MOUNTAIN VIEW WHISMAN SCHOOL DISTRICT

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

Vendor Name: HeartLand School Solutions

***REQUIRED CHECKBOX* for Service Contracts**

- ☐ **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

- ☐ **Up to $50,000**, 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)

- ☐ **Up to $50,000**, no further steps required.
- ☐ **$50,001 - $114,799**, 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.
- ☐ **$114,800 and above**, followed the Formal Bid Process in the Purchasing Processes and Procedures document.

☐ Contract for Architects, Engineers, Construction Project Managers, Environmental Consultants, & 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 Services (Bus, Cars, etc.)

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

☐ Contract for Equipment, Materials and Supplies

- ☐ **Up to $75,000**, no further steps required.
- ☐ **$75,001 - $114,799**, 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.
- ☐ **$114,800 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 procurement steps for "Equipment, Materials and Supplies."
- ☐ 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 {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 Agreements" via the CA Dept of Gen Svcs {Business Offc}**

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

☐ **Contract Utilizing an On-Line /Out-Of-State "Cooperative Purchasing Contracts" {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.

☐ **Contract for Emergencies {CBO Only}**

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

Both signatures below are required

Approval by Department Head (Minimum: Manager Level)		**Approval by Person with Delegated Authority** (Superintendent, CBO, Assoc. / Asst. Superintendent)	
Signature:	Sophia Zalot	Signature:	[signature]
Date:	7/25, 20 25	Date:	July 29, 20 25
Print Name:	Sophia Zalot	Print Name:	Dr. Rebecca Westover
Print Title:	temp Director C.N.	Print Title:	Chief Business Officer

Checklist not required for school sites

Annual license for Nutri Kids
$1,449.00

Heartland

Invoice

Heartland Payment Systems
dba Heartland School Solutions
Heartland, PO Box 936565,
Atlanta, Georgia 31193-6565

Invoice : HSSREC036879
Due Date : 08/30/2025
Date : 07/31/2025
Page No : 1 / 1

Bill To:	**Ship To:**
Mountain View Whisman School District 750 San Pierre Way A, Accounts Payable Mountain View, CA 94043-3133 United States	Mountain View Whisman School District 750 San Pierre Way A, Food Service Mountain View, CA 94043-3133 United States

Purchase Order No	Customer ID	Salesperson ID	Shipping Method	Payment Terms	Req Ship Date
ANNUAL SUPPORT	HSS4327852-118368		Ground	Net 30	07/31/2025

Ordered	Invoiced	Item Number	Description	Unit Price	Ext Price
1	1	HSS0367	SUP: NK Production Records Annual 08/01/25 - 07/31/26	$166.00	$166.00
1	1	HSS0368	SUP: NK Recipe and Costing Annual 08/01/25 - 07/31/26	$130.00	$130.00
1	1	HSS0366	SUP: NK Menu Planning Annual 08/01/25 - 07/31/26	$425.00	$425.00
2	2	HSS0369	SUP: NK Site MP (non-network) Annual 08/01/25 - 07/31/26	$182.00	$364.00
2	2	HSS0371	SUP: NK MP Network License Annual 08/01/25 - 07/31/26	$182.00	$364.00

Comments:

Subtotal	$1,449.00
Tax	$0.00
Freight	$0.00
Trade Discount	$0.00
Total	$1,449.00
Payment Received	$0.00
Credits/Refunds	$0.00
Adjustments	$0.00
Amount Due	$1,449.00