity Method</u>	<u>Amount</u>	<u>Procurement</u>
Academic Services (Local/State Funds)*	\$6,000-\$39,999 \$40,000 or more	RFP Competitive
Contracting		
Instruction Improvement		
Educational Consultant		
Professional Development		

\*Contracts with NJ State Colleges, School Districts and Government Agencies (when using local and state funds) do not require RFP procurement. A written proposal from the school or agency will suffice.

<u>Activity</u>	<u>Amount</u>	<u>Procurement Method</u>
Academic Services (Federal Funds)**	\$6,000-\$39,999 \$40,000 or more	RFP Competitive
Contracting		
Instructional Improvement		
Educational Consultant		
Professional Development		

\*\*When using Federal Funds, contracts with NJ State Colleges, School Districts and Government Agencies do require a competitive RFP process for contracts less than \$39,999 and the use of the Competitive Contracting mode for contracts \$40,000 or more.

<u>Activity</u>	<u>Amount</u>	<u>Procurement Method</u>
Professional Services	\$6,000 or more	RFP

The following services are examples of professional services:

Legal

Auditing; Accounting

Architectural; Engineering

Dental

Medical evaluations

Physician; nursing; medical

Other Services -The use of state and local funds will be used for the contract amounts. Please refer to Academic Services -Federal Funds amounts when using Federal Funds.

Recreational/Social Services	\$6,000 - \$39,999 \$40,000 or more	RFP Competitive
Contracting		
Computer software (Proprietary)	\$6,000-\$39,999 \$40,000 or more	RFP or Quotation Competitive
Contracting		Bid

The purchase of proprietary software is for Board of Education purposes, not academic purposes. An example of this would be Student Information systems and Business Office Financial Systems.

**Starting the Request for Proposal (RFP) Process - Appointment**

Administrators who need to procure services through the RFP process are to contact Mr. William Gerson (x 8030) for an appointment. Mr. Gerson will review the process so that the administrator has an understanding of the process and the timeframe associated with the process.

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## REQUEST FOR PROPOSAL (RFP)

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Title of Services

### YOU ARE RESPONSIBLE TO PROVIDE THE INFORMATION BELOW

**A. Purpose of Proposal**

This is where the required service is identified

**B. Scope of Service**

Fully describe all services you want the vendor to provide to the district. Please be very detailed. Think of everything you want the vendor to provide under the requested service. If you omit anything, it may cost the district extra money for the omitted services. The RFP should contain a clear and detailed statement of work.

**C. Qualifications of Respondents**

Please list all minimum qualifications that you want all vendors to 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.

**D. Contract Period**

Professional service contracts may not exceed 12 months.

**E. Coordination of Activities**

List the person who will coordinate the activities for the contract

**F. Fee Schedule –Payment**

Advise the consultant 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; per hour; per evaluation, etc.

**G. Evaluation Criteria**

The State Comptroller recommends that all proposals be judged on the basis of pre-determined, merit based evaluation criteria made known to the vendors before proposals are submitted to the district.

- I. Technical Criteria
  - II. Management Criteria
  - III. Cost Criteria
-

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***QUESTIONS TO BE CONSIDERED WHEN PREPARING  
SCOPE OF SERVICES***

- What are the goals of the service requested?
- How many sessions do we want from the consultant?
- What is the minimum number of staff required for the consultant to meet the needs of the district?
- What is the minimum amount of time to be devoted to the district to accomplish the task requested?
- How will the consultant's performance be evaluated?

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## ***SAMPLE SCOPE OF SERVICES***

### **A. PURPOSE**

The Fairfield Public Schools (district) is seeking proposals from qualified respondents as follows:

#### **Math Coach (Professional Development)**

The district requires the services of a (hereinafter referred to as the Consultant).

The district expects to award to a Consulting Firm with proven track record coaching teachers using the Everyday Mathematics program for grades 3-5. The coaching method shall be designed to move from demonstrating lessons to co-teaching and conclude with co-planned lesson plans to be presented by the district teacher. The presentation will be critiqued by the Consultant.

### **B. SCOPE OF SERVICE**

- Improve staff teaching methods and instructional strategies
- The coaching methods shall increase district and state student assessment scores.
- Each consultant shall do two (2) coaching sessions per day. Coaching sessions may be in the same school or two different schools.
- The Fairfield school district shall determine which teachers need coaching.
- Coaches shall work with each teacher individually, as assigned by the district.
- The consultant shall be evaluated base on the district administration and teacher feedback, walk through visits, and the attendance log completed at each school.
- The coach shall spend a minimum of 55 days (2 teachers per day) working with the district's math teachers during the 2012-2013 school year.

### **C. QUALIFICATIONS OF RESPONDENTS**

- The Consultant shall have a minimum of ten (10) years' experience as a Math teacher and possess a Master's Degree in Education.
- Must have a minimum of five (5) years of experience providing coaching services to public school districts.
- The chosen Consultant shall have Smartboard experience.
- The Consultant shall have demonstrated experience working in an urban school environment.

## **SAMPLE EVALUATIONFORM**

The Board of Education will use a one hundred (100) point system in evaluating all proposals. The criteria to be evaluated are identified below; the point value and criteria can be changed to accommodate the project.

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	<b>Category:</b>	<b><u>Total Value Points</u></b>
I.	<b>Total Point Value: Up to 45 points</b>	
	Management Criteria	_____
	A. Business Management	---
	B. Qualifications & experience of staff	---
	C. Availability of personnel	
II.	<b>Point Value: Up to 30 points</b>	
	Technical Criteria	_____
	<b>A.</b> Description of Services	---
III.	<b>Point Value: Up to 25 points</b>	
	Cost Criteria	_____
	A. Fee Proposal	---

Total Points: \_\_\_\_\_

Comments:

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Signature of Evaluator: \_\_\_\_\_

Date: \_\_\_\_\_

Title: \_\_\_\_\_

**Divider**

**Methods for Federal Funds**

**FEDERAL FUNDS  
METHODS OF PROCUREMENT**

The Federal Government requires that certain guidelines are followed when making purchases using Federal funds.

State Contract Purchases using federal funds is prohibited. The federal government does not recognize the New Jersey State Contract as a form of competitive pricing.

The purchasing office will be unable to purchase any goods or services provided by the NJ state contract when the district uses Federal funds. This will have a major effect on your purchase if you are purchasing

- Computers
- Copiers
- School Supplies
- Office Supplies

and other goods and services under the NJ state contract. Federal funded purchases using NJ state contract numbers and no additional quotes will be rejected.

Federal and State purchasing laws require "price or rate quotations from an adequate number of qualified sources."

All Federal requisitions must be processed through the Funded Programs Office. Purchases of goods and services using Federal funds must be properly planned and grouped together so that the Purchasing Office may solicit formal quotations or formal bids, depending on the total cost of the goods and services.

**Procurement Threshold More than \$40,000 - Board approval required**

The school district must prove competitions for all contracts exceeding \$100,000 when using federal funds. Methods of competition are as follows:

Public Works	Bid
Goods and Services	Bid
Professional Services	Request for Proposals (RFP)
Educational Services	Competitive Contracting
Instructional Services	Competitive Contracting
Professional Development	Competitive Contracting
Sole Source Non-Competitive (Proprietary)	Proposal, Board Resolution (Certification of Need)

**Food Service Contracts**

Federal procurement guidelines must be followed when purchasing for the following programs:

- National School Lunch Program
- School Breakfast Program
- Special Milk Program
- Summer Food Service Program
- Buy American

**METHODS OF PROCUREMENT USING FEDERAL FUNDS**

<b>Description of Goods/Services</b>	<b>Amount*</b>	<b>Procurement Method</b>
Goods and Services	Less than \$40,000	Quotation or Bid
Goods and Services	\$40,000 or more	Bid
Professional Services	Less than \$6,000	Simple Proposal
Professional Services	\$6,000 - \$39,999	Request for Proposals (RFP)
Professional Services	\$40,000 or more	Competitive Contracting
Educational Consultant Services	Less than \$6,000	Simple Proposal
Educational Consultant Services	\$6,000 - \$39,999	Request for Proposals (RFP)
Educational Consultant Services	\$40,000 or more	Competitive Contracting
Instructional Improvement Services	Less than \$6,000	Simple Proposal
Instructional Improvement Services	\$6,000 - \$39,999	Request for Proposals (RFP)
Instructional Improvement Services	\$40,000 or more	Competitive Contracting
Professional Development Services	Less than \$6,000	Simple Proposal
Professional Development Services	\$6,000 - \$99,999	Simple Proposal
Professional Development Services	\$40,000 or more	Competitive Contracting
Sole Source (Proprietary)**	Less than \$6,000	Simple Proposal
Sole Source (Proprietary)**	\$6,000 - \$39,999	Simple Proposal
Sole Source (Proprietary)**	\$40,000 or more	Proprietary Bid
Services provided by Government Units/Schools	Less than \$6,000	Simple Proposal
Services provided by Government Units/Schools	\$6,000 - \$39,999	Request for Proposals (RFP)
Services provided by Government Units/Schools	\$40,000 or more	Competitive Contracting

\*The amount is in the aggregate as determined by the Qualified Purchasing Agent.

\*\*Sole Source (Proprietary) goods/services is only recognized when using Federal Funds. Special documentation and certification is needed for this particular method.

**Identification of Federal Program**

The Federal Government requires that the particular Federal Program be identified on all purchase orders/requisitions, e.g. Title I, IDEA, etc.

Please ensure that the Federal Program is identified on all purchase orders/requisitions.

Divider

Travel



Fairfield Township School

**TRAVEL AND RELATED EXPENSES**  
Policy adopted 1/26/06, Revised 1/12/17

3335

**TRAVEL/REIMBURSEMENT POLICY**

The Board of Education recognizes that as part of its responsibility for the financial operation of the school district, all reimbursable expenses incurred by district employees and Board Members may be subject to audit and scrutiny.

Board Members receive no payment for their services. With Board approval, they may be reimbursed for out-of-pocket expenses incurred on Board business.

**Approved Types of Travel**

1. Staff Training and Seminars - include all regularly scheduled, formal residential or non-residential training functions, conducted at a hotel, motel, convention center, residential facility, or at any educational institution or facility.
2. Conventions and Conferences - are distinct from formal staff training and seminars, although some training may take place at such events. These are general programs, sponsored by professional associations on a regular basis, which address subjects of particular interest to an agency or are convened to conduct association business. The primary purpose of employee and/or Board Members attendance at conferences and conventions is the development of new skills and knowledge in a particular field related to the educational program of the school district.
3. Regular District Business - includes all regular official business travel, including attendance at meetings, conferences and any other gatherings that are not covered by the definitions included above.

### Travel & Related Expenses

Travel reimbursement will be paid only upon compliance with the Board's policy provisions and approval requirements. Board Members, trustees and employees shall only be reimbursed for work-related travel that is directly related to and within the scope of the Board Member's and employee's current work responsibilities. Board Members and employees shall only be reimbursed for travel that:

1. Promotes the delivery of instruction and is critical to the instructional needs of the school district or furthers the efficient operation of the school district,
2. Is educationally necessary and fiscally prudent, and
3. Is directly related to and within the scope of the Board Member's current responsibilities, and for school district's professional development plan.

As described in this policy, school district travel expenditures include, but are not limited to, all costs for transportation, meals, lodging, and registration or conference fees to and for the travel event. School district travel expenditures include costs for all required training and all travel authorized in existing school district employee contracts and Board policies. This includes, but is not limited to, required professional development and other staff training, required training for new Board Members, and attendance at specific conferences authorized in existing employee contracts.

### Travel Payments

Travel payments will be paid only upon compliance with the Board's policy provisions and approval requirements. The Board will not ratify or approve payments or reimbursements for travel after completion of the travel event. All Board Members and employees shall adhere to the following specifications to be considered for reimbursement:

1. Reimbursement may not exceed State travel reimbursement guidelines as established by the Department of Treasury in NJOMB circular letter 06-02 (found at <http://www.state.nj.us/infobank/circular/cir0602b.html>), including but not limited to the types of travel, methods of transportation, mileage allowance, meal allowance, overnight travel and supporting documentation.
2. Reimbursement must also be in compliance with OMB Circular A-87 (found at [http://www.whitehouse.gov/omb/circulars/a087/a87\\_2004.html](http://www.whitehouse.gov/omb/circulars/a087/a87_2004.html)). No reimbursement will be issued without submission of written documentation such as receipts, checks and vouchers detailing the amount of each expenditure. Such documentation must be submitted within a timeframe to be established by the Board.
3. Travel expenditures must be in compliance with State travel payment guidelines as established by the Department of Treasury and with guidelines established by the Federal Office of Management and Budget; except that those guidelines that conflict with the provisions of Title 18A of the New Jersey Statutes shall not be applicable, including, but not limited to, the authority to issue travel charge cards.
4. Board Members and employees shall provide within two weeks a brief report that includes, as appropriate, but may not be limited to, 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. This report will be submitted to the Superintendent/Principal or his/her designee.

In addition to the requirements above, employee travel to be reimbursable must be directly related to the employee's professional development. No district employee shall be reimbursed for travel and related expenses without prior written approval of the Superintendent/Principal and prior approval by a majority of the full voting membership of the Board (as set forth below).

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 the school district, reimbursement for lodging may be permitted only where the sponsoring organization obtains a waiver pursuant to the provisions of NJAC. 6A:23A-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 fifty (50) miles.

Where a travel event has a total cost that exceeds \$5,000, regardless of the number of attendees, or where more than five (5) individuals from the district are to attend a travel event out-of-state, the district shall obtain the prior written approval of the Executive County Superintendent. The Executive County Superintendent shall promptly review the request and render a decision within ten (10) working days.

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. The Executive County Superintendent shall promptly review the request and render a decision within ten (10) working days. It is expected that approvals will be rare.

#### Prior Approval Requirement

Board Members shall only be reimbursed for travel and related expenses that have received prior approval by a majority of the full voting membership of the Board, and is in compliance with N.J.S.A. 18A:12-24 and 24.1 of the School Ethics Act.

1. Specifically, a Board Member must recuse himself from voting on travel if the Board Member, a member of his/her immediate family, or a business organization in which he has an interest, has a direct or indirect financial involvement that may reasonably be expected to impair his/her objectivity or independence of judgment.



2. Also, a Board Member shall not: act in his/her official capacity in any matter in which he or a member of his/her immediate family has a personal involvement that is or creates some benefit to the school official or member of his/her immediate family; or undertake any employment or service, whether compensated or not, which may reasonably be expected to prejudice his/her independence of judgment in the execution of his/her official duties.
3. For employees, a Board of Education requires that travel occur only upon prior written approval of the Superintendent/Principal and approval by a majority of the full voting membership of the Board.
4. For regular business travel only, the Board of Education may authorize an annual maximum amount per employee for regular business travel for which Board approval is not required. As defined by law, “regular school district business travel” is distinct from “training and seminars” and “conventions and conferences.”
5. For Board Members, travel may occur only upon prior approval by a majority of the full voting membership of the Board and that the travel be in compliance with section 4 of P.L.1991, c.393(C.18A:12-24) and section 4 of P.L.2001, c.178(C.18A:12-24.1).

#### Travel Advances Banned

An employee of the Board, a Board Member, or organization, shall not receive an amount for travel and travel-related expenses in advance of the travel pursuant to N.J.S.A. 18A:19-1 et seq.

#### Travel Methods

When used in these regulations, the term “transportation” is meant to include all necessary official travel on railroads, airlines, buses, taxicabs, rental cars and other usual means of transportation. The provisions of this section apply to all travel, whether for regular district business or attendance at conventions, conferences, staff training and seminars.

1. Air Travel - Air travel is authorized when it is determined that air transportation is advantageous to the conduct of district business. The most economical air travel must be used, including the use of discounted and special rates. Charges for classes of service other than economy (i.e., Business or First Class) are to be considered privileged and ineligible except when travel in such classes is less expensive than economy, avoids circuitous routings or excessive flight duration and/or would result in overall transportation cost savings.
2. Rail Travel - When it has been determined to be advantageous to the conduct of district business, the most economical scheduling of rail travel is to be utilized.
3. Cruises - Participation in a conference, meeting or training event that is presented on a cruise ship is prohibited. Travel on a cruise ship as transportation to an event is also prohibited.
4. Ground Travel - Necessary taxicab charges are permitted. However, travel to and from airports and downtown areas should be confined to regularly scheduled shuttle service, whenever such service is less costly than taxicab service. If shuttle service between the airport and downtown destination is not available, taxicabs may be used. The rental of a “stretch limousine” is not authorized or reimbursable unless several travelers are sharing the expense, which proves to be less expensive than taxicabs, scheduled shuttle service or the use of a personally owned vehicle. Car rentals, either utilized for airport transportation or transportation at a conference, etc., are neither authorized nor reimbursable.

5. Special Conveyances - The rental or hire of a boat, aircraft or other special conveyance is allowed only when public or regular means of transportation is not available or when such regular means of transportation cannot be used advantageously in the interest of the district. In such cases, prior approval of the Superintendent/Principal is required. A satisfactory explanation must accompany these requests for approval.
6. Personal Vehicle (Mileage Basis) - Mileage allowance in lieu of all actual expenses of transportation is allowed. An employee traveling by his/her own automobile on official business at the rate authorized by the Board of Education or in an agreement between the Board and the employee's bargaining unit, provided such mode of travel is previously approved by the Superintendent/Principal. Mileage allowance will not exceed the mileage reimbursement rates. Parking and toll charges are allowed in addition to mileage allowance when accompanied by receipts.
7. Routing of Travel - All travel must be the most direct, economical and usually traveled route. Travel by other routes is allowed when official necessity is satisfactorily established in advance of such travel. In any case where a person travels by indirect route for personal convenience, the extra expense must be borne by the individual. Reimbursement for expenses must be based only on charges that do not exceed what would have been incurred by using the most direct, economical and usually traveled route.

Reimbursement for mileage to and from the site activity shall be measured from the school or the home of the employee or Board Member, whichever distance is shorter. In the case wherein the distance from the employee's home to the site activity is less than that traveled to and from the employee's work location, no reimbursement shall be made unless the activity takes place on a day that is not considered a normal work day.

New contracts that specify a mileage reimbursement and that have an effective date of July 1, 2008 or later, must specify that the reimbursement rate shall be that stipulated in the current NJOMB Travel Circular. All district travel reimbursement shall also be in accordance with the rate stipulated in the current NJOMB Travel Circular. Parking and toll charges are allowed in addition to the mileage allowance.

#### Lodging, Accommodations, Meals & Miscellaneous Expenses

When travel is deemed necessary, district employees and Board Members may be reimbursed for allowable and reasonable expenses for lodging, accommodations, meals and miscellaneous expenses incurred. Unless approved in advance by the Board or the Superintendent/Principal, no expenses in excess of these rates will be eligible for reimbursement.

#### Meal Expenses Allowable Limits

In accordance with the provisions of Circular 16-11-OMB, which supersedes Circular 12-14-OMB, the following limits for meal expenses per individual shall not be exceeded:

- Breakfasts       \$7.00
- Lunches           \$10.00
- Dinners           \$15.00

### Annual Maximum Travel Expenditure Amount

The Board shall:

1. Allot in its annual budget a maximum travel expenditure amount and annually review its policy to assure that it properly reflects the amount budgeted.
2. Vote to authorize each reimbursement; specifying the way in which it promotes the delivery of instruction or furthers the efficient operation of the school district, within the maximum annual amount.
3. Annually in the pre-budget year, establish by Board resolution, a maximum travel expenditure amount for the budget year, which the school district shall not exceed in that budget year. The Board resolution shall also include the maximum amount established for the pre-budget year and the amount spent to date.
4. Provide that the maximum school district travel expenditure amount shall include all travel in accordance with this policy supported by local and State funds.

### Documentation for Reimbursement of Expenses

In all cases, district employees and Board Members shall complete a voucher for any and all expenses being submitted for reimbursement, along with original, dated receipts for these expenses.

The Board directs the Interim Business Administrator/Board Secretary to review all expenses submitted for reimbursement by district employees and Board Members to ensure that they are reasonable and fully documented according to the provisions of this policy.

### Additional Detailed Accounting Requirements which Demonstrate Compliance

In order to demonstrate compliance with this policy, documentation of all reimbursed travel expenses shall be maintained on file. This record may include receipts, checks and vouchers submitted in connection with any reimbursement. The district shall maintain separate accounting for school district travel expenditures as necessary, to ensure compliance with the school district's maximum travel expenditure amount. This may include, but need not be limited to, a separate or offline accounting of such expenditures or expanding the school district's accounting system. The tracking system shall be sufficient to demonstrate compliance with the Board's policy and this section, and shall provide auditable information.

### Minimizing Travel Expenditures

Boards of Education and staff will take the following steps:

1. "Retreats" will be held at school district facilities, if available. A retreat is a meeting of school district employees and Board Members, held away from the normal work environment, at which organizational goals and objectives are discussed.
2. A school district shall not provide funds for car rentals, limousine services, and chauffeuring costs to or during the event, as well as costs for employee attendance for coordinating other attendee's accommodations at the travel event.
3. One-day trips that do not involve overnight lodging are not eligible for a subsistence payment or reimbursement except in limited circumstances authorized in Department of the Treasury guidelines.

4. Overnight travel is eligible for a subsistence payment or reimbursement as authorized in department of the Treasury guidelines, except as otherwise superseded by the following:
  - Per diem payment or reimbursement for lodging and meals will be actual reasonable costs, not to exceed the federal per diem rates as establish in the federal register for the current year;
  - Lodging expenses 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 the federal per diem rates. If the hotel at the site of the convention, conference, seminar or meeting is no longer available, lodging may be paid for similar accommodations at a rate not to exceed the hotel rate for the event;
  - Receipts are required for hotel expenses. Meal expenses under the federal per diem allowance limits do not require receipts;
  - In any case in which the total per diem reimbursement is greater than the federal per diem rate, except when the going rate for lodging at the site of the convention or meeting exceeds federal per diem rates, the costs will be considered to be excessive and shall not be paid by school district funds;
  - School districts shall patronize hotels and motels that offer special rates to government employees unless alternative lodging offers greater cost benefits; and,
  - Payment or reimbursement is approved for the full cost of an official convention meal that the employee or Board Members attends; when the meal is scheduled as an integral part of the convention or conference proceedings. If a meal is included in the registration fee, the allowance for the meal is not eligible for reimbursement.

Blanket or general pre-approval for travel is not authorized, and will not be permitted by the Board. Specifically, approval shall be itemized by event, event total cost, and number of employees and Board Members attending the event. However a Board may also approve, at any time prior to the event, travel for multiple months as long as the Board approval, as detailed in Board minutes, itemizes the approval by event, total cost, and number of employees and Board Members attending the event.

#### Exclusions Allowed by Law

Excluded from the requirements of prior Board approval is any travel caused by or subject to contractual provisions, other statutory requirements, or federal regulatory requirements. The Board will not exclude such travel from the subsistence requirements and the annual maximum travel expenditure amount.

#### Penalties

The Board by this policy informs its members and staff that the penalties for violating this policy based on State law include:

1. By law, 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 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.
2. A person who approves any travel in violation of the school district's policy or this section shall be required to reimburse the school district in an amount equal to three times the cost associated with attending the event.

3. An employee or member of the Board of Education who travels in violation of the school district's policy or this section shall be required to reimburse the school district in an amount equal to three times the cost associated with attending the event.

The Superintendent/Principal and Business Administrator/Board Secretary will develop regulations to implement this policy.

#### Legal References

- NJSA 18A:2-1 Power to effectuate action  
18A:4-23 Supervision of schools; enforcement of rules and 24 Determining efficiency of schools; report to state board  
18A:11-1 General mandatory powers and duties  
18A:12-4 Compensation of members  
18A:12-24 School Ethics Act and 24.1 Code of Ethics
- NJAC 6A:23B-1.1 et. seq. Travel and Related Expense Reimbursement (Non-Abbott Districts)  
6A:23A-5.9 Out of state and high cost travel
- P.L.. 2005, c.132 Appropriations Act  
P.L. 2007, c. 52 District accountability measures  
NJ Department of Treasury NJOMB Circular A-87  
Manual for the Evaluation of Local School Districts  
New Jersey Quality Single Accountability Continuum (NJQSAC)

#### Possible Cross References

3300, 3330, 3571, 4131/4131.1, 4233, 4231/4231.1, 4233, 9200, 9250, 9270

**Fairfield Board of Education Important  
Information - Travel Process Updated**

1. Each employee must submit an individual request.
2. Travel request must be submitted with sufficient time for Board approval.
3. All non-regular district business travel must utilize these forms/processes.  
(This includes: seminars, staff training, conventions and conferences.)
4. Registration requisitions can be entered in Edu-Met prior to Board approval, but it will not be processed until it is board approved.
5. Airfare will be prepaid after board approval through the district purchase order process whenever possible.
6. Hotel and food expenses will be reimbursed through Accounts Payable utilizing the **GSA** rates.
7. After the travel is complete, forward the "Travel Reimbursement form" form and "Travel Justification Summary Form" form to your Supervisor for approval.
8. Submit original receipts with the voucher and "Travel Justification Summary" form so reimbursement can be processed. (Keep copies for your records)
9. The "Travel Justification Summary" tab is required and reimbursement cannot be processed until that form is completed.
10. **Select Budget tab for instruction in how to complete the travel reimbursement forms.**

**Meals and Incidental Expense Breakdown can be determined by city/state via: [www.gsa.gov/mie](http://www.gsa.gov/mie)**

**TRAVEL  
MILEAGE COMMUTE DEDUCTION  
WORKSHEET**

**NAME:** \_\_\_\_\_

**TRAVEL LOCATION/WORKSHOP:** \_\_\_\_\_

**DATES TRAVELED:** \_\_\_\_\_

All school districts must adhere to state law, state code and NJ Department of Treasury Circulars as it pertains to travel. The NJ Department of Treasury issued on December 16, 2010, NJ Circular 11-05-OMB—Travel Regulations. Of particular attention is Section H---Travel by Personal Vehicle (Mileage Basis)

**Deduct Home to Work Commute Mileage**

The State of NJ has mandated through NJ Circular 11-05-OMB Section H-4 that all commutation expense must be deducted when calculating mileage allowance.

This worksheet is provided to school employees who plan to travel.

**WORKSHEET**

<b>HOME ADDRESS TO TRAVEL DESTINATION ADDRESS</b>	_____	<b>MILES</b>
<b>HOME ADDRESS TO FAIRFIELD TWP SCHOOL</b>	<b>(DEDUCT)</b> _____	<b>MILES</b>
<b>ONE WAY MILAGE TOTAL</b>	_____	<b>MILES</b>

You would then double the mileage traveled for round trips and enter that mileage on all forms for approval and reimbursement.

**Please maintain this worksheet on file with your travel information and forward with requisitions for review.**

Supporting Documentation

All employees are to **submit with this form a copy of the actual route traveled**, via a copy from one of the following websites:

- Map Quest
- Google Maps
- Yahoo Map

\_\_\_\_\_  
**Employee Signature**

## Fairfield Board of Education Travel Justification Summary

Employee Name:

Below is the narrative justification of how this trip benefited the pupils, teaching staff or administration of the school and school district as required by NJAC 6A:23A and by Fairfield Board of Education Policy

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Employee Signature

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Date



**REQUEST FOR OUT OF STATE TRAVEL**

DISTRICT NAME: Fairfield DATE SUBMITTED: \_\_\_\_\_

NAME OF EVENT: \_\_\_\_\_  
 LOCATION: \_\_\_\_\_

DATES: From \_\_\_\_\_ Through \_\_\_\_\_

	PARTICIPANTS' NAMES	TITLE
1.		
2.		
3.		
4.		
5.		

**FUNDING BREAKDOWN (Attach Details):**

Registration \$0.00 \_\_\_\_\_ Taxi \$0.00 \_\_\_\_\_  
 Transportation: Air Fare \$0.00 \_\_\_\_\_ Car Rental \$0.00 \_\_\_\_\_  
 Lodging \$0.00 \_\_\_\_\_ Meals \$0.00 \_\_\_\_\_  
 Other (Explain) \_\_\_\_\_ Total Per person Cost \_\_\_\_\_

Account Budgeted: \_\_\_\_\_ Total \$\$ Budgeted: \_\_\_\_\_

\*Professional Development Plan Goals/Objectives:  
 \_\_\_\_\_  
 \_\_\_\_\_

**JUSTIFICATION--Attendance at this event is critical to the operational and instructional needs of the District for the following reasons:**  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

ATTACH AGENDNITINERARY (incl. estimates for transportation, lodging, registration, etc.)

District Authorization

Chief School Administrator Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 District board of education approval date: \_\_\_\_\_

For DOE Use Only

Approved \_\_\_\_\_ Conditional Approval \_\_\_\_\_ Denied \_\_\_\_\_

Rationale:  
 \_\_\_\_\_  
 \_\_\_\_\_

Annette Castiglione, Director Office of Student Achievement and Fiscal Support

Signature \_\_\_\_\_ Date \_\_\_\_\_

\* Applies to district employees only.

**REQUEST FOR OUT OF STATE TRAVEL APPROVAL  
FOR MORE THAN 5 INDIVIDUALS  
OR AMOUNT GREATER THAN \$5,000**

Directions: Complete a form for each individual in the district requesting to attend an event requiring travel out-of-state. Incomplete forms and those without the required documentation and signatures will be returned to the district unsigned. 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:1 1-12; N.J.A.C. 6A:23A-5.8, 5.9 and New Jersey OMB **Circulars:** 06-14-OMB and 08-19-OMB.

**District Name:**

**Request Submission Date:**

**Name of Event:**

**Event Location:**

**District Contact Name:**

**Phone:**

**Fax:**

**JUSTIFICATION OF NEED**

Provide 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/Principal Signature:**

**Date:**

**District Board of Education approval date:**

Divider

Account Number

### **Account Numbers**

All account numbers will be provided by the Interim Business Administrator /Board Secretary or by his or her staff. Please feel free to contact the business office with any questions.

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**Divider**

**Sample RFP**

**Sample RFP**

**Fairfield Township Schools**

*Business Office  
375 Gouldtown-Woodruff Road  
Bridgeton, NJ 08302*

May 8, 2017

**RE: Project # RFP17-004  
Nursing Services**

To Whom It May Concern:

Sealed proposals will be received by the Fairfield Township Schools for a Nursing Services Consultant. Sealed proposals will be received at the office of the Fairfield Board of Education, located at 375 Gouldtown-Woodruff Road, Bridgeton, NJ 08302 at **10:00 a.m.** prevailing time on Tuesday, May 23, 2017.

We appreciate your interest in this project and look forward to your participation.

Sincerely,

William M. Gerson  
Interim Business Administrator/Board Secretary

**Divider**

**Sample RFP**

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**Attachment 2**  
**Sample RFP**

**Fairfield Township Schools**

*Business Office*  
*375 Gouldtown-Woodruff Road*  
*Bridgeton, NJ 08302*

May 8, 2017

**RE: Project #RFP17-004**  
**Nursing Services**

To Whom It May Concern:

Sealed proposals will be received by the Fairfield Township Schools for Nursing Services Consultant. Sealed proposals will be received at the office of the Fairfield Board of Education, located at 375 Gouldtown-Woodruff Road, Bridgeton, NJ 08302 at **10:00 a.m.** prevailing time on **Tuesday, May 23, 2017.**

We appreciate your interest in this project and look forward to your participation.

Sincerely,

William M. Gerson  
Interim Business Administrator/Board Secretary

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*FAIRFIELD BOARD OF EDUCATION*

*REQUEST FOR PROPOSAL  
(RFP)*

*NURSING SERVICES*  
**RFP#17-004**

**Tuesday, May 23, 2017  
10:00 AM**

William Gerson  
Interim Business Administrator/ Board Secretary

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**FAIRFIELD BOARD OF EDUCATION**

**375 Gouldtown-Woodruff Road**

*Bridgeton, NJ 08302*

**REQUEST FOR PROPOSAL  
(RFP)**

**TECHNICAL  
SPECIFICATIONS**

William Gerson  
Interim Business Administrator /Board Secretary

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**FAIRFIELD BOARD OF EDUCATION**  
**375 Gouldtown-Woodruff Road**  
*Bridgeton, NJ 08302*

**NURSING SERVICES**

**Project # RFP 17-004**

**A. PURPOSE**

The Fairfield Board of Education (District) is seeking competitive proposals from qualified agencies to provide nursing services to students attending Salem County Special Services.

**B. SCOPE OF SERVICE**

The selected agency shall provide services for students with disabilities whose Individual Educational Plan (IEPs) indicate the need for such services, and for whom physicians' recommendations have been received.

Services to be provided shall include, but shall not be limited to:

- One on one nurse - Students who require continuous care throughout the school day.
- Classroom nurse - One nurse shall be utilized for up to three students who do not require one on one services, but do require intermittent skilled nursing services (i.e. tube feedings, medication administration, respiratory treatments) during the course of the school day.
- Transport nurse - Assigned to students who require clinical supervision while being transported to and from school.
- The agency shall assign a liaison to coordinate the delivery of services.
- The agency shall provide supervision of the services provided to all students on a monthly basis at a minimum.
- The agency shall have English/Spanish bilingual nurses available.
- The agency shall maintain documentation on all services rendered. Documentation shall include: a log of services (dates, times, locations) along with descriptions of services provided to each student.

**C. QUALIFICATIONS OF RESPONDENTS**

Each respondent shall provide a brief description of the agency's design for providing the services requested in this RFP. The respondent shall have demonstrated experience working with school districts in New Jersey providing the type of services requested in this RFP.

**D. TERM OF CONTRACT**

The term of contract shall be for a period of one year pursuant to N.J.S.A. 18A:18A-42 with two one- year extension options at the discretion of the District.

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**E. COORDINATION OF ACTIVITIES**

All activities for this contract will be coordinated through the office of

Ms. Angela Best  
CST Coordinator  
856.853.1882 Ext. 8002  
[abest@Fairfield.k12.nj.us](mailto:abest@Fairfield.k12.nj.us)

**F. FEESCHEDULE-PAYMENT**

Submit a proposal fee schedule and a sample list of services, along with a complete description of the maximum price for each type of service proposed.

**G. PRESENTATION PACKAGE** -Submit with the RFP Response

The Fairfield Public School District seeks from all participating respondents' information that will assist the district in selecting the respondent who will provide the highest quality services at a fair and competitive price.

All respondents shall prepare a presentation package to be submitted with the RFP.

The Presentation Package shall include at a minimum the following:

**I. Management Criteria**

**A. Business Organization**

The respondent shall submit a full description of the business organization to include, but not be limited to:

- Name, address, phone, fax, website, e-mail address and other information of the professional firm or individual;
- An organizational chart noting the names of all principals and partners;
- Resumes of key staff members; and
- Other information concerning individuals of the professional firm that would assist the school district in the evaluation process.
- A brief description of the agency's design for providing the services requested.
- Include documentation on the type and frequency of supervision to be provided. This shall include the position(s) and qualifications of staff member(s) who will provide supervision.
- Identify the agency staff to serve as liaison for service delivery and a description of the staff's qualifications and experience.

**B. Qualifications: Relevant Experience**

Respondents shall submit documentation highlighting qualifications and experience they have that will assist the school district in the evaluation and selection process.

- The agency shall submit a copy of the license/certificate from the State of New Jersey for each staff member that will provide service to the District.
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## **II. Technical Criteria**

### Description of Services

- Documentation of agency's experience in providing nursing services to pediatric clients.
- A brief description of the agency's design for providing the services requested.

## **H. EVALUATION PROCESS: METHODOLOGY OF AWARDING CONTRACT**

All RFP responses are to be evaluated on the basis of whose response is the most advantageous to the district, price and other factors considered, and whose response will provide the highest quality of service at fair and competitive prices.

The Board of Education will use a one hundred (100) point system in evaluating all proposals. The criteria to be evaluated are identified below:

	<b>Category</b>	<b>Value Points</b>
I.	Management Criteria  A. Business Management B. Qualifications & experience of staff C. Responsiveness and completeness of the proposal.	30
II.	Technical Criteria  A. Documented experience in successfully providing nursing services for students with disabilities	55
III.	Cost Criteria  A. Fee Proposal	15

## **I. EVALUATION OF PROPOSALS -- Evaluation Committee**

All proposals will be evaluated in accordance with the Office of State Comptroller's publication

### Best Practices for Awarding Services Contracts

Section 4- (*The Need for an Evaluation Committee*), it has been determined that the evaluators:

- "... are sufficiently qualified to evaluate the strengths and weaknesses of the proposals submitted."
  - "... have the relevant experience necessary to evaluate the proposal;" and
  - "... are familiar with the need for the services to be performed in the request for proposals."
-

**J. AWARD OF CONTRACT**

It is the intention of the Board of Education to award the contract to the respondent whose response is the most advantageous to the board, price and other factors considered; and who will provide the highest quality service at fair and competitive prices.

At the discretion of the Board of Education, the top three firms/agencies may be asked to do a presentation to the Board's Finance Committee.

**FAIRFIELD TOWNSHIP BOARD OF EDUCATION**

*375 Gouldtown-Woodruff Road  
Bridgeton, NJ 08302*

**REQUEST FOR PROPOSAL**

**GENERAL  
SPECIFICATIONS**

William M. Gerson

Interim Business Administrator/Board Secretary

**K. AFFIRMATIVE ACTION REQUIREMENTS**

Each respondent shall submit to the public agency, after notification of award but prior to execution of a goods and services contract, one of the following three documents:

- i. Appropriate evidence that the respondent is operating under an existing federally approved or sanctioned affirmative action program; or
- ii. A certificate of employee information report approval issued in accordance with N.J.A.C. 17:27-4; or
- iii. An employee information report (Form AA302) provided by the Division and distributed to the public agency to be completed by the contractor, in accordance with N.J.A.C.17:27-4.

Please note: A completed and signed Affirmative Action Questionnaire is required with submission of proposal. However, the Board will accept in lieu of the Questionnaire, Affirmative Action Evidence stapled to the Affirmative Action Questionnaire form.

"If awarded a contract your company/firm will be required to comply with the requirements of N.J.S.A. 10:5-31 et. seq. and N.J.A.C. 17:27 et. seq.

**L. AUTHORIZATION TO WORK - PURCHASE ORDER REQUIRED**

No service shall be rendered unless the successful respondent receives an approved purchase order authorizing the respondent to render the service.

**M. BUSINESS REGISTRATION CERTIFICATE (N.J.S.A. 52:32-44)**

Pursuant to N.J.S.A. 52:32-44 as amended by P.L. 2004 - Chapter 57, all respondents shall submit with their proposal package a copy of their "New Jersey Business Registration Certificate" as issued by the Department of Treasury of the State of New Jersey. Failure to provide the New Jersey Business Registration Certification with the proposal package, or prior to the award of contract, will be cause for the rejection of the entire proposal.

**Goods and Services Contracts**

N.J.S.A. 52:32-44 imposes the following requirements on contractors and all subcontractors that **knowingly** provide goods or perform services for a contractor fulfilling this contract: **1)** The contractor shall provide written notice to its subcontractors to submit proof of business registration to the contractor; **2)** prior to receipt of final payment from a contracting agency, a contractor must submit to the contracting agency an accurate list of all subcontractors or attest that none was used;

**3)** during the term of this contract, the contractor and its affiliates shall collect, remit, and notify all subcontractors and their affiliates that they must collect and remit to the Director of the New Jersey Division of Taxation, the use tax due pursuant to the Sales and Use Tax Act, (N.J.S.A. 54:32B-1 et seq.) on all sales of tangible personal property delivered into this State.

A contractor, subcontractor or supplier who fails to provide proof of business registration or provides false business registration information shall be liable to a penalty of \$25 for each day of violation, not to exceed \$50,000 for each business registration not properly provided or maintained under a contract with a contracting agency. Information on the law and its requirements is available by calling (609) 292-9292.

**N. CONTRACTS**

Upon notification of award of contract by the Fairfield Township Board of Education, the successful respondent shall sign and execute a formal contract agreement with the Board of Education.



The successful respondent shall sign and execute said contract and return it together with documents required by the district such as but not limited to:

- Professional Liability Certificate;
- Criminal History Background evidence;
- Other required documents as may be outlined in the proposal specifications.

Within ten (10) days of receipt of notification of award of contract, the executed contracts and related documents must be returned to:

Mr. William M. Gerson  
Interim Business Administrator/Board Secretary

#### **O. DOCUMENTS. MISSING /ILLEGIBLE**

The respondent shall familiarize himself with all forms\* provided by the Board that are to be returned with the proposal. If there are any forms either missing or illegible, it is the responsibility of the respondent to contact the Purchasing Agent at (856.453.1882 ext. 8017) for duplicate copies of the forms. This must be done before the proposal submission. The Board accepts no responsibility for duplicate forms that were not received by the respondent in time for the respondent to submit with his proposal.

**All documents returned to the Board shall be signed with an original signature in ink (blue). Failure to sign and return all required documents with the RFP package may be cause for disqualification and for the proposal to be rejected pursuant to N.J.S.A. 18A:18A-2(y) (non- responsive). The Board will not accept facsimile or rubber stamp signatures.**

#### **P. DOCUMENT SIGNATURES -ORIGINAL: BLUEINK**

All documents returned to the Board shall be signed with an original signature in ink (blue). Failure to sign and return all required documents with the bid package may be cause for disqualification and for the bid to be rejected pursuant to N.J.S.A. 18A:18A-2(y) (non-responsive). The Board will not accept facsimile or rubber stamp signatures.

\*Forms provided by the Board of Education that must be returned with proposal.

- Proposal Form
- Affirmative Action Questionnaire or Affirmative Action Evidence
- Non Collusion Affidavit
- Stockholders' Disclosure/ Ownership Declaration
- Contractor/Vendor Questionnaire and Certification
- Acknowledgement of Addenda
- Chapter 271 - Political Contribution Disclosure Form
- Disclosure of Activities in Iran Form

\*Please check your bid package for these forms!

#### **Q. EVALUATION OF CRITERIA**

The school district intends to evaluate all proposals on the basis of the responses that are most advantageous to the district, price and other factors considered. Included in the evaluation process, but not limited to be the following criteria:

- Experience and ability to perform services;
- Qualifications and references;
- Organization; staffing;
- Cost proposal;
- Other factors demonstrated in the respondent's presentation package that may be in the best interests of the school district.

**R. FALSE MATERIAL REPRESENTATION - N.T.S.A.2C:21-34-97(b)**

A person commits a crime if the person knowingly makes a material representation that is false in connection with the negotiation, award or performance of a government contract. If the contract amount is for \$25,000.00 or above, the offender is guilty of a crime of the second degree. If the contract amount exceeds \$2,500.00, but is less than \$25,000.00, the offender is guilty of a crime of the third degree. If the contract amount is for \$2,500.00 or less, the offender is guilty of a crime of the fourth degree.

**S. INCIDENTAL EXPENSES**

All incidental expenses related to the services provided are the responsibility of professional service provider. The school district will not reimburse any provider for any incidental expenses related to the contract.

*Travel*- The proposal costs submitted by respondents shall include any or all costs pertaining to travel to and from any site where the services are to be performed. The Fairfield Public School District will not pay any costs for travel. Travel time is not to be charged on any hourly or service rate. Travel time to and from the site of service is to be borne by the respondent.

**T. INSURANCE: PROFESSIONAL LIABILITY-CERTIFICATE REQUIRED**

X Required                      D Not Required

The successful respondent to whom the contract is awarded shall provide to the Board of Education with contract documents a Professional Liability Insurance Certificate with the following limits:

\$1,000,000 Each Incident; Occurrence; Wrongful Act  
\$3,000,000 Aggregate

The insurance certificate name as to the certificate holder shall be as follows:

The Fairfield Board of Education  
c/o The Business Office  
375 Gouldtown-Woodruff Road  
Bridgeton, NJ 08302

The insurance shall remain in full force during the term of contract.

**U. INTERPRETATIONS AND ADDENDA**

No interpretation of the meaning of the specifications will be made to any Respondent orally. Every request for such interpretations should be made in writing to the Purchasing Agent and must be received at least ten (10) days prior to the date fixed for the opening of proposals to be given consideration. Any and all interpretations and any supplemental instructions will be distributed in the form of written addenda to the specifications. The addenda will be provided in accordance with N.J.S.A. 18A:18A-21(c) to the respondents by certified mail or certified fax no later than seven (7) days Saturdays, Sundays, and holidays excepted, prior to the date for acceptance of proposals. All addenda so issued shall become part of the contract document.

**V. POLITICAL CONTRIBUTION DISCLOSURE STATEMENT - PAYTO PLAY**

A business entity as defined by law is advised of its responsibility to file an annual disclosure statement on political contributions with the **New Jersey Election Law Enforcement Commission** pursuant to N.J.S.A.

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19:44A-20.13 (P.L. 2005 Chapter 271 section 3) if the business entity receives contracts in excess of \$50,000 from Public entities in a calendar year. It is the business entity's responsibility to determine if filing is necessary. Additional information on this requirement is available from the New Jersey Election Law Enforcement commission at 1-888-313-3532 or at [www.elec.nj.us](http://www.elec.nj.us).

Pursuant to N.J.A.C. 6A:23A-6.3 (a1-4) please note the following:

Award of Contract -- Reportable Contributions -- N.J.A.C. 6A:23A-6.3 (a1)

"No board of education will vote upon or award any contract in the amount of \$17,500 or greater to any business entity which has made a contribution reportable by the recipient under P.L. 1973, c83 (codified at N.J.S.A. 19:44A-1 et. seq.) to a member of the board of education during the preceding one year period."

Contributions During Term of Contract - Prohibited -- N.J.A.C. 6A:23A-6.3 (a2, 3) "Contributions reportable by the recipient under P.L. 1973, c83 (codified at N.J.S.A. 19:44A-1 et. seq.) to any member of the school board from any business entity doing business with the school district are prohibited during the term of the contract."

When a business entity referred in 4.1(e) is a natural person, contribution by that person's spouse or child that resides therewith, shall be deemed to be a contribution by the business entity. When a business entity is other than a natural person, a contribution by any person or other business entity having an interest therein shall be deemed to be a contribution by the business entity."

Chapter 271 Political Contribution Disclosure Form -Required -- N.J.A.C. 6A:23A-6.3 (a4)

All bidders shall submit with their bid package a completed and signed Chapter 271 Political Contribution Disclosure Form. The Chapter 271 form will be reviewed by the district to determine whether the vendor is in compliance with the aforementioned N.J.A.C. 6A:23A-6.3 (a2) Award of Contract.

**W. PRE-PROPOSAL MEETING**

**D Applicable      X Not Applicable**

A pre-proposal meeting has been scheduled as follows:

10:00 a.m. \_\_\_\_\_ in the Board  
of Education Conference Room  
375 Gouldtown-Woodruff Road  
Bridgeton, NJ 08302

All potential respondents are encouraged to attend this very important meeting.

**X. SUBCONTRACTING: ASSIGNMENT OF CONTRACT**

Contractors services providers and all vendors with whom the Board of Education has an executed contract may not subcontract any part of any work done or consign any contract for goods or materials for the Board without first receiving written permission from the Purchasing Agent.

**Y. SUBMISSION DEADLINE**

The deadline to submit all RFP Packages is:

**Tuesday, May 23, 2017  
10:00 AM**

Submissions received after the date and time noted above shall not be considered.

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**Z. SUBMISSION OF RFP PACKAGE -(Original and two (2) copies**

All RFP Proposal Packages including the Letter of Transmittal and the Presentation Package are to be in a **sealed envelope** bearing the **title of the proposal and number** of the proposal in front and are to be delivered to:

Mr. William M. Gerson  
Interim Business Administrator/Board Secretary  
Fairfield Township Board of Education  
375 Gouldtown-Woodruff Road  
Bridgeton, NJ 08302

Respondents are to include:

- One original RFP Package with original signature
- Two (2) copies of the RFP Package

**AA. TERMINATION OF CONTRACT**

If the Board determines that the contractor has failed to comply with the terms and conditions of the **bid** and/or proposal upon which the issuance of the contract is based or that the contractor has failed to perform said service, duties and or responsibilities in a timely, proper, professional and/or efficient manner, then the Board shall have the authority to terminate the contract upon written notice setting forth the reason for termination and effective date of termination.

Termination by the Board of the contract does not absolve the contractor from potential liability for damages caused the District by the contractor's breach of this agreement. The Board may withhold payment due the contractor and apply same towards damages once established. The Board will act diligently in accordance with governing statutes to mitigate damages. Damages may include the additional cost of procuring said services or goods from other sources.

The contractor further agrees to indemnify and hold the District harmless from any liability to subcontractors or suppliers concerning work performed or goods provided arising out of the lawful termination of this agreement.

**BB. WITHDRAWAL OF PROPOSALS**

Before the Proposal Due Date

The Purchasing Agent may consider a written request from a respondent to withdraw a proposal if the written request is received by the Purchasing Agent before the proposal due date. Any respondent who has been granted permission by the Purchasing Agent to have his/her proposal withdrawn cannot re-submit a proposal for the same project.

After the Proposal Due Date

The Board of Education may consider a written request from a respondent to withdraw a proposal if the written request is received by the Purchasing Agent within five (5) business days after the proposal opening. A request to withdraw a proposal after the specified number of days will not be honored.

The respondent who wishes to withdraw a proposal must provide a certification supported by written factual evidence that an error or omission was made by the respondent and that the error or omission was a substantial computational error or an unintentional omission or both.

The request to withdraw a proposal after the proposal due date may be reviewed by the Purchasing Agent, the interested administrators; and/or the Board Attorney and a recommendation will be made to the Board of Education.

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The Board of Education will be the final determining authority in permitting the proposal to be withdrawn .

**CC. QUESTIONS**

All questions related to this RFP shall be submitted in writing via email or fax to:

Mr. William M. Gerson  
Interim Business Administrator/Board Secretary  
Fairfield Township Board of Education  
375 Gouldtown-Woodruff Road  
Bridgeton, NJ 08302  
856-453-7189

Questions should be submitted by **12:00 noon Thursday, May 11, 2017.**

# **Fairfield Board of Education**

## **ETHICS IN PURCHASING**

### ***Statement to Vendors***

#### **School District Responsibility**

##### **Recommendation of Purchases**

It is the desire of the Fairfield Board of Education to have all Board employees and officials practice exemplary ethical behavior in the procurement of goods, materials, supplies, and services.

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

##### **Solicitation /Receipt of Gifts -Prohibited**

School district officials and employees are prohibited from soliciting and receiving funds, gifts, materials, goods, services, favors, and any other items of value from vendors doing business with the Fairfield Board of Education or anyone proposing to do business with the Fairfield School District.

#### **Vendor Responsibility**

##### **Offer of Gifts. Gratuities -- Prohibited**

Any vendor doing business or proposing to do business with the Fairfield Public School District, 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 Fairfield Township School District or to any member of the official's or employee's immediate family.

##### **Vendor Influence -- Prohibited**

No vendor shall cause to influence or attempt to cause to influence, any official or employee of the Fairfield Public School District, in any manner which might tend to impair the objectivity or independence of judgment of said official or employee.

#### **Vendor Certification**

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

William M. Gerson  
Interim Business Administrator/Board Secretary

**FAIRFIELD TOWNSHIP BOARD OF EDUCATION**

375 Gouldtown-Woodruff Road  
Bridgeton, NJ 08302

**William M. Gerson**

BOARD SECRETARY  
INTERIM SCHOOL BUSINESS ADMINISTRATOR

TO: All Vendors

**UNAUTHORIZED ORDERS**

**Authorized Purchases**

The Fairfield Board of Education only recognizes purchases made through the approved purchase order process. All purchases require a:

*Written Purchase Order* with authorized signatures and a Purchase Order Number.

**Unauthorized Purchases**

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

**Vendors' Responsibility**

- **Do NOT Honor Requests!**  
Vendors are not to honor or accept any requests for goods or services unless the vendor receives a written purchase order with authorized signatures and a purchase order number.
- **Contact the Business Office!**  
Please alert Mr. William Gerson, Purchasing Agent at 856.453.1882, ext. 8017 if any Board employee attempts to place an order without an authorized purchase order.
- **You will NOT Get Paid!**  
The Fairfield Township Board of Education will not be held responsible for any unauthorized orders or purchases.

**Authorized Signatures**

The Fairfield Board of Education will only recognize purchase orders signed by:

**William M. Gerson**  
**Interim Business Administrator/Board Secretary**

Divider

Mission Statement

Vision Statement



# FAIRFIELD TOWNSHIP SCHOOL

## Mission Statement

**The mission of the Fairfield Township School District is to ensure all students an equal opportunity to participate in a diverse instructional program that promotes self-worth, citizenship and the achievement of high standards. In a modern and safe learning environment, students will become successful and contributing members of a democratic society.**

**Divider**

**Wellness & Nutrition**

**Policy**

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The Board of Education believes that children need access to healthful foods and opportunities to be physically active in order to grow, learn, and thrive, and that good health fosters student attendance and education.

Therefore, the Board of Education is committed to providing school environments that promote and protect children's health, well-being, and ability to learn by supporting healthy eating and physical activity, and will ensure that:

- A. All students will have opportunities, support, and encouragement to be physically active on a regular basis.
- B. Foods and beverages sold or served at school will meet the nutrition recommendations of the *U.S. Dietary Guidelines for Americans, the Healthy, Hunger-Free Kids Act of 2010* and the USDA nutrition standards for National School Lunch, School Breakfast and/or After School Snack Programs.
- C. Qualified child nutrition professionals will provide students with access to a variety of affordable, nutritious, and appealing foods that meet the health and nutrition needs of students; will accommodate the religious, ethnic, and cultural diversity of the student body in meal planning; and will provide clean, safe, and pleasant settings and adequate time for students to eat.
- D. Meal periods shall be scheduled at appropriate times (Lunches will be served between 10:00 AM and 2 PM).
- E. All food preparation areas shall have had regular health inspections and received satisfactory approvals.
- F. To the maximum extent practicable, all schools in the district will participate in available federal school meal programs (including the School Breakfast Program, National School Lunch Program including- after-school snacks, Summer Food Service Program, Fruit and Vegetable Snack Program, and Child and Adult Care Food Program).
- G. Schools will provide nutrition education and physical education to foster lifelong habits of healthy eating and physical activity, and will establish linkages between health education and school meal programs, and with related community services.
- H. The Board will engage students, parents, teachers, food service professionals, health professionals, and other interested community members in developing, implementing, monitoring, and reviewing district-wide nutrition and physical activity policies.

### Goals for the Promotion for Nutrition Within the District

The following activities will be coordinated within district:

- Age-appropriate materials will be posted where food and beverages are served to students encouraging the value of good nutrition;
- During the school year, the lunch program will have promotional days where at least one (1) new nutritional alternative menu item will be featured as part of the menu pattern meal component;
- Staff members will promote this nutritional alternative during meals with appropriate hand-outs regarding any nutritional menu item alternative(s);
- The Superintendent/Principal/designee will encourage serving food products that meet the nutritional standards of the Healthy, Hunger-Free Kids Act of 2010 when used as an incentive or reward for student accomplishments, club or activity within the school;
- Designated staff members will coordinate obtaining student input on menu planning that will include taste testing of new nutritional food, satisfaction surveys, to promote nutrition awareness;
- Food service staff will place the healthier food items in the service line where students are more likely to choose them;
- Parents/guardians will be provided the nutritional standards of the the Healthy, Hunger-Free Kids Act of 2010;
- Parents/guardians will be encouraged to pack lunches and snacks that meet the nutritional standards as specified in the Healthy, Hunger-Free Kids Act of 2010;

The Superintendent/Principal/designee shall develop procedures and regulations process for measuring the effectiveness for the implementation of this policy. He/she shall also designate personnel with the responsibility for ensuring the school is complying with the policy. In addition, the Superintendent /Principal of Schools shall designate a district administrator to oversee and ensure that the district complies with the provisions of this policy and that the policy is implemented correctly for each are beverages are offered, including vending machines and the school store(s), if applicable.

### Nutritional Education

The Superintendent/Principal/designee will ensure that there will be at least one presentation per school year promoting good nutrition and nutrition education. These presentations may be provided through classroom visits from school staff members trained in nutrition, school-wide or group assembly programs, during health/physical education classes during the school year, or any other presentation manner. This requirement may be provided as part of nutrition education provided to students as part of the district's curriculum.

The Superintendent/Principal/designee will post the nutritional guidelines of the Healthy, Hunger-Free Kids Act of 2010 where food and beverages are served.

The school lunch menu will include nutritional information, activities, recipes, and/or any other information that encourages the selection of healthy food items.

### Physical Activity

In the elementary grades of the district:

- All students shall receive health/physical education under the supervision of a properly certified teaching staff member;
- The Superintendent/Principal/designee will ensure there is age-appropriate equipment and supplies available during recess time for students to participate in physical activities;
- Students will be encouraged by school staff members supervising student recess time to participate in some type of physical activity, which may include, but not be limited to: walking; playing games that require physical activity, such as kick ball, volleyball, baseball, basketball, etc.; rope jumping; and/or using playground equipment;
- The Superintendent/Principal of Schools will encourage classroom teachers to incorporate brief, physical activity breaks into the school day to establish an environment that promotes regular physical activity throughout the school day. He/she shall also coordinate special events highlighting physical activity, that may include field days, walk-a-thons, and activity tournaments or competitions;
- The Superintendent/Principal/designee may involve parents, community members, and students in the planning of these events

In the middle school grades of the district:

- All students shall receive health/physical education under the supervision of a properly certified teaching staff member;
- Middle school students may be offered opportunities to participate in after-school intramural and/or interscholastic team activities coordinated and under the supervision of school staff members;
- After-school activities and clubs where physical activity for students is included as a key component to the activity's or club's purpose may be provided by the Board. This may include, but not be limited to, gardening clubs, walking clubs, and exercise classes.

### Other School-Based Activities

The district will establish a Wellness Committee comprised of the Superintendent/Principal/designee, a health/physical education teacher, the school nurse, at least two (2) parents/guardians, at least two (2) students, and at least one (1) food service staff member.

The Superintendent/Principal/designee will coordinate information being disseminated to students and parents promoting the school lunch program, nutrition, and nutrition education.

The school district will celebrate a School Wellness Week, as determined by the Superintendent/Principal/designee and will have special activities throughout the week to promote nutrition and physical activity. These special activities will be planned and coordinated by the Wellness Committee.

The Superintendent/Principal/designee will encourage fund-raising activities that promote physical activity such as walk-a-thons, teacher-student activity competitions, family activity nights, and school dances.

#### Annual Progress Report

The goals for nutrition promotion, nutrition education, physical activity, and other school-based activities that promote student wellness shall be evaluated annually by the Superintendent/Principal/designee and Wellness Committee in an Annual School Progress Report provided to the Superintendent/Principal/designee by June 30<sup>th</sup> of each school year.

The Annual Progress Report shall present the extent to which the district is in compliance with this policy, any recommended changes to this policy, and an action plan for the following school year to achieve the school's annual goals and objectives.

#### Guidelines for All Foods and Beverages

The Board of Education requires that the district to complies with the federal school meal nutrition standards and the smart snacks in accordance with the requirements specified in the Healthy, Hunger-Free Kids Act of 2010. The nutritional standards shall apply to all foods and beverages sold in each school in the district as part of the menu pattern meal, a la carte, in school stores, snack bars, or vending machines. The food requirements for any food sold in schools must meet a range of calorie and nutrient requirements as outlined in the Healthy, Hunger-Free Kids Act of 2010

The school district will comply with the Healthy, Hunger-Free Kids Act of 2010 beverage requirements and beverage portion requirements for elementary and middle school students. Potable water shall be made available to children at no charge in the place where breakfast, lunch, and afterschool snacks are served during meal service.

On-campus fundraisers involving food or beverage items must meet the Smart Snack standards of the Healthy, Hunger-Free Kids Act of 2010. Theses nutrition standards do not apply to non-school hours, weekends, and off-campus fundraising events.

The Superintendent/Principal of Schools shall be responsible to providing support for staff members so they have the skills and knowledge to implement the provisions of this policy.

The Board of Education will support the implementation of nutrition education throughout the school day and during after school programs, in order to promote a consistent message to parents/guardians and students.

#### Healthy Snack Guidelines

The following additional nutrient requirements shall also apply:

1. Calorie Limits – Snack Items  $\leq$  200 calories; Entrée Items  $\leq$  350 calories
2. Sodium Limits - Snack Items  $\leq$  230 mg.\*; Entrée Items  $\leq$  480 mg.
3. Fat Limits - Snack Items  $\leq$  35% of calories; Entrée Items  $\leq$  10% of calories;  
Trans fat: zero grams
4. Sugar Limit -  $\leq$  35% of weight from total sugars in foods

\* On July 1, 2016, snack items must contain  $\leq$  200 mg. sodium per item.

Accompaniments such as cream cheese, salad dressing and butter must be included in the nutrient profile as part of the food item sold. This helps control the amount of calories, fat, sugar and sodium added to foods

This policy does not apply to medically authorized special needs diets pursuant to 7 CFR Part 210, school nurses using Foods of Minimal Nutritional Value (FMNV) during the course of providing health care to individual students or special needs students whose Individualized Education Plan (IEP) indicates their use for behavior modification.

Adequate time shall be allowed for student meal service and consumption. Schools shall provide a pleasant dining environment. The Board of Education recommends that physical education or recess be scheduled before lunch whenever possible.

#### Notification

At a minimum, a copy of this policy shall be posted in the cafeteria(s), school store(s) and provided to the parent group(s) of the school district.

Parents/guardians shall be provided information supporting the provisions of this policy and promoting healthy choice awareness.

All staff members shall be provided with a copy of this policy annually or following any revision to it.

#### Legal References

NJSA 18A:11-1 General mandatory powers and duties  
18A:18A-4.1 f.,h. Use of competitive contracting in lieu of public bidding; boards of education  
18A:18A-6 Standards for purchase of fresh milk; penalties; rules and regulations 18A:33-3 through -5 Cafeterias for pupils  
18A:33-9 through -14 Findings, declarations relative to school breakfast programs 18A:54-20 Powers of board (county vocational schools)  
18A:58-7.1 through -7.2 School lunch program

NJAC 2:36-1.1 et seq. Child Nutrition Programs  
6A:16-5.1(b) School safety plans  
6A:23-2.6 Supplies and equipment 6A:32-12.1 Reporting requirements  
6A:32--14.1 Review of mandated programs and services  
6A:30-1.1 et seq. Evaluation of the Performance of School Districts

#### Healthy, Hunger-Free Kids Act of 2010

Sec. 204 at the Federal Child Nutrition and WIC Reauthorization Act of 2004 (P.L. 108- 265)  
42 U.S.C. 1751 et seq. Richard B. Russell National School Lunch Act 42 U.S.C. 1771 et seq. Child Nutrition Act of 1966  
7 C.F.R. Part 210 Medically authorized special needs diets 7 C.F.R. Part 210.10 Foods of minimum nutritional value Manual for the Evaluation of Local School Districts  
New Jersey Quality Single Accountability Continuum (NJQSAC)

#### Possible Cross References

1200, 1220, 3000/3010, 3450, 3510, 3542, 3542.31, 3542.44, 4222, 5131, 9123, 9124

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Divider

Artemis Records Retention and  
Disposal Management System

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The **Artemis Records Retention and Disposal Management System** is the State of New Jersey's electronic records retention and disposal system. In order to shred government records, you must submit a request through this system and obtain approval from the State. The State publishes a retention schedule for each Agency type (*an Agency is a class of records, i.e.: Administration, Financial, Student, etc.*) we are required to retain. This retention schedule is available online through the Artemis system. As you will notice, not all documents have the same retention requirements and in fact, some documents must be kept forever and may not be destroyed.

To begin, the district has already registered you into the system and you will receive your **log-on information under separate cover**. Do not share your log-in information with other individuals.

Log onto the website ***with Internet Explorer only*** at:

**[onlineservices.darm.state.nj.us/Artemis/login.aspx](http://onlineservices.darm.state.nj.us/Artemis/login.aspx)**

***(Other web browsers won't work)***

There are several roles in the system who must approve the disposal prior to the final submission to the state. For the most part, many of you will be assigned the role of **Multi Agency Records Disposal User**. This designation allows you to request a record's disposal and to approve at the first level, disposal of a record. Multi Agency Records Disposal Users have access to all Agency Records kept by the district.

The request then goes to a district Records Manager or Administrator for approval. This will be the Principal for school level documents, Superintendent/Principal, or Interim Business Administrator/Board Secretary for district level documents. In some cases, approval from our auditor will also be required. The Auditor tab will have an "X" in it to indicate Auditor Approval **NOT** Needed. Once all local approvals have been obtained, the request goes to the State for final approval.

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While there are step by step instructions attached to this memo, we recommend that each user listen to the training sessions available through the Artemis System.

Once you sign on to Artemis, click the **Training Video tab** in the upper right hand corner of the screen.

**Video #4** is a tape of an on line training session which covers most of what you will need. It does take about 1hour and 40 minutes to complete.

**Video #1** also explains about the signature process (41 minutes).

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# Fairfield Township Board of Education

## Artemis Records Retention System

### General instructions

*You will be given your PIN, log - On ID and Password separately.*

Log onto the website *with Internet Explorer only* at:

[onlineservices.darm.state.nj.us/Artemis/login.aspx](http://onlineservices.darm.state.nj.us/Artemis/login.aspx). (***Other web browsers won't work***)

You will need to enter your user name and password.

Then click the login box.

This will bring you to the Artemis Home Page.

#### **Accessing Training Videos**

In the upper right hand corner, click "Training Video."

Select the training videos you wish to see.

Once trained, you may begin to process records Destruction Requests.

#### **Retention Schedules**

From the home screen.

Click Search Records Retention Schedule

Click Org Type Board of Education

Click Search

Click Agency Details

Record document numbers

## **Requesting Record Destruction**

Click **Create Disposition Request**

**Agency Type** from the dropdown box, select **Admin, Student, etc.**

**Schedule #** click dropdown box & select *{If you click the printer icon and allow the retention schedule for the Agency will appear.}*

**Your Name** should appear as a default setting. **Requester Title** optional.

**Records Custodian**, select from dropdown box.

Check only boxes which apply for Microfilm, Digital Image, or Damaged Document Certificate

**Location, RIM** (Your own record number) & **Comment** are optional.

**A REDX in a box for an approver means that the approval is not needed. (AUDITOR)**

**Sign Electronically - Click yes**

***The second question cannot be completed until a record is entered.***

### **Disposition Request Details.**

You may record the document numbers you wish to destroy or select from a dropdown box by clicking the **blue question mark in the circle**.

This populates the title of the document and retention schedule.

Enter dates of the documents

If a date appears in the "**Dispose After**" box, it is too soon to dispose of this document. Click the blue circle with the "I" for the retention policy for this document.

Clicking the green "c" in the circle allows you to add a comment i.e.: "document saved on microfilm.}}

Enter requester title

**Medium Type** select from the dropdown box.

**Volume** - select from the dropdown box (click the blue question mark for a calculator box. Select the number and type containers.)

**Click OK** - This will populate the volume field.

**Click- SAVE.**

**A green statement "Document Saved " or a red error message will appear at the top of the page.**

This also generates a **Request Number** above the green Document Saved message.

To add another document click **Add Row or Add Multiple Rows** for several documents.

Select Documents & click OK

*Repeat steps above for dates, volume, etc.*

**Note:** *If the retention schedule is less than 10 years no microfilming required. If the retention schedule is greater than 10 years; microfilming required.*

**Optional Comment box** ("Documents have been microfilmed").

To delete a document from the request click the **RED X**.

**Recommendation:** click - *SAVE after each document added*

You should get a green statement at the top of the page "**Document Saved Successfully**"<sup>1</sup>

**Click -Print**, at lower right corner of screen to print a hard copy of the request.

Click on Note box to scan Imaging Certification, etc.

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*To Complete click eSign.*

*A drop down box appears.*

**Enter your PIN # & Click Authenticate**

Click **forward to** and select an approver (Superintendent/Principal for student records, HR for employee related documents and Interim Business Administrator/Board Secretary for all others}.

Click **e Sign and Reroute**.

*You get a message "**Authenticating, Please Wait**" (this may take a long time)*

Once Authenticated, an hour glass should appear in the approver box. This means approval pending

(An email is sent by the system to the approver to advise the approver that a request needs approval.)

**Click History** to view approval trail.

Once all signatures received, the requester and the approver receive an e-mail from Artemis stating "Ready to Submit".

Log onto Artemis

**Click ID** enter your ID

Search Agency for your document. It will read "**Ready to submit**".

Click on the document.

A screen will appear with a "SUBMIT" button.

**Click Submit**

A green message will appear "**Disposition Request Submitted Successfully**"

Your request is now at Artemis for review and approval.

Do nothing more with this request until you receive an approval from Artemis.

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**Final Steps**

Once submitted please check Artemis daily until approved.

Go to Home Screen

Check the **In Box** for **Disposition Requests Authorized**.

If you see your request listed click on it.

It will list **Authorized** in green in the "**Status**" box.

There is a PRINT button, click PRINT.

Save the screen shot for record destruction documentation.

**Please forward a copy of the State Approval to the Interim Business**

**Administrator/Board Secretary for the records retention file.**

**DO NOT schedule shredding until we have received the final State Approval.**