

**Mountain View Whisman School District**

**CHECKLIST**

**Purchasing Processes and Procedures for  
Services, Equipment, Materials and Supplies**

**Contract for Professional Services / Special Services**

- \$75,000 or below.** Check this box; no further steps required.
- Above \$75,000.** Check this box and complete the following items:
  - \_\_\_ proposals received (seek multiple proposals to select a qualified, best value, reasonably-priced vendor.)
  - Review vendors' websites, references and qualifications to ensure applicable past experience.

**Contract for Services (NOT Special Services)**

- Below \$114,500.** Check this box and complete the following items:
  - \_\_\_ proposals received (seek multiple proposals to select a qualified, best value, reasonably-priced vendor.)
  - Review vendors' websites, references and qualifications to ensure applicable past experience.
- \$114,500 and above.** Check this box and formally bid pursuant to the Formal Bid Process in the Purchasing Processes and Procedures document.

**Contract for Architects, Engineers, Construction Project Managers, Environmental Consultants, and Surveyors**

- Check this box and follow the RFQ/RFP Process steps in the Purchasing Processes and Procedures document.

**Contract for Construction, Repair and Maintenance**

- Up to \$75,000.** Check this box and complete the following items:
  - \_\_\_ proposals received (seek multiple proposals to select a qualified, best value, reasonably-priced vendor.)
  - Review vendors' websites, references and qualifications to ensure applicable past experience.
- \$75,001 to \$220,000.** Check this box and **informally** bid pursuant to the Formal Bid Process in the Purchasing Processes and Procedures document.
- \$220,001 and above.** Check this box and **formally** bid pursuant to the Formal Bid Process in the Purchasing Processes and Procedures document.
- Lease-Leaseback.** Check this box and utilize an RFQ, RFQ/P or RFP process with the assistance of legal counsel to ensure compliance with all Board-approved procedures pursuant to Educ. Code §17406.
- Design-Build.** Check this box and utilize an RFQ, RFQ/P or RFP process with the assistance of legal counsel to ensure compliance with all procedures pursuant to Educ. Code §§17250.10 et seq. or 17250.60.

**Contract for Equipment, Materials and Supplies**

- Below \$114,500.** Check this box and complete the following items:
  - \_\_\_ proposals received (seek multiple proposals to select a qualified, best value, reasonably-priced vendor.)
  - Review vendors' websites, references and qualifications to ensure applicable past experience.
- \$114,500 and above.** Check this box and formally bid pursuant to the Formal Bid Process in the Purchasing Processes and Procedures document.

**Contract for Technology: Computers, Software, Telecommunications Equipment and Other Technology**

- Check this box and follow the RFQ/RFP Process steps in the Purchasing Processes and Procedures document, plus the procurement steps in that document for Public Contract Code §20118.2.

**Contract for Educational Materials**

- Check this box and complete the following items:
  - \_\_\_ proposals received (seek multiple proposals to select a qualified, best value, reasonably-priced vendor.)
  - Review vendors’ websites, references and qualifications to ensure applicable past experience.
  - Ensure the Board considers, selects and evaluates those items through the District’s process outlined in Board Policy and Administrative Regulation 6161.1.

**Contract for Perishable Foods**

- Check this box and complete the following items:
  - \_\_\_ proposals received (seek multiple proposals to select a qualified, best value, reasonably-priced vendor.)
  - Review vendors’ websites, references and qualifications to ensure applicable past experience.

**Contract for Waste Services**

- Check this box and follow the applicable steps in the Purchasing Processes and Procedures document.

**Contract for Transportation (Bus, Cars, etc.) Services**

- Check this box and follow the applicable steps in the Purchasing Processes and Procedures document.

**Contract for Energy Services That Will Generate Cost Savings**

- Check this box and follow the RFQ/RFP Process steps in the Purchasing Processes and Procedures document, plus the procurement steps in that document for Government Code §4217.10.

**Contract Utilizing a “Piggyback Agreement” with Another California Entity**

- Check this box and follow the applicable steps in the Purchasing Processes and Procedures document.

**Contract Utilizing a CMAS or Other “Leveraged Procurement Agreement” via the California Dept. of General Services**

- Check this box and follow the applicable steps in the Purchasing Processes and Procedures document.

**Contract Utilizing an On-Line /Out-Of-State “Cooperative Purchasing Agreement”**

- Check this box and follow the applicable steps in the Purchasing Processes and Procedures document.

**Emergency Contracts**

- Check this box and follow the applicable steps in the Purchasing Processes and Procedures document.

**Both of these signatures are required:**

Dated: \_\_\_\_\_, 20\_\_\_\_

Dated: \_\_\_\_\_, 20\_\_\_\_

**Approval by Department Head**

(Minimum: Manager Level)

**Approval by Person with Delegated Authority**

(Superintendent, CBO, Assoc. / Ass’t. Superintendent)

Signature: \_\_\_\_\_

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Print Name: \_\_\_\_\_

Print Title: \_\_\_\_\_

Print Title: \_\_\_\_\_