

Purchasing

Business & Auxiliary Services Training – Fall 2023

Contracts

Kurt Prusse

Contracts Make Purchasing Easier



- Your jobs are **busy!**
 - Between juggling multiple duties and projects; communicating with teachers, volunteers, students, parents, and other administrators; and then on top of that you get to do purchasing!
- How can you **simplify the process** of getting the goods and services you need to do your job?

What Is a Contract?



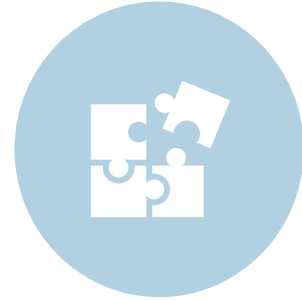
- What is a **contract**?
 - A contract is a **binding agreement between parties**, such as businesses or two or more people. It defines the obligations of each party to the other.
 - Contracts provide a **legal record of an agreement** between two or more parties – as to their understanding of their obligations and expectations.

5 Essential Elements of Contracts



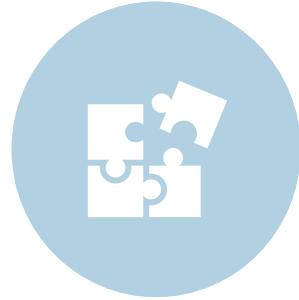
- 5 Essential Elements of a Contract
 - Offer
 - Acceptance
 - Consideration
 - Intention
 - Capacity

5 Essential Elements of Contracts



1. **Offer:** A proposal to enter into a contract. The offer must be clear and certain, and it must be made with the intention of creating a legally binding agreement
2. **Acceptance:** An agreement to the terms of an offer. The acceptance must be unequivocal and made with the intention of creating a legally binding agreement.
3. **Consideration:** Something of value that is exchanged between the parties to a contract. Each party must receive something of value in order to be bound by the contract.

5 Essential Elements of Contracts



4. **Capacity:** The parties to a contract must have the legal ability to enter into the agreement. This means that they must be of legal age and sound mind, and they must not be under any legal disability that would prevent them from understanding the terms of the contract.
5. **Legality:** The subject matter of a contract must be legal.

How to Use Contracts?



- There are 3 types of contracts available to use
 1. District Contracts
 2. Multi-School-District Cooperative Contracts (EdPAC)
 3. State of Utah Contracts

District Contracts



- Designed specifically for use in the **Jordan School District**
 - Central Warehouse, Child Nutrition, Custodial, Facility Services, Teaching & Learning, Special Education, and Information Systems
 - **73** Jordan School District specific contracts

District Contracts on the JSD Purchasing Website

<https://purchasing.jordandistrict.org>



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Contracts

- [District Contracts](#)
- [Cooperative Contracts \(Multi-District\)](#)
- [State Contracts](#)

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JORDAN 
SCHOOL DISTRICT

District Contracts on the JSD Purchasing Website

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District Contracts

Frequently Used District Contracts

Contract Name	Contract Number	Link/Comments
Library Books and Services	16DS09 & JF18-01	 Library Books and Services
HP & Canon OEM Ink, Toner, and Supplies	23TH04-5	 Ink, Toner, and Supplies Vendor List

All Other District Contracts

Contract Name	Contract # / Summary	Expiration Date
95 Percent Group Intervention Program	 SS20BV23 (S)	03/31/2025
Asbestos Abatement Services	 18DB08P5 (S)	03/27/2023
Asphalt Repair	 21DB23-5 (S)	05/25/2026
Asphalt Sweeping	 21DB20-5 (S)	05/21/2026
Assorted Foods	 21RF07 (S)	08/25/2025
Athletic Uniforms & Apparel Discount Incentive - Bingham High School	 21RF72 (S)	05/25/2024
Athletic Uniforms and Apparel Discount Incentive - Copper Hills High School	 22RF08 (S)	09/28/2024
Athletic Uniforms & Apparel Discount Incentive - Herriman High School	 21RF22 (S)	01/26/2024
Banking Services	 19KP08P5 (S)	10/14/2024

Multi-District Cooperative Contracts (EdPAC)



- Not new, but the list is growing:
 - EdPAC – The Education Purchasing Advisory Committee
 - EdPAC has, as its goal, the increase of voluntary cooperative group purchasing by public school districts

State Cooperative Contracts



- The work as already been done for you!
 - 900+ contracts available and growing
 - <https://statecontracts.utah.gov/Home/Search>
- Follow the Order Instructions and Requirements on the contract
 - There may be multiple distributors for one contract

State Contracts on the JSD Purchasing Website

<http://purchasing.jordandistrict.org>



[Bids](#) [Contracts & Pricing](#) [Policy & Forms](#) [Central Warehouse](#) [Surplus & Fixed Assets](#) [Travel](#) [Contact Us](#)

State Contracts

This list was revised on August 23, 2023.

See the [STATE PURCHASING CONTRACTS WEBSITE](#) for more details.

Category / Vendor	Contract #	Vendor Contacts / Comments
Appliances		
Tristate Distributors	PD2155	Use state contracts website link above for more info.
American Sign Language Interpretation Services		
5 Star Interpreting	MA884	Use state contracts website link above for more info.
American Sign Language Communication	MA880	Use state contracts website link above for more info.
Interwest Interpreting	MA1070	Use state contracts website link above for more info.
Automatic External Defibrillators (AEDs)		
Stryker Medical	MA3313	Use state contracts website link above for more info.
Zoll Medical Corp	MA198	Use state contracts website link above for more info.
Buses		
Bryson Sales & Service Inc.	MA812	Use state contracts website link above for more info.
Lewis Bus Group	MA066	Use state contracts website link above for more info.
Rush Truck Centers of Utah Inc.	MA610	Use state contracts website link above for more info.

State Contracts on the State Website

<https://statecontracts.utah.gov/Home/Search>

The screenshot shows the website's header with navigation links: DAS HOME, BUILDING BOARD, ARCHIVES, DFCM, FINANCE, FLEET, PURCHASING, RISK, RULES. Below this are icons for STATE CONTRACTS, VENDORS, FOR AGENCIES, PURCHASING FORMS, CODE AND RULE, GENERAL SERVICES, DASHBOARD, ABOUT US, and CONTACT. A search bar and a 'more' dropdown are in the top right.

The main content area features a 'Search Contracts' section with a search bar containing 'school supplies' and a 'Search' button. To the right is a link for 'How to Use a Cooperative Contract'. Below the search bar are input fields for 'Enter the Keywords' and 'Enter the county name'. A 'Popular Keywords' section contains buttons for 'education learning material', 'janitorial supplies', 'smartphone and cell phone accessories', and 'laptop computers'.

The search results are summarized as 'Search Result - Total Contract(s) 38'. A table displays the following data:

Contract ID	Portfolio	Contractor Name	Expiry Date	Detail
MA2924	School Supplies - Curriculum - Games	LAKESHORE LEARNING MATERIALS	Expired	View Details
MA2925	School Supplies - Curriculum - Games	SCHOOL SPECIALTY INC	Expired	View Details
MA3787	Online Marketplace	AMAZON.COM SERVICES LLC	5/5/2025	View Details
MA3788	Educational School Supplies	FOLLETT CONTENT SOLUTIONS	5/5/2025	View Details

State Contracts on the State Website

<https://statecontracts.utah.gov/Home/Search>

Portfolio of Contract

Educational School Supplies
Contract Family : Office Supplies
Contract Tag : State Cooperative

Order Instructions

Please review this contract carefully. This contract is subject to change. The Division of Purchasing does not recommend that you print a copy due to the potential to change. Always view contract information online at www.purchasing.utah.gov.

When placing orders, make sure to identify your organization as a government entity (Eligible User) and provide the contract number. It is the responsibility of the Eligible User to ensure that the vendor is given the correct delivery and billing address. Eligible Users should return to the vendor any invoice which reflects incorrect pricing. Other items ordered that are not listed on the contract must be invoiced separately.

Eligible Users using FINET are recommended to use a DO to PRC or a PRC to make payments on purchases from a State Cooperative Contract in order to effectively track payments against the contract in FINET and Data Warehouse. If a DO to PRC or a PRC is not possible, Eligible Users using FINET may also use a GMA. Please utilize the vendor code on the contract when making payments. If you receive an invoice that does not match the vendor information on the contract, please notify the Division of Purchasing prior to processing your payment.

Award Category: Trade Binding, Library Binding from paper book, and library binding from hardcover book

To place an order, you can submit your request through your Titlewave account, by emailing FSSorders@follett.com, by fax, or by mail.

Please note: When placing an order, please include the following information (as applicable): quote ID number(s), name and number of this RFP, and your contract name and number. Providing this information at the time of order placement ensures that you receive the correct pricing and that your order is processed accurately.

Contract Details

Validity Date	7/1/2022 - 6/30/2027
Contract Documents	Contract Summary Full Contract

Other Contracts

(Not District,
EdPAC, or State)



- When to sign a contract?
 - It is important to understand when you are required to sign a contract in order to be bound by its terms. In general, you will be asked to sign a contract when:
 - You are entering into a business transaction with another party
 - You are hiring someone to provide services
 - You are leasing property or equipment
 - You are purchasing goods or services

When/Who Can Sign Contracts?



- When and **who** can sign district/school contracts?
 - **Less Than < \$5,000**
 - The administrator responsible for the budgetary expenditure either in a school or department. Delegated authority given by the Business Administrator.
 - **More Than > \$5,000**
 - The Business Administrator or Director of Purchasing (delegated by the Board of Education to procure goods or services on the district's behalf. Per district policy **BP178 – Purchasing Provisions**)

Who Can **NOT** Sign Contracts?



- **“Under no circumstances** should booster clubs, PTAs, PTOs, etc. sign any type of contract that would obligate the school or the district in any way or allow use of school or district logos, mascots or other tangible or intangible property.”
 - – *Jordan School District Financial Accounting Manual*
- Teachers/Coaches are **not** allowed to sign contracts
- Assistant Principals also should **not** sign contracts

Conclusion



- Contracts will make your purchasing duties **simpler**.
- Use the **JSD Purchasing Website** as a guide.
- There are **numerous contracts** available for your use.
- Contact Purchasing – we are here to help you!

Technology Updates

Tonya Hodges

Technology Updates



- It's wise to **plan ahead**.
- Some **supply chain disruptions** continue to affect technology purchases.
- Please be **diligent** about your Apple orders.

HP & Canon OEM Ink, Toner, & Supplies



- Ink and toner supplies for HP and Canon have been awarded to [multiple vendors](#).
- HP and Canon each have [5 vendors](#) you can select from.
- See the vendor list for contract 23THo4-5 on the Purchasing website under Contracts & Pricing / [District Contracts](#).
 - <https://purchasing.jordandistrict.org/>

HP Updates



- Chromebooks
 - Order now for better pricing
 - Basic / ~4 weeks
 - Touchscreen / 6-8 weeks
 - Touchscreen & Flip / 12+ weeks
- Desktops & Desktop Minis
 - Stock models / 4-8 weeks
 - Custom models / 8-12 weeks
- Mounting Brackets & Docking Stations / 6-12 weeks
- Monitors (varies by model)
 - P27h / 3-4 weeks
 - Other models / may be 4-12 weeks
- Laptops (varies by model) / 4-12 weeks
- Printers / 4-8 weeks (for most printers)

Apple Updates



- iPads / 2-5 weeks
 - Varies by model
- MacBook Airs / 2-4 weeks
 - M2 Chip 5-packs / 4-6 weeks
- MacBook Pros / 2-4 weeks
 - 14-inch 5-packs / 7-9 weeks
- Mac Minis / 2-4 weeks
- iMacs / 2-4 weeks

Receiving Ridiculousness



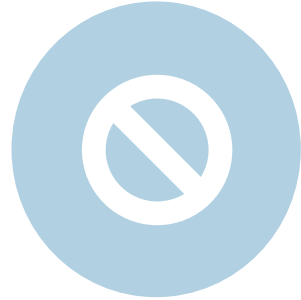
- **Inspect** all packages upon arrival
 - Do you **still want it?** (Don't open it if not!)
 - Is anything **damaged?**
 - Is the order **complete?**
 - If there is an **invoice** included, has it been stamped and sent to Accounting?

- **Contact Purchasing** with any issues or questions
 - **Returns** or **exchanges** (keep all packaging materials)
 - **Missing** or **damaged** items
 - **Haven't received** within 4-8 weeks of the PO being approved

P-Cards

Kris Wishart

P-Card Prohibitions



- Please **do not**...
 - Split orders of any kind
 - Purchase Fixed Assets
 - Purchase software that's not on the [JSD Learning Platform](#)
 - Make travel purchases such as hotel, airfare, or ride fees from your home to the airport
 - Approved travel charges are baggage fees, parking fees, and ride fees between airport and destination if no rental car/shuttle has been approved.
 - Give your P-Card to other employees

P-Card Prohibitions: Fixed Assets

Items that Need Asset Tags (generally \$150+)							Revised 1/24/2023
Technology	Audio Visual Equipment	Custodial Equipment	Kitchen Equipment (Industrial Type)	CTE Equipment	Copy Room Equipment	Misc.	Items Tracked by your School Tech
3D Printers	Amplifiers / Sound Systems / Speakers	Air Compressors	Deep Fryers	Auto Repair Equipment	Copiers	Base Stations	<i>The following items are NOT fixed assets, but are still tracked by Info Systems. Talk to your school tech if you receive these items.</i>
Charging Carts	Broadcasting Equipment	Blowers	Dishwashers	Clay / Molding Equipment	Electric Paper Cutters	Clothes Dryers	
Computers (Desktops) *	Cameras - Video & Photo	Buffers / Grinders	Freezers	Industrial Saws	Fax Machines	Clothes Washers	
Document Scanners	Document Cameras	Cutters / Trimmers / Shredders / Edgers	Ice Machines	Jointers	Laminators	Electronic Whiteboards (Smart Boards)	Apple TVs
Graphic tablets	Drones	Floor Machines	Kettles	Kilns	Paper Folding Machines	Evacuation Chairs	Chromebooks
Hotspots (use IMEI # for serial)	DVD / Blu-ray Recorders	Genie Lifts	Milk Coolers	Lathes	Paper Joggers	Exercise Machines (weight machines, treadmills, etc.)	Chromeboxes
iPads / Tablets	Learning Systems (such as VR, Nintendos, and other gaming systems)	Golf Carts / Mules	Mixers	Milling / Boring Machines	Plotters / Cricut Machines	Pianos *	
iPods	Lenses	High Pressure Washers	Ovens *	Planers	Postal Machines	Time Clocks	
Laptops *	Lighting Controls	Infield Drags	Proofers / Warming Cabinets	Presses		Any other items that cost \$5,000+	
POS Systems	Projectors	Key Machines	Refrigerators *	Sanders			
Printers	Receivers	Motor Scrubbers	Slicers	Sergers			
Robots †	Swivls	Mowers	Steam Cookers	Sewing Machines			
Walkie Talkies	Televisions	Tractors		Shapers / Routers			
Scanners	Tuners / Mixers / Switchers	Vacuums		Welders			
Servers							
* Chromebooks & Chromeboxes are tracked by school techs			* Household ovens and refrigerators you would find in a foods class or break room typically do not need tags			* Traditional pianos are the only musical instrument we tag.	
† Call before tagging.							
We do not tag any computer accessories (i.e. keyboard, mouse, stylus, docking station, etc.)							

This list is not exhaustive. If you are not sure if something needs a tag, especially if it's not listed—please give us a call. We are happy to answer questions!

Lesia Patterson - ext. 88717
Sandy Martinez - ext. 88719

P-Card Limits



- Single purchase limit
 - Email Kurt Prusse for requests for increase
 - Be specific – what is it for?
 - Is it over \$5,000?
- Monthly credit limit
 - Email Kurt Prusse for requests for increase

P-Card Reminders



- Check each **billing cycle** to see if you have **any charges**
- Submit your **P-card statement to Accounting by the 19th**
 - Must include **receipts** and **signatures**
- **Reconcile** on the US Bank website **before the 19th**
 - Write a **detailed description**
 - You can **start reconciling** as soon as a transaction posts to your account
- Reconciling a **Principal's/Director's P-card**
 - **Don't** use their login info.
 - Instead, contact **Dan Ellis** if you already have a P-card of your own, or contact **Kris Wishart** if not.

Questions?



- Visit the Purchasing website & review the [Training under Policy & Forms](#)
- If you can't find an answer there, please call me: [Kris Wishart, ext. 88708 \(801-567-8708\)](#)

Travel

Kurt Prusse

Travel



- Important Reminders:
 - A travel request must be entered into [Skyward](#) and [approved](#) by your supervisor before airfare, hotel, or conference fees are paid.
 - [45 days is the minimum](#) a travel request should be entered into Skyward to begin the booking process.
 - Post-conference expenses [will not](#) be reimbursed if not approved on the travel request form at time of travel booking.

Rental Cars



- Where and when available, shuttles, taxis, Uber/Lift, or public transportation are the **first options** for travel to/from the airport to/from the hotel or conference.
- **Rental cars are exceptions** to the travel policy and not the norm.
 - Rental cars must be **approved** during the travel approval process using the Skyward travel request form. The travel buyer can help in the reservation process.
 - For insurance and liability reasons, **state contracts** for rental cars must always be used if the district is paying. There are multiple carriers available.
- **Pre-approval by your supervisor** is necessary for both reimbursement and reconciliation when using your US Bank P-card.

Please contact us if you have questions!

purchasing.jordandistrict.org