



CENTRAL UNIFIED SCHOOL DISTRICT

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Date: August 12, 2016

To: All Site Principals, Department Heads, Principal Secretaries, Finance Clerks and Budget Managers

From: Kelly Porterfield- Assistant Superintendent, Chief Business Officer
Yolanda Balladares – Director, Fiscal Services
Tatum Toste- Purchasing/ Warehouse Manager

RE: GIFT CARD, FOOD AND FLOWER, AND STAFF APPAREL PROCEDURE

The District often reviews and implements policies and procedures to better align itself with current federal, state and local policies and laws. Often times the purchase of food, flowers, gift cards or apparel can be mistaken for a gift of public funds, which is strictly prohibited by law. The law defines the purchase of such items as acceptable, so long as the expenditure(s) serve a public purpose in educating students. To avoid any possible misinterpretation, please take a moment to review the newly implemented policies regarding the purchase of food, flowers, gift cards and apparel.

GIFT CARD PROCEDURE

The District's programs and departments may use gift cards for student awards and student attendance incentives. Gift cards should not be used by or for District staff. Since gift cards cannot be purchased in the District's name or in individuals' names, they are easily negotiable as cash. Therefore, departments and sites need to be accountable with their gift card purchases and distribution.

- Purchase orders should always be used for gift card purchases. If a vendor will not accept a purchase order, please contact the Purchasing Department for further assistance.
- The purchase order should list the quantity of cards, denomination(s), program description or event date & purpose and names of the recipients if known.
- A maximum of \$10.00 per gift card, per student, is allowed.
- A maximum of 15 gift cards per purchase order is allowed.
- Gift card purchases on blanket purchase orders are not allowed.
- Once purchased, a detailed, itemized, original receipt should be submitted to accounts payable. The receipt should contain the quantity and denomination of each gift card.
- Gift cards should be carefully secured by the site /department prior to distribution.
- When gift cards are distributed, the attached "Gift Card Distribution Form" should be used and submitted to accounts payable.

District Administration

Laurel Ashlock, Ed.D, Assistant Superintendent, Chief Academic Officer • Ketti Davis, Assistant Superintendent, Professional Development
Jack Kelejian, Assistant Superintendent, Human Resources • Kelly Porterfield, Assistant Superintendent, Chief Business Officer

Paul Birrell, Director, 7-12 and Adult Education • Tami Boatright Ed.D, Director, K-8 Education • Andrea Valadez, Administrator, Special Education & Support Services

- All cards should be distributed in the fiscal year in which they are purchased. If at the end of the fiscal year, gift cards have yet to be distributed, then they must be surrendered along with the "Gift Card Distribution Form" to purchasing.

FOOD AND FLOWER PROCEDURE

The purchase of refreshments should always serve a public purpose and be directly connected to the education of our students. The District must maintain a reasonable balance between providing support for meetings / trainings we conduct and the fiduciary responsibility to not make a gift of public funds. It is not the District's responsibility to provide food for employees except under certain, approved, circumstances. The Superintendent, or designee, may conduct appropriate ceremonies where the purchase of food, beverages and décor may become necessary. Unless prior approval by the Superintendent or its delegated designee is granted, the purchase of food and/or flowers will not be recognized by the District.

- If food will be provided to District staff or visitors, using District funds or District Catering / Food Service, then an agenda or an explanation of the public purpose served, including expected number of participants must be provided to an approving official. When purchasing from an outside vendor or when an Employee is seeking personal reimbursement for food or flower purchase(s) they must **A)** be in possession of a valid District purchase order authorizing the expenditure(s) **B)** provide original itemized receipts **C)** provide a copy of the meeting agenda(s) for which the food or flowers were purchased. Cost should be minimal.
- In addition to the above, please take note that meetings, professional development, trainings etc. must be conducted for a minimum of two hours if food is to be provided. The required agenda should evidence the time requirement. Morning and afternoon meetings may include a beverage and a snack. Meetings that are conducted from mid-afternoon (after 3:00 pm) past 6pm may include a beverage and a substantial snack, i.e. ½ deli sandwich.
- All day meetings / professional development, trainings etc., are to include a lunch break long enough to allow participants to leave for a meal on their own. Lunch is NOT to be provided and is the employee's responsibility. If constraints make a working lunch important to cover material or maintain focus, the Superintendent or its designee, may approve a working lunch.
- Food / Flower expenditures must be purchased through discretionary funds, donated funds, or PTA / PFC organizations.
- All other policies regarding food/flower purchases remain unchanged, i.e. meal reimbursements while traveling, policies surrounding child nutrition, snack bar, home economics or class supplies etc.

District Administration

STAFF APPAREL

Staff apparel can promote school culture and team building. On the contrary, purchasing staff apparel may also be construed as a gift of public funds. In an effort to balance the need for staff apparel while being cognizant to not make a gift of public funds, the following procedure should be followed;

- Staff apparel used to promote school culture, may be purchased using discretionary funds, so long as the shirts are treated as a uniform and are submitted back to the site for reuse when the staff member separates from the site or District.
- Staff apparel used for sporting events, where the staff member is required for identifying reasons to wear the article, may be purchased using donated / fundraised athletic funds so long as the item is treated as a uniform and is returned after use.
- Staff apparel that will be retained by employees should be purchased through PTA's / PFC's, connected organizations or by the staff member directly.

When promoting positive performance or good behavior for students, the District encourages the purchase of items such as pencils, stickers, erasers, and general items promoting school spirit as an alternative to food, beverage or gift cards.

I would like to thank you in advance for taking the time to review and make note of the new procedures. Your cooperation is instrumental in making our District be the best it can be. If you have any questions, please contact Tatum Toste, Purchasing / Warehouse Manager, at 559-274-4700 x63112.

Sincerely,



Kelly Porterfield

District Administration

*Laurel Ashlock, Ed.D, Assistant Superintendent, Chief Academic Officer · Ketti Davis, Assistant Superintendent, Professional Development
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