

Memorandum of Understanding
between
Santa Clara County Office of Education
and
Mountain View Whisman - Mariano Castro Elementary School

This Memorandum of Understanding (MOU), hereinafter referred to as the "Agreement", is between the Santa Clara County Office of Education (SCCOE) and Mountain View Whisman - Mariano Castro Elementary School (the "Agency"). SCCOE and the Agency can each be referred to as the "Party" or collectively as the "Parties" for the purpose of this Agreement.

1. Overview

This Agreement outlines the terms, responsibilities, and commitments of each Party regarding the participation, fiscal, and site implementation of a school-based Wellness Center as articulated in the CCSPP Implementation Cohort 1 grant.

SCCOE and the Agency agree to the stated roles and responsibilities under Section 3, as it relates to the Wellness Center established on the following campus: Mariano Castro Elementary School, 500 Toft Street, Mountain View, CA 94041.

The objective of this partnership is to ensure students have prompt and readily available preventive and early intervention mental health and wellness services, aimed at mitigating the escalation of mental health and wellness concerns in both severity and effect. The Wellness Center is one component of a "whole child approach" to support students and to bring the vision of schools as centers of wellness to life.

2. Goals

- ☒ Improve access to inclusive, equitable, high-quality education.
- ☒ Provide quality support to districts, schools, students, and communities.
- ☒ Be a premier service organization.

3. Responsibilities

3.1. The Agency Responsibilities:

Facilities

- The Agency agrees to provide facility space for the operation of the school-based Wellness Center, as follows:
 - A designated Wellness Center space for drop-in services that is at least 10' x 12' in size, such as a classroom, conference room, etc.
A designated Wellness Center confidential office space with a closeable door that is at least 7' x 8' in size, to be used for the provision of counseling and other health and wellness services provided by the SCCOE.
 - The Agency shall either designate space for group services or provide access to space for group services rendered by the SCCOE and/or by its contracted partners. The space for group services shall be at least 10' x 10' in size and must be different from the drop-in space. If designating

- space for the provision of group services, the Agency designates a room.
- If the Agency is unable to designate Wellness Center drop-in space, confidential office space, and/or group services space as outlined above, with written agreement from the SCCOE, the Agency may choose to utilize a removable structure on campus.
- The Agency agrees that:
 - The designated facilities shall be used for the sole purpose of Wellness Center operations.
 - The designated facilities shall not be used by any other programs or staff without consent from the SCCOE.
 - The designated facilities shall not be changed, nor shall SCCOE staff be displaced, without consent from the SCCOE.
 - The designated facilities shall be empty and free of all storage materials, furniture, and traditional classroom items, such as student desks and textbooks, not expressly stated in the furniture and equipment agreements below.
- The Agency will provide SCCOE Wellness staff with keys, as follows:
 - Key(s) to each of the designated spaces on campus.
 - Key(s), or an access code, to access the campus if there are locked gates and/or doors.
 - Key(s) for access to the staff restroom.
 - Keys for any other locked spaces on campus that Wellness staff will need to access, such as a staff resource room, mailbox, and/or lockable cabinets within the designated spaces.
 - Key(s) on an as-needed basis for shared space utilized for the provision of group services, if the Agency is not designating a space for the provision of group services.
 - Note - One (1) copy of each key shall be assigned to each SCCOE Youth Health and Wellness staff member and their MHW Coordinator.
- Failure or delay in the provision of Wellness Center workspaces may result in a delay of the opening of the center.

Group Services & Contracted Providers

- The Agency agrees to allow SCCOE to bring contracted service providers on site for the provision of Tier 1, Tier 2, and/or Tier 3 health and wellness services. Standards for partnership with contracted providers will be assured, in accordance with Section 3.2 of this agreement.
- The Agency shall notify SCCOE Wellness staff each time SCCOE contracted providers come on site for the provision of services, and shall direct contracted providers to check in with SCCOE Wellness staff upon their arrival.
- The Agency shall be responsible for determining all required clearances and/or approvals necessary for contracted service providers to have contact with or access to the Agency's students.

Operational Support

- The Agency will provide SCCOE Wellness staff with access to the site resources and materials made available to other school staff members, including:
 - High volume printer
 - Photocopier
 - Fax machine
 - Paper: butcher paper, colored paper, printer paper, etc.
 - Adopted Social Emotional Learning (SEL) curriculum
 - The Agency will provide SCCOE with access or print cards needed to operate these resources, as

applicable.

- The Agency may choose to purchase additional wellness related tools, materials, and supplies for the drop-in space and/or confidential office space, at its discretion.

Partnership & Collaboration

- The Agency will ensure that at least one district leader participates in a Community of Practice or Work Group facilitated and/or hosted by the SCCOE's Youth Health and Wellness Department.
- The Agency will ensure that the school principal (or designee) and at least one district administrator participates in a quarterly Wellness Center leadership team meeting.
- The Agency will allow faculty meeting, grade level/department meeting, or other meeting time for ongoing professional development and/or presentations to staff related to matters of youth health and wellness, including:
 - Time at the beginning of the year to do a Wellness Center introduction and overview.
 - Two to three (2-3) professional development sessions throughout the school year facilitated and/or hosted by SCCOE Wellness staff (topics to be determined based upon site needs).
- The Agency will ensure SCCOE Wellness staff receive all school communication, including but not limited to staff memos, family newsletters, school-wide communication, and invitations to staff meetings.
- The Agency will provide SCCOE Wellness staff with a school site calendar that includes staff meetings and events (e.g., all staff meetings, professional development days) and family/community meetings and events (e.g., Back-to-School events, Open House, Cafecitos).
- The Agency will provide opportunities for SCCOE Wellness staff to participate in community events, which may include Principal's Coffees, Back-to-School Night, Open House, etc.
- When referring a student to the Wellness Center for direct services, the Agency will provide a copy of a signed Release of Information (ROI) that allows information to be exchanged between the Agency and the SCCOE, thereby increasing partnership and collaboration.
- The Agency will immediately report any personnel, safety, and/or major operational concerns to the SCCOE Wellness Supervisor.

Data & Technology

- The Agency will provide district internet connectivity to Wellness Center facilities and devices.
- The Agency will provide each SCCOE Wellness Center staff member with a district email address within three to five (3-5) days of their SCCOE-issued start date. Failure or delay in the provision of a district email address may result in a delay of the opening of the center.
- The Agency will provide each SCCOE Wellness Center staff member with access to the district's Student Information System (SIS) within three to five (3-5) days of their SCCOE-issued start date. Failure or delay in the provision of SIS access may result in a delay of the opening of the center.
- The Agency will include SCCOE Wellness staff on all relevant email distribution lists, including 'all staff'.

3.2. The SCCOE Responsibilities:

Human Resources

- The SCCOE may provide staff to supplement, expand, and/or fill existing gaps in staffing. In accordance with the SCCOE Wellness Center model, the SCCOE may provide the following site-based Wellness staff members:

- Mental Health Specialist (0.5 FTE) For specific roles and responsibilities, please refer to the corresponding job description listed on the SCCOE's website.
- Wellness Center Liaison (1.0 FTE) For specific roles and responsibilities, please refer to the corresponding job description listed on the SCCOE's website.
- SCCOE Wellness staff's work week is Monday through Friday for a total of five (5) days per week, not including holidays and breaks.
- SCCOE Wellness staff may work special events, such as Back-to-School Night and Open House, and/or may host community events outside of the traditional work schedule with permission from their SCCOE supervisor.
- The SCCOE will provide an employee calendar to the site principal for each Wellness staff member. The employee calendar will be informed by the Agency's calendar and shall be developed in accordance with SCCOE observed holidays.
- SCCOE Wellness staff work eight (8) hours per day. Staff break and lunch periods will be adhered to as outlined in the respective collective bargaining agreement. Please refer to the corresponding contract/agreement listed on the SCCOE's website.
- All Human Resources matters, including staff evaluations, will be addressed by the SCCOE supervisor in accordance with the SCCOE and the unit member's respective collective bargaining agreement. Please refer to the corresponding contract/agreement listed on the SCCOE's website.
- The SCCOE will provide supervision, evaluation, professional learning, and monthly team meetings to Wellness staff in order to assure that staff:
 - Implement SCCOE's Wellness Center model and framework in collaboration with the school site.
 - Maintain professionalism with students, families, and colleagues.
 - Maintain confidentiality of student matters.
 - Adhere to legal and ethical practices.
 - Provide leadership to coordinate and collaborate with other partners and service providers, including those on the school campus and those off-site.
 - Follow procedures that ensure the school is able to generate revenue for behavioral health services provided, thereby supporting the sustainability of the program.
- SCCOE Wellness staff will work in partnership with existing site and/or district-based mental health and community outreach personnel in order to coordinate and leverage resources and support for students, families, and community.
- SCCOE Wellness staff will be available for crisis support on the school campus. At the SCCOE's discretion, Wellness staff may temporarily be assigned to assist with crisis response efforts off-site.

Furniture & Equipment

- The Agency or the SCCOE will provide the following furniture for Wellness Center staff:
 - (1-2) Lockable file cabinets, each with a key
 - (1-2) Staff office desks
 - (1-2) Staff office chairs
 - (1-2) Staff computers
 - (1-2) Staff desktop monitors
 - (1-2) Staff keyboards
 - (1-2) Staff computer mice
 - (1) Projector
 - (1) Wellness Center printer

- SCCOE internet connectivity
- Furniture shall meet SCCOE workspace expectations set forth in the respective collective bargaining agreement. Please refer to the corresponding contract/agreement listed on the SCCOE's website (<https://www.sccoe.org/depts/human-resources/lists/contracts%20and%20agreements/allitems.aspx>).
- All items purchased by the SCCOE will be the property of the SCCOE.

Operational Support

- The SCCOE will purchase an initial Wellness Center toolkit consisting of regulation tools, such as fidgets.
- The SCCOE may provide a Social Emotional Learning (SEL) curriculum, to be utilized by SCCOE Wellness staff. If the Agency has an adopted SEL curriculum, SCCOE Wellness staff will utilize this curriculum and may use SCCOE provided supplemental curriculum to expand upon support and/or target specific needs.
- The SCCOE will establish partnerships with community-based organizations, such as those who provide non-traditional therapeutic modalities, in order to expand the school site's existing wellness continuum of care. Standards for partnership will be assured through the establishment of a Professional Services Agreement, which entails insurance verification, criminal background check, verification of mandated reporter training, and Tuberculosis screening.

Data & Technology

- The SCCOE will provide each SCCOE Wellness staff member with access to the SCCOE's Electronic Health Record (EHR) system.
All data in the SCCOE Electronic Health Record System will follow FERPA/HIPPA compliance. Data may be used for reimbursement of services billed to the CYBHI Statewide Multiplayer Fee Schedule.

Program Evaluation

- The SCCOE will conduct an evaluation of program effectiveness that utilizes program data (i.e., formative and summative data collected via surveys and assessment, referral, case management, and direct service data) to fulfill grant or funding requirements and obtain additional funding for sustainability of the Wellness Center program.

Insurance Billing

- The SCCOE will provide service free of charge to students, in accordance with the law. Students may not be charged a co-pay or fees by the SCCOE or by their insurance provider.
- The SCCOE will claim reimbursement for services rendered. Claims will be submitted to available health insurances, including Medi-Cal, Managed Care Plans, and Commercial Health Plans, in accordance with federal, state, and local policy, and with consent from the caregiver/parent, where applicable.
- The SCCOE will work in partnership with the Agency to ensure that billing completed by the SCCOE will not impact any billing being done by the Agency and/or school site.

Professional Learning Opportunities

- The SCCOE will provide technical assistance to school site and district staff related to Wellness Center implementation.

- The SCCOE will offer professional learning opportunities to school site and district staff, such as Communities of Practice and Work Groups.
- The SCCOE will provide professional learning opportunities for staff at school sites with an SCCOE Wellness Center and at other school sites as well.
- The SCCOE will provide technical assistance to school sites/districts interested in implementing and/or expanding their Wellness Centers, when requested and contingent upon SCCOE capacity.

3.3. Shared Responsibilities:

Staffing

- In the event that a Wellness Center Liaison or Mental Health and Wellness (MHW) Specialist resigns or otherwise vacates their position during the term of this Agreement, SCCOE shall not be obligated to hire or backfill the position. Instead, the District shall assume responsibility for filling the vacancy and associated employment obligations. SCCOE may transition to a reimbursement model for any applicable services rendered, subject to mutual agreement.
- Any changes to this provision, including but not limited to any modifications regarding hiring responsibilities or reimbursement procedures, must be made through a written amendment to this Agreement, signed by both parties.

Partnership & Collaboration

- The Agency, including the site principal, will participate in at least three (3) planning sessions with SCCOE Wellness leadership prior to SCCOE Wellness Center staff beginning on campus, or until the needs assessment, asset mapping, staff onboarding and integration plan, and continuum of care are completed in partnership.
- The Agency, including the site principal and any site-based mental health providers (e.g., school counselor, psychologist, social worker), will participate in at least three (3) planning sessions with SCCOE Wellness leadership and SCCOE Wellness Center staff prior to the opening of the school's Wellness Center, or until the referral pathway, youth advisory planning, and roll out plan are completed in partnership.
- During the first two months of implementation, the Agency, including site principal (or designee) and any site-based mental health providers (e.g., school counselor, psychologist, social worker), SCCOE Wellness leadership, and SCCOE Wellness Center staff will meet as a Wellness Team on a weekly basis.
- After the first two months of implementation, the Agency and the SCCOE will determine the frequency of Wellness Team meetings, with at least a monthly meeting occurring between site principal (or designee), site-based mental health providers (e.g., school counselor, psychologist, social worker), and SCCOE Wellness Center staff.
- Both the Agency and the SCCOE will develop a plan to integrate SCCOE Wellness staff into their respective school site, inclusive of site-based staff meetings, site-based student support teams (e.g., MTSS, COST, SST, ISS, PBIS), referral meetings, School Link Services work, and other school activities and meetings related to student mental health and wellness.
- Extended day Wellness staff support, such as for evening family/community engagement events, may be requested and is possible, pending funding, staff availability, and approval from the SCCOE Wellness Supervisor.

Youth Advisory Group (YAG)

- The Agency and the SCCOE will work collaboratively to develop and co-facilitate a site-based Youth Advisory Group (YAG), in alignment with the criteria below:
 - Provide opportunities to develop youth leadership, with a specific focus on mental health, wellness, and peer supported activities.
 - Ensure YAG feedback and leadership informs the activities and services provided by the Wellness Center.
 - Provide evidence of how site-based youth voice shapes opportunities for student and community support within the Wellness Center.
 - Provide YAG with opportunities to co-develop Wellness Center messaging and collateral.
 - Provide opportunities for YAG members to communicate in advocacy and outreach through participation in policy events, activities, social media, and photo and video campaigns related to Mental Health & Wellness and the Santa Clara County for School Wellness Centers Initiative.
 - Provide opportunities for youth-led groups, forums, and activities.

Communications & Media Agreements

- During the course of the agreement, media opportunities may arise for the SCCOE, the Agency, and students, including the general student body, YAG members, or SWAG members. Media may be produced by the SCCOE; students participating in the YAG, SWAG, or school Wellness Center activities; or it may be produced by external organizations. This section outlines the agreements as it relates to media opportunities.
 - The Agency and SCCOE Wellness staff may recruit students to participate in media opportunities for the purposes of publicizing Office of Education programs, publicizing Office of Education partnerships, developing educational materials, or reporting on events of community interest.
 - The Agency and the SCCOE agree to notify each other of video marketing opportunities related to school-based Wellness Centers prior to production.
 - The SCCOE will ensure written consent by the parent/guardian will be obtained by the SCCOE or the organization producing the content for all students under 18 years of age in advance of production.
 - The Agency and the SCCOE agree that production may occur on campus during the instructional day at mutually agreed upon times.
 - The Agency and the SCCOE agree that production occurring on or off the school site outside of the instructional day requires only caregiver/parent consent.
 - The SCCOE agrees to provide the Agency an opportunity to preview any SCCOE video production related to Wellness Centers it produces prior to public release.
 - The Agency and the SCCOE agree and understand that media production developed by parties external to this agreement may not be previewed prior to public release.

3.4. Delivery of Services and Use of Resources:

- The Wellness Center will remain open during school hours, Monday through Friday, at minimum.
- Hours of operation may be expanded upon at the discretion of the SCCOE, based on funding and capacity. If hours of operation are expanded, the SCCOE will provide a revised Wellness Center schedule to the Agency.
- The Wellness Center will open on the first day of school and will remain open until the last day of school, at minimum.

- Extension beyond the school year is possible, pending funding and written agreement between the Agency and the SCCOE.
- Wellness Center services and supports are intended to be provided in-person on campus, though they may need to be provided remotely, depending on the continued impact of the pandemic and/or any school closures. Any adjustments shall be made at the discretion of the SCCOE.

4. Duration of Agreement

This agreement starts on July 1, 2025 of this agreement and ends on June 30, 2026; subject to change based on funding availability.

5. Articulation of Monies/Compensation

This Agreement is contingent upon the appropriation of sufficient funding by SCCOE for the services covered by this Agreement. If funding is reduced or deleted by CCSPP Implementation Cohort 1 for the services covered by this Agreement, SCCOE has the option to either terminate this Agreement with no liability occurring to SCCOE or to offer an amendment to this Agreement indicating the reduced amount and/or services.

5.1 Cost Sharing

Qualifying Entities are required to provide a local match equal to one-third (33 percent) of the CCSPP grant amount. The local match shall be contributed in cash or as a services/resources of comparable value, as determined by the California Department of Education. The cost sharing form must be completed upon execution of the MOU and for grant reporting purposes. The cost sharing total amount for CCSPP Cohort 1 shall be \$82,500.00 for the duration of the one school year.

6. Data Sharing

6.1. Data Collection:

The Agency

- The Agency will collect Tier 1, Tier 2, and Tier 3 personally identifiable (PII) and de-identified data for the purposes of program evaluation and grant reporting. The Agency may elect to utilize SCCOE's forms and tools for data collection, or they may elect to use their own forms and tools.
 - If the Agency elects to use its own forms and tools, the Agency will collect the following data elements: Referral Reason, Organization, Program, Tier, Coordinator Services, Referred By, Status, Date Initiated, Date Referred, Service, Close Date, Event Type, Location, SSID, Grade, District, Gender, Age, SPED, Ethnicity, SED, FY, Migrant, School, Student Date of Birth (Age), Student Last Name, First Initial, Date and Time of Service, District ID Number.
 - If the Agency elects to use its own forms and tools, the Agency will also provide a Calming Space
 - Survey to each student who visits the calming space, to be completed prior to exiting. Required data elements for the calming space survey include, but are not limited to: District Student Number; Student Last Name, Student First Name; Date of Birth; Grade; School Site; The Wellness Center helped me (yes/maybe/no), How were you feeling when you came in to the Wellness Center today?; How are you feeling now?; I want to come back to the Wellness Center (yes/maybe/no); How long were you at the Wellness Center today?; Is there anything you would like to say about the Wellness Center or for the Wellness Center Staff to know? The Agency's response options for the survey questions will be consistent with the options available on the

spreadsheet template provided by the SCCOE for the purposes of grant reporting.

- The Agency will submit Calming Space Survey data, Tier 2 data, and Tier 3 data to the SCCOE in a spreadsheet template.
- The Agency may be asked to administer a Social Emotional Learning (SEL) survey to all students in grades 3 and above. If requested, and if the Agency is not currently administering a SEL survey, the Agency agrees to administer SCCOE's DataZone SEL Survey questions.
- The Agency agrees to distribute the SCCOE Wellness Center Program feedback survey to students, caregivers, and teachers/administrators via hard copy forms and/or electronically (i.e., through the Agencies established e-communication channels, such as listservs) and shall report aggregated results back to the SCCOE on a yearly basis.
- The Agency will collect student insurance information. This data will be collected in preparation for the upcoming policy changes that will allow schools to bill Medi-Cal, Managed Care Plans, and Commercial Health Plans.
- The Agency will transfer all information to SCCOE in a secure manner; SCCOE staff will provide further directions to the Agency on how to do this.

The SCCOE:

- The SCCOE will collect and store personally identifiable (PII) student data in relation to Tier 1, Tier 2, and Tier 3 services and/or supports provided by the Wellness Center, as well as student data extracted from the DataZone Data Warehouse, in the SCCOE's Electronic Health Record (EHR) System (i.e., Welligent), in accordance with state and federal regulations. SCCOE site staff will only have access to records for students that are at their site. SCCOE Wellness Team (leadership) will have access to all records stored in Welligent.
 - Data elements collected by SCCOE staff include: Referral Reason, Organization, Program, Tier, Coordinator Services, Referred By, Status, Date Initiated, Date Referred, Service, Close Date, Event Type, Location.
- The SCCOE will collect and store personally identifiable (PII) student feedback data in relation to visits at the Wellness Center's Calming Space for the purposes of understanding student satisfaction and impact on mood. Data elements may include: SSID; District Student Number; Student Last Name, Student First Initial; Date of Birth; Grade; School Site; The Wellness Center helped me (yes/maybe/no), How were you feeling when you came into the Wellness Center today?; How are you feeling now?; I want to come back to the Wellness Center (yes/maybe/no); How long were you at the Wellness Center today?; Is there anything you would like to say about the Wellness Center or for the Wellness Center Staff to know?
- The SCCOE will distribute and collect feedback surveys for events, activities, and professional development opportunities provided by the SCCOE staff and its contracted providers.

6.2. Data Sharing

- The SCCOE and the Agency will adhere to legal and ethical data management practices in relation to privacy and security.
- The Agency will share data collected with the SCCOE, using templates or data file formats approved by the SCCOE on a basis consistent with grant reporting requirements.
- Both parties will provide an aggregate report of the data collected to each other on a semesterly basis.
- The SCCOE and the Agency, with additional data sharing agreements, may develop file extracts that allow the Agency to pull Wellness Center data obtained by the SCCOE into the Agency's Student Information System (SIS) and the SCCOE to pull Wellness Center data obtained by the Agency into Welligent, Service

Link App (SLS App), or DataZone Data Warehouse.

- The Agency agrees to share data collected or stored in the Data Warehouse and the SLS App, including personally identifiable (PII) student data and/or de-identified student data, with the SCCOE Research and Evaluation Team for the purposes of program evaluation and development of aggregated reports examining the correlations between school Wellness Center services and educational indicators including: Attendance, Grades, Suspension, Drop Out, Test Scores.
- The Agency agrees to the SCCOE sharing any data elements mentioned in this agreement with federal, state, and local funders based on the grant or funding agreement.
 - The SCCOE will provide an opt out option to students and caregivers in the SCCOE Consent Form.
 - The SCCOE will track students who opt out in Welligent.
 - The SCCOE will omit data for students who have opted out in the reports it provides to federal, state, and local funders.
 - The SCCOE may share data with agencies, including but not limited to: The Mental Health Services Act Oversight Commission, the California Department of Education, Managed Care Plans.
 - Data shared may be personally identifiable (PII) student data and/or de-identified student data, depending on grant or funding agreements.
- The Agency grants permission to the SCCOE to access and/or use personally identifiable (PII) student data stored in the SCCOE DataZone Data Warehouse and School Linked Services App for the following purposes:
 - An extract from the Data Warehouse to be loaded into Welligent (and reside on Welligent's server) for all currently enrolled students, with daily updates for added/dropped students. This will be done to ensure data quality (e.g., input errors or lack of knowledge of student ID), and to support coordination of care. Data elements sourced from the SCCOE Data Warehouse include: SSID, First Name, Last Name, Grade, District, Gender, Age, SPED, Ethnicity, Race, SED, FY, Migrant, English Language Status, Enrollment Start Date, Enrollment End Date, Attendance (%), Course Schedule, Graduation Status, Homeless Program, Parents Name, District ID #, Student Date of Birth, Student Mailing Address, Primary Language, School District, School Site, Suspensions, Expulsions, Drop out rates.
 - The Agency will grant permission to the SCCOE to access and/or use personally identifiable (PII) and de-identified student data stored within the School Linked Services App for the purposes of program evaluation and/or grant reporting. Data elements include: Referral Reason, Organization, Program, Tier, Coordinator Services, Referred By, Status, Date Initiated, Date Referred, Service, Close Date, Event Type, Location, Health Insurance, Sexual Orientation. The SCCOE will implement role permissions to ensure that the level of PII data to SCCOE is limited to what is needed for completion of their roles and responsibilities. The following access will be provided:
 - Mental Health & Wellness Specialist/ Wellness Center Liaisons - Will have access to PII services data and records for students they directly serve and access to educational records to all students at the sites they serve.
 - Director - Youth Health and Wellness, Coordinators- Social Emotional Wellness, and Managers - Social Emotional Wellness will have access to PII data for all students receiving services by staff under their direct supervision and all educational data at the sites served.
 - Senior Research Analysts assigned to prepare and submit reports and conduct program evaluation will have access to PII data for all students. PII data will not be linked with clinical records of students served through the Wellness Center.

7. Termination

Either the Agency or the SCCOE may terminate this Agreement with or without cause upon a ninety (90) day advance written notice to the other Party. Upon termination, SCCOE Wellness staff will need at least ten (10) days specifically allocated to closing cases and connecting students and families with other providers.

8. Other Terms

- 8.1. **Entire Agreement:** This Agreement and its appendices and exhibits (if any) constitute the final, complete, and exclusive statement of the terms of the agreement between the Parties. It incorporates and supersedes all the agreements, covenants and understandings between the Parties concerning the subject matter hereof, and all such agreements, covenants and understandings have been merged into this Agreement. No prior or contemporaneous agreement or understanding, verbal or otherwise, of the Parties or their agents shall be valid or enforceable unless embodied in this Agreement.
- 8.2. **Amendments:** This Agreement may only be amended by a written instrument signed by the Parties.
- 8.3. **Severability:** Should any part of this Agreement between SCCOE and the Agency be held invalid, illegal, or unenforceable in any respect, such invalidity, illegality, or unenforceability shall not affect the validity of the remainder of the Agreement, which shall continue in full force and effect, provided that such remainder can, absent the excised portion, be reasonably interpreted to give the effect to the intentions of the parties.
- 8.4. **Third-Party Beneficiaries:** This Agreement does not, and is not intended to, confer any rights or remedies upon any person or entity other than the Parties.
- 8.5. **Assignment:** No assignment of this Agreement or of the rights and obligations hereunder shall be valid without the prior written consent of the other Party.
- 8.6. **Use of SCCOE Name and Logo for Commercial Purposes:** Agency shall not use the name or logo of SCCOE or reference any endorsement from SCCOE in any manner for any purpose, without the prior express written consent of SCCOE as provided by the SCCOE's authorized representative, or designee.
- 8.7. **Governing Law, Venue:** This Agreement has been executed and delivered in, and shall be construed and enforced in accordance with, the laws of the State of California. Proper venue for legal action regarding this Agreement shall be in Santa Clara County.

9. Insurance/Hold Harmless

- 9.1 **Insurance:** The SCCOE and the Agency shall maintain a certificate of insurance in the Business Office of each respective office.
- 9.2 **Indemnification:** Each Party will defend, indemnify, and hold the other Parties, their officers, employees, and agents harmless from and against any and all liability, loss, expense (including reasonable attorney's fees), or claims for injury or damages arising out of the performance of this Agreement but only in proportion to and to the extent such liability, loss, expense, attorney's fees, or claims for injury or damages are caused by or result from the negligent or intentional acts or omissions of the indemnifying party, its officers, employees, or agents.

10. Execution Authority

Each individual executing this Agreement on behalf of a Party represents that they are duly authorized to

execute and deliver this Agreement on the entity's behalf, including, as applicable, the Governing Board, Superintendent, Board of Directors, or Executive Director. This Agreement shall not be effective or binding unless it is in writing and approved by the SCCOE's authorized representative, or authorized designee, as evidenced by their signature as set forth in this Agreement.

11. Electronic Signatures/ Signatures

Unless otherwise prohibited by law or SCCOE policy, the Parties agree that an electronic copy of a signed contract, or an electronically signed contract, has the same force and legal effect as a contract executed with an original ink signature. The term "electronic copy of a signed contract" refers to a transmission by facsimile, electronic mail, or other electronic means of a copy of an original signed contract in a portable document or other format. The term "electronically signed contract" means a contract that is executed by applying an electronic signature using technology approved by SCCOE.

SCCOE:

By: _____
 Signature of Authorized SCCOE Official

Name: Dr. David Toston Sr.

Title: County Superintendent of Schools

Date: _____

Address: 1290 Ridder Park Drive
San Jose, CA 95139

Phone: (408) 453-6511

Email: dtoston@sccoe.org

Mountain View Whisman School District:

By: _____
 Signature of Authorized Agency Official

Name: Jeffery Baier

Title: Superintendent

Date: _____

Address: 1400 Montecito Ave.
Mountain View, CA 94043

Phone: (650) 526-3500

Email: jbaier@mvwsd.org

For Contracts Office/Risk Management use only:

RM#: _____

Date: _____

Signature: _____

Exhibit A

SCCOE & MARIANO CASTRO ELEMENTARY SCHOOL

WELLNESS CENTER IMPLEMENTATION GRANT INFORMATION

A1. Grant Name: California Community Schools Partnership Program Planning Grant (CCSPP) – Cohort 1

A2. Grant Period: July 1, 2022 to June 30, 2027

C3. Grant Total Award: \$1,187,500.00

- Year 1: \$250,000.00
- Year 2: \$250,000.00
- Year 3: \$250,000.00
- Year 4: \$250,000.00
- Year 5: \$187,500.00

Allowable Activities and Costs

Budgets for the use of implementation grant funds will be reviewed and scored as part of the application process. Generally, all expenditures must contribute to establishing new community school sites and/or expanding or continuing programs at any community school site(s) to improve student outcomes. Items deemed non-allowable, excessive, or inappropriate by the CDE will be eliminated and the budget adjusted accordingly. Budgets that include non-allowable, excessive, or inappropriate items will receive a lower score. Allowable expenditures may include, but are not limited to, the following:

Integrated Support Services

- Professional development, planning time, and staffing to discover, review, and plan to address student needs and learning loss related to the COVID-19 crisis, including through targeted instruction and intensive tutoring.
- Common planning time for teachers by school, grade, and/or subject area to develop a shared vision for what students should know and be able to do, and how to work with families and community partners.
- Professional development on and design of programs and strategies that promote positive behavioral interventions, restorative practices, and trauma-informed instructional approaches, including the creation of advisory systems that ensure students are well-known and supported.
- Development of leadership coaching and support to strengthen collaborative leadership amongst site administrators, teachers, families, students, and community partners.
- Professional development and support for school and LEA staff to implement coordinated and integrated strategies for student supports within and across schools and districts, such as a multi-tiered system of support, coordination of services team (COST), or other classroom and school day supports.

Family and Community Engagement

- Professional development and programmatic supports for teachers and staff on evidence-based strategies to develop trusting, inclusive, and collaborative relationships with families and community members.
- Professional development and staff time for building and strengthening connections between teachers, students, and families, such as culturally responsive engagement practices, strengths-based student-family-teacher conferences, virtual or in-person home visitation programs by school staff, and family engagement action teams.

Collaborative Leadership and Practices for Educators

- Funding for a comprehensive and collaborative assessment of school and community assets and needs.
- Training and planning meetings between personnel and partners, including counselors, teachers, families, students, health professionals, college faculty, governmental agencies, community service organizations, and businesses, to support program sustainability and build awareness in the region on the benefits of community schools.
- Funding for dedicated staff (including community school coordinators) to support and facilitate partnerships, and discover professional development opportunities to build capacity for collaborative education and community leadership structures and practices.
- Participation in and utilization of research programs and strategies that promote positive behavioral interventions, restorative practices, and trauma-informed instructional approaches.
- Professional development that builds the capacity of educators and administrators to effectively engage input and leadership from students, families, and community members in community school decision-making processes.
- Planning for collaboration time among educators to identify and develop plans for meeting student needs.

Expanded Learning Time and Opportunities

- Professional development to expand and enrich curriculum through deeper learning strategies such as project-based learning that connects to concerns and/or organizations.
- Stipends, planning time, and support for educators (including teachers, expanded learning program staff, and other community partners working at school sites) to plan expanded learning time activities, including enhanced coordination between school-day and expanded learning time programs and activities for after school and/or summer programming.
- For LEAs serving elementary school students, stipends, planning time, and support for educators (including teachers, childcare and early learning program staff, expanded learning program staff, and other community partners working at school sites) to plan early learning programs, including enhanced

coordination between K–12 educators and school staff, expanded learning time programs and activities, and childcare and early learning programs.

Non-allowable Activities and Costs

Funds provided under this grant may not be used to:

- Supplant existing services and funds;
- Provide sub-grants to members of the partnership or other agencies. This includes mini-grants, which are different than service contracts;
- Acquire equipment for administrative or personal use;
- Purchase furniture (e.g., bookcases, chairs, desks, file cabinets, tables);
- Purchase or lease facilities;
- Remodel facilities not directly related to accessibility to instruction or services;
- Purchase food services, refreshments, banquets, and meals—possible exceptions are allowed, with evidence that the provision of food is necessary to implement a programmatic intervention strategy or training event conducted beyond normal school hours or off site for students, staff, and/or parents;
- Purchase promotional favors, such as bumper stickers, pencils, pens, or t-shirts;
- Purchase items for personal gain, a benefit or advantage that relates to a particular person rather than to the program as a whole. (i.e. gift cards, stipends to families and students).
- Purchase subscriptions to journals, magazines, or other periodicals; and
- Travel outside of the United States or to banned states, as specified by state travel rules. California state law restricts the use of state general funds to pay for travel costs to states that have laws that discriminate based on sexual orientation, gender identity, and gender expression.¹

Administrative Indirect Cost Rate

An LEA must limit administrative indirect costs (overhead) to the rate approved by the CDE for the applicable fiscal year in which the funds are expended. The approved rates can be found on the CDE's Indirect Cost Rates web page at www.cde.ca.gov/fg/ac/ic/index.asp.

¹. Prohibition on State-Funded and State-Sponsored Travel to States with Discriminatory Laws (AB 1887). <https://oag.ca.gov/ab1887>.

Accountability

Performance Measures

To ensure the successful implementation of the CCSPP, implementation grantees are required to submit the following to the CDE:

- annual project expenditure reports;
- annual implementation plan updates and progress reports;
- annual sustainability plan updates (starting in year two);
- an end-of-project expenditure report; and
- an end-of-project report, including a sustainability plan.

These reports should detail demonstrated progress towards and improvements on (1) school-level outcome measures and (2) program outcome measures and identified goals. These must include any and all elements required by the CDE, as well as any locally-determined measures. The applicant shall commit to providing program and expenditure data to the CDE, as specified by the CDE, and participating in overall program evaluation.

Failure to submit required annual reports or demonstrate evidence that deliverables have been met, and/or failure to show progress towards identified program and/or school level outcome measures, may result in the loss and/or remittance of some or all awarded funds.

School-Level Outcome Measures

In order to prepare a report to the Legislature at the end of the grant period, the CDE has determined a set of common outcome measures that all grantees will be required to establish and report baseline and improvement data, which includes the following, disaggregated by school sites and student subgroups.

- School attendance rates
- Chronic absenteeism rates
- Middle school dropout rates
- High school dropout rates
- Proficiency scores, English Language Arts and Mathematics, if available
- High school graduation rates
- Pupil suspension rates
- Pupil expulsion rates
- Other locally determined measures

Program Outcome Measures

The long-term measure of success for the CCSPP is the establishment and expansion of learning supports, learning opportunities, community-rooted and culturally relevant instructional practices, positive and nurturing school climates, and strong partnerships that better serve the needs of students and families, resulting in improved student outcomes.

An assessment of programmatic impact should reflect the LEA's as well as the community school's (schools') strategic implementation priorities as determined by the community school leadership team(s) (a collaborative

body of educators, administrators, families, students, community and civic partners) and designed to measure progress using baseline assessment data of student outcomes and school quality. The assessment will help applicants make progress toward achieving goals and updating the community schools implementation plan(s).

This assessment of programmatic impact should examine the extent to which grantees plan to support and expand high-quality community school goals, to:

- **Effectively and meaningfully engage** students, teachers, families, and community partners;
- **Establish and expand partnerships**, supports, and services that intentionally address locally-defined needs;
- **Expand student-centered teaching practices and enrichment** opportunities during and out of school time;
- **Enhance positive, supportive, inclusive, and racially just school climates** through relationship building, positive behavioral supports, and restorative practices;
- **Demonstrate collaborative leadership and shared decision-making** (inclusive of students, families, teachers, site administrators, and community partners); and
- **Develop the systems and practices** necessary to maintain the positive outcomes of the CCSPP.

As the CDE is required to prepare a comprehensive report to the Governor and Legislature by December 31, 2025 and December 31, 2027, the items listed above may be addressed and collected from grantees by an external evaluator to help inform the report.

Program Deliverables

Grantees must meet program deliverables. Listed below are the deliverables:

- Annual Expenditure Reports
- Annual Implementation Plan Updates and Progress Reports
 - Pupil and school data disaggregated by applicable school sites and student subgroups, including comparisons to baseline data.
 - Pupil and school baseline and improvement data resulting from any needs assessment and asset mapping activities.
 - Progress report and summary of updates to the community schools implementation plans for the overall initiative and each of the schools involved in the project. The annual report includes a description and review of all activities and must include descriptions of the following:
 - Student, family, educator, and community partner engagement
 - Collaborative leadership and shared decision-making structure and process

- Student-centered teaching practices and enrichment
 - Supportive and inclusive school climate activities, including activities to strengthen relationship building, positive behavioral supports, and restorative practices
 - School(s) response to student and family needs including supports, services and related provider and cooperating agency partnerships
 - Annual public meeting(s) to share progress report(s) and summary of updates to community schools implementation plan(s) with the community including students, families, educators, and community partners at both the LEA and school level.
- Annual Sustainability Plan Updates, starting in Year 2
 - End-of-Project Expenditure Report
 - End-of-Project Report
 - Pupil and school data disaggregated by applicable school sites and student subgroups, including comparisons to baseline data.
 - Pupil and school baseline and improvement data resulting from any needs assessment and asset mapping activities.
 - Final progress report and summary of updates to the community schools implementation plans for the overall initiative and each of the schools involved in the project. The final report must include a description of all activities and must also include descriptions of the following:
 - Student, family, educator, and community partner engagement
 - Collaborative leadership and shared decision-making structure and process
 - Student-centered teaching practices and enrichment
 - Supportive and inclusive school climate activities, including activities to strengthen relationship building, positive behavioral supports, and restorative practices
 - School(s) response to student and family needs including supports, services and related provider and cooperating agency partnerships
 - Community schools initiative sustainability plan including a description of the role the LEA will play in coordinating and supporting the overall initiative, established service provider and cooperating agency partnerships, and identified ongoing funding sources.
 - Description of the community schools initiative data collection (including data sharing), and outcomes tracking, and continuous improvement system and processes.

Reporting Requirements

Date	Activity
May 2022	Grant Award Notification Letter Signed by Grantee and Received by the CDE
June 30, 2023	Annual Progress Report, Implementation Plan Update, and Expenditure Report Due
June 30, 2024	Annual Progress Report, Implementation Plan Update, initial Sustainability Plan, and Expenditure Report Due
June 30, 2025	Annual Progress Report, Implementation Plan Update, Sustainability Plan Update, and Expenditure Report Due
June 30, 2026	Annual Progress Report, Implementation Plan Update, Sustainability Plan Update, and Expenditure Report Due
June 30, 2027	End-of-Project Report (including Sustainability Plan) and Expenditure Report Due

Exhibit B

SANTA CLARA COUNTY OFFICE OF EDUCATION REPORTING TEMPLATE
CALIFORNIA COMMUNITY SCHOOLS PARTNERSHIP PROGRAM & WELLNESS CENTER

INSTRUCTIONS

Every grantee is required to complete an end-of-project and expenditure report. Reports should include the following:

- 1) **CCSPP Grantee Details** – Provide background information about the grant including the primary applicant and reporting to the local educational agency (LEA).
- 2) **CCSPP Activities** – Complete the CCSPP Activities table. Refer to your approved CCSPP application in identifying the original program activities and indicate any changes in program activities since the application. Report on the types of activities that have occurred over the grant period and the alignment of activities to identified goals.
- 3) **CCSPP Indicators** – Describe and provide data on CCSPP indicators relevant to each of the four community school pillars. Refer to your approved CCSPP application to identify indicators.
- 4) **CCSPP Narrative** – Provide a one to three paragraph narrative for each prompt.
- 5) **Expenditure Report** – Complete and submit the attached expenditure report.

The Four Pillars of Community Schools

The final performance report will ask you to reference the Four Pillars of Community Schools in several places throughout this form. The following description is from the California Department of Education's *Proposed California Community Schools Framework* available at: <https://www.cde.ca.gov/be/ag/ag/yr22/documents/jan22item02a1.docx>

Community schools are defined in statute as public schools with “**strong and intentional community partnerships ensuring pupil learning and whole child and family development,**” including the following features:

- **Integrated student supports**, which can support student success by meeting their academic, physical, social-emotional, and mental health needs. Statute defines this as including the “coordination of trauma-informed health, mental health, and social services.” Effectively supporting students also requires that students be well known so that they can be well served. *Site based wellness center
- **Family and community engagement**, which involves actively tapping the expertise and knowledge of family and community members to serve as true partners in supporting and educating students. Statute defines this as including “home visits, home-school collaboration, [and] culturally responsive community partnerships.” Learning opportunities for family members as well as structures and opportunities for shared leadership are other important elements of authentic family engagement.
- **Collaborative leadership and practices for educators and administrators** that establish a culture of professional learning, collective trust, and shared responsibility for outcomes in a manner that includes students, families, and community members. Statute defines this as including “professional development to transform school culture and climate that centers on pupil learning and supports mental and behavioral health, trauma-informed care, Social Emotional Learning [and] restorative justice.”
- **Extended learning time and opportunities** that include academic support, enrichment, and real-world learning opportunities (e.g., internships, project-based learning). Statute refers to these opportunities as both “extended learning” and “expanded learning” and defines them as including “before and after school care and summer programs.” Expanded learning opportunities

can also include tutoring and other learning support during school hours.

SECTION 1: CSSPP Grantee Details

1. Indicate the applicant/lead LEA.

Name: _____ CDS Code (14 digits): _____

2. The Report must be submitted by the CCSPP lead or an individual with district authority. Indicate who is submitting this report.

Name: _____ Title: _____

SECTION 2: CCSPP Activities

To make progress toward CCSPP goals, grantees may engage in diverse activities. For each potential activity below, please identify whether the activity was part of your CCSPP application in column 1. The numbers in parentheses indicate the column number.

For the activities that are part of your CCSPP grant (check box selected in column 1), **please indicate the alignment of the activities to the appropriate community school pillar(s) in columns 2-5.** More than one pillar can be aligned with a given activity. Please reference the California Department of Education's description of features of the Four Pillars of Community Schools on the following page.

Additionally, for the activities that are part of your CCSPP grant (check box selected in column 1), please check the box in column 6 if you engaged with or expanded partnerships during the grant period, check the box in column 7 if training or professional development in that area occurred during the grant period, and check the box in column 8 if implementation of programs and practices occurred during the grant period. If more than one of these types of activities have occurred, please check all that apply. If you did not engage with partnerships, provide training, or engage in implementation for a given activity during the grant period, please check the box in column 9. 4

Establish / maintain...	Part of CCSPP Grant (1)	Alignment to Pillars (check all that apply)				Status of Activity During Grant Period (check all that apply)			
		Integrated support services (2)	Family and community engagement (3)	Collaborative leadership and practices (4)	Expanded learning time and opportunities (5)	Engaged with or expanded partnerships (6)	Provided training / professional development (7)	Implemented programs or practices (8)	Did not conduct activity (9)
Career / technical education	☐	☐	☐	☐	☐	☐	☐	☐	☐
Case management (e.g., linkages to services, social work supports)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Culturally responsive practices	☐	☐	☐	☐	☐	☐	☐	☐	☐
Expanded learning time – After school	☐	☐	☐	☐	☐	☐	☐	☐	☐
Expanded learning time – Before school	☐	☐	☐	☐	☐	☐	☐	☐	☐
Expanded learning time – Distance school	☐	☐	☐	☐	☐	☐	☐	☐	☐
Expanded learning time – Summer school	☐	☐	☐	☐	☐	☐	☐	☐	☐
Family / community engagement activities	☐	☐	☐	☐	☐	☐	☐	☐	☐
Home visits / school-family communication	☐	☐	☐	☐	☐	☐	☐	☐	☐
Leadership development / teams (e.g., develop leadership team, hire coordinator)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Mental health / wellness services	☐	☐	☐	☐	☐	☐	☐	☐	☐
Multi-Tiered Systems of Support (MTSS)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Needs assessment	☐	☐	☐	☐	☐	☐	☐	☐	☐
Positive Behavior Interventions and Supports (PBIS)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Restorative practices or restorative justice models	☐	☐	☐	☐	☐	☐	☐	☐	☐
Social emotional learning	☐	☐	☐	☐	☐	☐	☐	☐	☐
Strategic planning	☐	☐	☐	☐	☐	☐	☐	☐	☐
Student centered teaching practices (e.g., project-based learning, universal design for learning)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Systems for collaboration / shared decision making	☐	☐	☐	☐	☐	☐	☐	☐	☐
Trauma-informed strategies	☐	☐	☐	☐	☐	☐	☐	☐	☐
Tutoring / Mentorship / Coaching for students	☐	☐	☐	☐	☐	☐	☐	☐	☐
Other: (specify)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Other: (specify)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Other: (specify)	☐	☐	☐	☐	☐	☐	☐	☐	☐

SECTION 3: CCSPP Indicators

CCSPP indicators are the performance and outcome measures you intended to use to assess the success of your CCSPP grant as articulated in your grant application. The following questions ask you to describe and provide data on your grant's indicators relevant to each community school pillar. Please refer to the activities table in Section 2 to inform which activities you designated as aligned to each pillar. Additionally, please refer to your CCSPP application to determine which indicators to report on. If a data source is pertinent to multiple pillars, please describe it once and refer back to where the indicator and data are provided for the subsequent pillars.

1. Please describe and provide data on the indicators related to your grant's goals and activities aligned with the Integrated Student Supports pillar.

For example, if your CCSPP application included indicators related to access to mental health services or increased community partnerships, please describe those indicators and provide applicable data (e.g., number of students receiving mental health services; number of partnerships).

2. Please describe and provide data on the indicators related to your grant's goals and activities aligned with the Family and Community Engagement pillar.

For example, if your CCSPP application included an indicator related to family engagement opportunities please describe the indicator and provide applicable data (e.g., number of family engagement opportunities; number of families served).

3. Please describe and provide data on the indicators related to your grant's goals and activities aligned with the Collaborative Leadership pillar.

For example, if your CCSPP application included an indicator related to the development of a MTSS working guide or professional development, please describe the indicator and provide applicable data (e.g., copy of the MTSS working guide; number of professional development opportunities offered to teachers and staff).

4. Please describe and provide data on the indicators related to your grant's goals and activities aligned with the Extended Learning Time and Opportunities pillar.

For example, if your CCSPP application included an indicator related to having an increased number of students attending an expanded learning program, please describe the indicator and provide applicable data. (e.g., number of students attending the expanded learning program).

SECTION 4: CCSPP Program Narrative

For each prompt below provide a one to three paragraph narrative.

A. Provide a summary of how CCSPP funding and associated activities (Wellness Center) aligns with and compliments your LEA's LCAP.

B. Overall, what have been the biggest successes of your CCSPP grant this quarter?

C. Overall, what have been the biggest challenges of your CCSPP grant this quarter?

D. To inform the improvement of the CCSPP grant program and inform future technical assistance priorities, please provide an overview of the most impeding hurdles and obstacles during the implementation of the CCSPP grant and/or the implementation of the community school and/or wellness center.

SECTION 5: CCSPP Expenditure Report

AGENCY:				
SCCOE - CCSPP Cohort 1 Wellness Programs				
Qtr:				
Dates:				
Category	Description	Beginning Balance	Expense Total this Quarter	Remaining Balance

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

Vendor Name:

***REQUIRED CHECKBOX* for Service Contracts**

County Office will use their MOU in lieu of MVWSD PSA

- ☐ **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.

☐ 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

Approval by Department Head (Minimum: Manager Level)	Approval by Person with Delegated Authority (Superintendent, CBO, Assoc. / Asst. Superintendent)
Signature: _____	Signature: _____
Date: _____ July 8, 20____	Date: _____ July 8, 20____
Print Name: _____	Print Name: _____
Print Title: _____	Print Title: _____
For Department:	

Checklist not required for school sites