

PO - JCCS All Staff

Stacy Spector

5/3/2016

Lora,

In addition to what I shared with you in the previous email (and the info we had provided per Dr. Robinson's request) we had also had specific conversations in Tactical and with principals and the classified staff about what was appropriate/not appropriate. It was the expectation that these leaders also communicate with staff that all materials had to follow both JCCS and SDCOE guidelines on purchasing for classroom materials, instructional supplies and professional learning. We also discussed that it had to pass the "sniff test" that it make sense and not be considered a gift of public funds. We knew there would be additional scrutiny for trying this new idea on and worked to ensure due diligence.

We physically monitored the purchases this way:

1. All staff received a colored wristband at sign in when they had signed in and received instructions from Admin Support about the 'voucher' process and requirements.
2. I verbalized to the audience the expectations for purchase. I gave examples of what would be considered an appropriate purchase for professional learning and for classroom materials and supplies.
3. Principals, Wendell and I (with help from 216 admin staff) then monitored staff selection of items at Lakeshore and Barnes and Noble. We focused primarily on Barnes and Noble due to the opportunity to choose an incorrect item.

As a team we have met and reviewed how to improve the process for next time to ensure all financial accounting and business processes are followed

After Action Review:

1. Don't start purchasing until administrator can visually check every item selected. (staff were released to start shopping while I was still responding to questions from other staff; we were also walking around helping staff select appropriate texts, not just double check at point of purchase)
2. Provide written copy of SDCOE and JCCS guidelines for purchasing.
3. Share with Business Services staff the types of titles staff might select to inform their practice and/or work with our population of students.
4. Ensure a check in with partner agency that their communication to their staff matches expectations for ours (their staff kept recommending to ours to "grab a candy bar, item near register" trying to be helpful for people to use their full allocation.
5. Provide application for Educator Discount prior to event to speed processing.

6. Reduce purchase window. (people had until almost 8:00 pm to purchase; most did before 7 but had one or two stragglers)

Let me know if you need additional info. We appreciate you and your team's support of this idea. We know this was an unorthodox manner in which to fully personalize the support and purchase of materials for staff.

Thanks.

Stacy Spector

Executive Director

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From: Lora Duzyk

Sent: Tuesday, May 3, 2016 2:40:13 PM

To: Stacy Spector

Subject: RE: PO - JCCS All Staff

Hi Stacy

These vouchers don't have any criteria on them telling employees what is an approved purchase other than no food. Is there a script or something in writing that was read to employees to know what they were told. You also told me that you, Sean or Wendell would be at the two locations to answer questions about appropriate purchases. Did this not happen?

Lora Duzyk

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VD

Vicki DeNardo

5/3/2016

[Barnes & Noble PD Voucher 3-10-16.docx19 KB](#)

[Lakeshore PD Voucher for SDCOE.docx28 KB](#)

2 attachments (48 KB) Show all 2 attachments (48 KB) Download all
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Good Morning, Lora,

I had previously sent this information to Sakura. What was communicated several times to staff was also written on the actual vouchers. **Our after action review of where we would have tightened up protocol would have been to have staff at the cashiers to monitor purchases** besides in the store to help with questions and correct purchases. I have attached the vouchers which includes purchasing guidelines. **It was verbally stressed several times that these purchases were for classroom materials, books, and professional learning/development.** Please let me know if I can be of further assistance.

Thank you,

Vicki

Vicki DeNardo

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Service and Leadership*

Stacy Spector

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5/3/2016

Lora,

Vicki will send you written copies of the directions provided to all staff.

I also verbalized the directions to everyone prior to releasing them to shop and gave specific examples of what would be/would not be an allowable purchase.

Debbie was in attendance to hear and see this as well.

Thanks.

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Sent from my iPhone. Siri has yet to fully learn my autocorrect. Any typos are her fault.

On May 3, 2016, at 6:37 AM, Lora Duzyk <lorad@sdcoe.net> wrote:

Good morning Stacy

We are reviewing the POs for your all staff event a couple months ago. In our discussions prior to the event you told me staff would be given explicit guidance on what expenditures would be allowed. Please send me the guidelines that you provided to your staff before they spent their vouchers.

Lora Duzyk

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