

MOUNTAIN VIEW WHISMAN SCHOOL DISTRICT
Purchasing Processes and Procedures for Services, Equipment, Materials and Supplies

CHECKLIST

***REQUIRED*:**

- ☐ MVWSD Independent Contractor for Professional Services Agreement (PSA) completed
- ☒ If MVWSD PSA is **NOT** used, explanation with corresponding documents is attached.

☐ Contract for **Professional Services / Special Services**

- ☐ \$50,000 or below, no further steps required.
- ☐ \$50,001 and above, completed the following items:
- ☐ ____ proposals received (seek multiple proposals to select a qualified, best value, reasonably-priced vendor.)
 - ☐ Reviewed vendors' websites, references and qualifications to ensure applicable past experience.

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

- ☐ \$50,000 or below, no further steps required.
- ☐ \$50,001 - \$114,500, completed the following items:
- ☐ ____ proposals received (seek multiple proposals to select a qualified, best value, reasonably-priced vendor.)
 - ☐ Reviewed vendors' websites, references and qualifications to ensure applicable past experience.
- ☐ \$114,501 and above, followed the Formal Bid Process in the Purchasing Processes and Procedures document.

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

- ☐ Followed the RFQ/RFP Process steps in the Purchasing Processes and Procedures document.

☒ Contract for **Construction, Repair and Maintenance**

- ☐ Up to \$75,000, completed the following items:
- ☐ ____ proposals received (seek multiple proposals to select a qualified, best value, reasonably-priced vendor.)
 - ☐ Reviewed vendors' websites, references and qualifications to ensure applicable past experience.
- ☐ \$75,001 - \$220,000, followed the **Informal** Bid Process in the Purchasing Processes and Procedures document.
- ☐ \$220,001 and above, followed the **Formal** Bid Process in the Purchasing Processes and Procedures document.
- ☐ Lease-Leaseback, utilized 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, utilized 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**

- ☐ \$75,000 or below, no further steps required.
- ☐ \$75,001 - \$114,500, completed the following items:
- ☐ ____ proposals received (seek multiple proposals to select a qualified, best value, reasonably-priced vendor.)
 - ☐ Reviewed vendors' websites, references and qualifications to ensure applicable past experience.
- ☐ \$114,501 and above, followed the Formal Bid Process in the Purchasing Processes and Procedures document.

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

- ☐ Followed 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**

- ☐ ___ proposals received (seek multiple proposals to select a qualified, best value, reasonably-priced vendor.)
- ☐ Reviewed vendors' websites, references and qualifications to ensure applicable past experience.
- ☐ Ensured the Board considers, selects and evaluates items through the District's process outlined in Board Policy and Administrative Regulation 6161.1.

☐ **Contract for Perishable Foods**

- ☐ ___ proposals received (seek multiple proposals to select a qualified, best value, reasonably-priced vendor.)
- ☐ Reviewed vendors' websites, references and qualifications to ensure applicable past experience.

☐ **Contract for Waste Services**

- ☐ Followed the applicable steps in the Purchasing Processes and Procedures document.

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

- ☐ Followed the applicable steps in the Purchasing Processes and Procedures document.

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

- ☐ Followed 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**

- ☐ Followed the applicable steps in the Purchasing Processes and Procedures document.

☐ **Contract Utilizing CMAS or Other "Leveraged Procurement Agreement" via the California Dept. of General Services**

- ☐ Followed the applicable steps in the Purchasing Processes and Procedures document.

☐ **Contract Utilizing an On-Line /Out-Of-State "Cooperative Purchasing Agreement"**

- ☐ Followed the applicable steps in the Purchasing Processes and Procedures document.

☐ **Emergency Contracts**

- ☐ Followed the applicable steps in the Purchasing Processes and Procedures document.

***Both signatures below are required* --- Attach this document to each PSA**

[*For requisitions, QCC approvals are accepted as signatures]

Dated: December 11, 2024

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Approval by Department Head

(Minimum: Manager Level)

Signature: _____

Jason Cave

Print Name: _____

Jason Cave - Greystone West Company

Print Title: _____

Construction Manager

Approval by Person with Delegated Authority

(Superintendent, CBO, Assoc. / Asst. Superintendent)

Signature: _____

Rebecca Westover

Print Name: _____

Rebecca Westover

Print Title: _____

Chief Business Officer