

FERNDALE SCHOOL DISTRICT NO. 502  
ADMINISTRATIVE PROCEDURES

No. 7000 P-2

MANAGEMENT BY OBJECTIVE REQUEST PROCEDURES

I. INTRODUCTION

- A. The MBO request procedure is designed to provide principals a means by which they may requests for instructional materials and equipment, non-instructional equipment, and facilities/ maintenance projects for which costs may be shared with, or borne by, the district.
- B. The MBO request form will serve as a control of expenditures and provide fiscal information for budget planning.
- C. Priority system for MBO requests is:
  - 1. MBO requests should be submitted by the date given in the timeline memorandum sent out in spring. However, MBO requests may also be submitted during the year.
  - 2. Principals are to indicate their assigned priorities on each MBO request; e.g., 1, 2, and 3.

II. THE MBO FORM

- A. The MBO form is renumbered with an original and four copies and is to be completed and routed as follows:
  - 1. Provide all information requested on the form including building budget account code (if applicable) and principal's signature.
  - 2. The originating principal will retain the GREEN copy.
  - 3. Forward Instructional Materials and Equipment requests to the superintendent for review.
  - 4. Forward Non-Instructional Materials and Equipment and Facilities Improvement requests to the business manger for review.

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III. INSTRUCTIONAL MATERIALS/EQUIPMENT MBO REQUESTS

A. Instructional materials and equipment are divided into several categories and are identified and defined as follow:

1. Supplies and materials are items of an expendable nature which are consumed in use.
2. Instructional materials are textbooks, audio-visual materials, kits and packets used in-lieu-of textbooks, and other commercially prepared and copyrighted materials ;that are used for the instruction of students in the classroom and other learning resources areas.
3. Instructional equipment is audio-visual equipment, welder, classroom office machines, science equipment, and any equipment directly related to the enhancement of the instructional program.

B. Procedures for submitting Instructional Materials/ Equipment MBO requests:

1. For new instructional materials, each request must:
  - a. Be reviewed and approved for trial use prior to the final approval by the building Instructional Materials Committee.
  - b. Have been reviewed for race, ethnic, and sex bias. These completed forms are to be kept on file in the principal's office.
  - c. Have an Instructional Materials Trial Use Request form attached and so indicate in space provided.
  - d. Be in compliance with all requirements as specified in Ferndale School District Instructional Materials Policy #2600.
2. For textbooks currently being used in the district, or on the approved list, the MBO request must so indicate in the space provided.
3. Send Instructional Materials/ Equipment MBO request(s) to the superintendent's office.
  - a. Disapproved requests will include reasons. The WHITE copy will be retained by the superintendent. The remaining copies will be returned to the principal.
  - b. Approved requests will be forwarded to the business manager by the superintendent. The WHITE copy will be retained by the superintendent. After budget review, the remaining copies will be

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returned to the originating principal, who will initiate and process a requisition for the material requested as follows:

- (1) Pre-fix the letters "MBO # \_ " to the requisition in the lower left hand corner.
  - (2) Sufficiently describe the materials to be ordered including price.
  - (3) If instructional materials are being ordered, the principal will indicate on the purchase order whether or not the instructional materials are "on trial use" or if they are "on approved list."
  - (4). Provide budget account code(s) and sign the purchase order in the space provided.
  - (5) Retain GOLD copy of MBO request and GOLD copy of requisition for building record. Remaining copies of the requisition will be attached to the remaining copies of the MBO request and forwarded to the business manager.
- C. The business manager, or designee, upon receipt of the approved MBO request and requisition, will process them jointly, following the procedures for processing requisition/purchase orders. Purchase order number will be affixed to the attached MBO request copies. The distribution will be as follows:
1. The original WHITE copy of the purchase order will be sent to vendor.
  2. The YELLOW copy of the MBO request will be attached to the YELLOW copy of the purchase order and retained in the business office file.
  3. The PINK copy of the MBO request will be attached to the PINK copy of the purchase order and returned to the originating principal.

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4. The principal will retain the PINK copy of the purchase order/MBO request until the materials have been received, at which time he/she will so indicate, sign, date, and return to the business office for payment.
5. When applicable, a copy of the trial use form will be forwarded to the curriculum task leader/administrator in charge.
6. In some cases, it may become necessary at a later date to initiate a second or third requisition for materials requested on a previously approved MBO. At this time:
  - a. Pre-fix the letters "MBO \_\_\_\_\_ " to the requisition in the lower left hand corner.
  - b. Attach a photocopy of the previously approved MBO to the requisition and forward to the business manger.
  - c. Upon receipt and approval of the requisition and attached photocopy, the business manager, or designee, will process them jointly, following the procedures for processing requisition/purchase orders and III. C. 1-5.

IV. NON-INSTRUCTIONAL EQUIPMENT/FACILITY IMPROVEMENT MBO REQUEST

- A. Facility Improvement requests will be forwarded to the business manager. The business manager and the director of buildings and grounds will review each building's facility requests, present them to the superintendent, and place within the budget and approved request(s).
- B. Non-Instructional Equipment (such as copy machines, typewriters, etc.) and Facilities/Maintenance MBO requests, if major, must have explanatory drawings/sketches or plans attached, and be forwarded to the business manager.
  1. Requests which have a significant impact on instructional programs, such as removing a wall, will be evaluated in consultation with the superintendent or designee.
  2. Disapproved requests will include reasons. The WHITE copy will be retained by the business manager. The remaining copies will be returned to the principal.
  3. Approved requests will be signed by the business manager. The WHITE copy will be retained by the business manager. The remaining copies will be returned to the principals, who will initiate and process a requisition, if required.

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- a. If the request requires a requisition, follow instructions for the requisition/purchase order procedures in III. B. 3. b.
- b. If the equipment is to be constructed by the maintenance department, the business manger will retain the WHITE copy of the request, forward the YELLOW copy to the maintenance department, and the pink copy to the principal.
  - (1) Upon completion of the project, the maintenance supervisor will return the YELLOW copy of the request to the business manager and will show:
    - (a) Date of project completion;
    - (b) The cost of the labor;
    - (c) The cost of the materials
  - (2) The YELLOW copy of the MBO request will be retained in the business office.

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