



Mountain View
Whisman
School District

Vendor Selection Checklist

March 6, 2025



Mountain View
Whisman
School District

Strategic Plan 2027

Strategic Plan 2027

Goal Area 5

- Equitable distribution of resources that support student success.
- Goal 5a: Ensure facilities and resources equitably serve all students.



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Vendor List

Vendor Selection Checklist

- Over the last few months as the District has implemented the checklist process for vendor selection
- There has been a need to refine the process to ensure workflow continues effectively
- RFPs can take a minimum of 45 days to complete and depending on the professional service some vendors may not respond due to fiscal and time constraints.
- Additionally if there is a long standing relationship with a vendor it may not be advantageous to the district for an RFP to be issued when there is known and reliable track history.

Vendor List

- This list would be considered the MVWSD vendor list that could be utilized without the the requirement of doing an RFP if over \$50,000 for a professional service.
- Professional services refer to specialized functions requiring unique skills, knowledge, and expertise, often of a mental or intellectual nature, provided by independent contractors. These services include, but are not limited to, architecture, engineering, financial, legal, and accounting services, and are typically exempt from competitive bidding requirements.

Vendor List

- The list was created by looking at current trustworthy contracts and vendors that the District has used in the past for services.
- Services include Special Ed contractors who have relationships with students, professional development providers that are connected to our adopted curriculum, attorneys, and services related to a niche area.
- It is the intention of staff to update this list and bring it to the Board for approval as needed.



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Check List Update

MOUNTAIN VIEW WHISMAN SCHOOL DISTRICT

Purchasing Processes and Procedures for Services, Equipment, Materials and Supplies - CHECKLIST

Vendor Name:

REQUIRED CHECKBOX

- ☐ 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.

***If it is advantageous for the district to pursue a particular vendor, a justification can be attached.**

☐ **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 Waste Services (MOT or CBO)**

- ☐ 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 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 (Ed Services)**

- ☐ _____ 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.

Allowing for a sole source vendor if advantageous to the district.

☐ Contract for Perishable Foods {Child Nutrition}
☐ _____ 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 Utilizing a "Piggyback Agreement" with Another California Entity {Business Office}
☐ Followed the applicable steps in the Purchasing Processes and Procedures document.
☐ Contract Utilizing CMAS / Other "Leveraged Procurement Agreement" via the CA Dept of Gen Svcs {Business Office}
☐ Followed the applicable steps in the Purchasing Processes and Procedures document.
☐ Contract Utilizing an On-Line /Out-Of-State "Cooperative Purchasing Agreement" {Business Office}
☐ Followed the applicable steps in the Purchasing Processes and Procedures document.
☐ Contract for Construction, Repair and Maintenance {MOT or CBO}
☐ 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 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.
☐ Emergency Contracts {CBO Only}
☐ Followed the applicable steps in the Purchasing Processes and Procedures document.

Both signatures below are required

Dated: _____, 20____	Dated: _____, 20____
Approval by Department Head (Minimum: Manager Level)	Approval by Person with Delegated Authority (Superintendent, CBO, Assoc. / Asst. Superintendent)
Signature: _____	Signature: _____
Print Name: _____	Print Name: _____
Print Title: _____	Print Title: _____

For Department:

Not required for school sites

Removing the
checklist from
school sites



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Questions