

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: _____, 20__	Dated: <u>January 22</u> _____, 20__
<u>Approval by Department Head</u> (Minimum: Manager Level)	<u>Approval by Person with Delegated Authority</u> (Superintendent, CBO, Assoc. / Asst. Superintendent)
Signature: _____	Signature:  _____
Print Name: _____	Print Name: <u>Rebecca Westover</u>
Print Title: _____	Print Title: <u>Chief Business Officer</u>