



BUSINESS SERVICES  
DISTRICT PURCHASING, WAREHOUSING, PRINTING SERVICES  
NEWS LETTER – MAY 2018

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Follow-Up to 5/9/18  
Office Manager Mtg.



Thank you for participating in the office manager meeting on May 9<sup>th</sup>. I want to recap the important points and activities associated with the Purchasing discussion and update you on next steps due to some concerns that were raised.

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**TOPICS:**

- 1) MANDATORY INDIVIDUAL PO ENTRY FOR AMAZON ORDERS VS BLANKET ORDERS / WAREHOUSE RECEIPT OF AMAZON ORDERS VS DIRECT SHIPMENT TO SCHOOL SITES:

**THIS GOAL IS ON HOLD UNTIL FURTHER NOTICE.**

- A) Continue to enter orders as you have done previously. If you are one of sites that does enter individual orders now, please continue.
- B) If you are able to order from a vendor other than Amazon (and it's cost effective, and meets your timing needs, that will help during busy ordering periods) I've attached an updated list of vendors by category to assist in finding alternative vendors.
- C) It is extremely important that everyone acknowledges receipt of goods and signs off on invoices in a timely manner so Accounts Payable can process payments. We need your help to prevent credit holds which has prevented orders being placed with Amazon. We also run the risk of losing our account entirely which would have a major impact on efficiency, staff time and cost.

**NEXT STEPS**

- A) We will meet with a smaller group that includes school site staff to review options, issues, concerns and best way to move forward. This should help all of us get a better understanding of the needs of all departments, and school sites who would be impacted by a new process.

**2) MAIL / PACKAGES SENT TO THE WAREHOUSE FOR CENTRAL PROCESSING:**

**THIS GOAL IS ON HOLD UNTIL FURTHER NOTICE.**

- A) Continue to order stamps through the warehouse.

**NEXT STEPS**

- A) We will send out a survey to all school sites, and follow-up with individuals as necessary to make sure we completely understand the needs and unique situations that involve the processing of mail throughout the district.
- B) We will determine if it makes sense to meet with a smaller group of individuals and departments, including school sites, to review proposed changes before they are implemented.

**3) ASSET TAGGING:**

**THIS GOAL IS BEING IMPLEMENTED ON 7/1/18.**

- A) All asset tagging will be completed by our warehouse staff. Orders that include assets (items that have a value of over \$500 – tax, and shipping is included in the value.) should be directed to the warehouse for receipt and processing UNLESS the item is being installed at the time of delivery or weighs more than 500lbs. In these cases, the order should be delivered directly to the school. If questions, please call.

**4) CONFLICT OF INTEREST:**

**THIS GOAL HAS RECENTLY BEEN IMPLEMENTED.**

- A) A conflict of interest form for vendors is available on the district's purchasing website in the vendor section. Vendors should complete the form at the time they provide a W-9. This is for all new vendors going forward, we are not asking these forms to be completed for existing vendors, unless we believe there is a situation involving a conflict of interest.
- B) Employees that have relatives who are providing goods or services to the district, or employees who have a financial interest in a business that provides goods and services to the district should complete an employee conflict of interest form. If questions, please call.

**5) TRAVEL:**

**THIS GOAL IS DELAYED UNTIL OCTOBER / NOVEMBER FOR DISTRICT-WIDE ROLL OUT.**

- A) Our unique web-site for travel has been delayed by the Department of General Services.

**NEXT STEPS**

- A) We will implement / test the web-site on a pilot basis with a few school sites prior to the district-wide roll out so that we can work out any bugs, and start with a good process / procedure. If you would like to be part of the pilot program, please let me know....
- B) Formal training with all district staff will take place between September and November which will include training material, tutorials, etc.

**FINALLY – our #1 priority is service and support. It's not our intent to create additional work or confusing procedures and processes. It is with that in mind that we have revised our game plan for the goals above until we have more in-depth discussions with key users. Thank you again for your input at the meeting. We're listening.**