

**STANDARD OPERATING PROCEDURES
For Contracts \$5,000 - \$75,000
Request for Proposals/Qualifications/Applications**

1. Program office must contact Grants Management and/or Budget for available funds.
2. Program office shall visit the Procurement webpage for Bid Checklist and Forms for the appropriate solicitation to advertise.
 - ✓ Contract worker – Request for Applications (RFA)
 - ✓ Independent Contract – Request for Qualifications/Proposals (RFQ/P)
 - i. Application – request for contractual employees
 - ✓ Contract Worker Rate of Pay Determination
 - ii. Proposals – request for vendors to submit proposal for a project.
 - iii. Qualifications – request for vendors to submit qualifications to be considered for a project.
3. Program office shall complete Submission Form.
 - ✓ Chief approves the advertisement
4. Program office shall review the Timeline for Submission of Contracts.
5. Program office shall complete the Tentative Timeline Checklist.
6. Program office shall complete the appropriate RFP/Q/A template.
7. Program office shall complete the Facilitator Agreement.
8. Program office shall obtain dates from the timeline checklist to complete the RFP/Q/A (keep in mind the dates are tentative as Procurement shall revise the document dates according to Procurement's work volume).
9. Program office shall complete a draft contract for the contractor.
 - ✓ Review scope of work, end date, renewal clauses, etc.
10. Program office shall complete rubric.
 - ✓ Mirror RFP/Q/A
11. Program office shall submit the RFP/Q/A packet to procurement for review.
12. RFP/Q/A packet is reviewed by the Contract Analyst, Procurement Director and Compliance Officer.

13. Contract Analyst shall email an Information Request Checklist for revisions required.
14. Program office designee makes necessary revisions and returns documents to the Office of Procurement.
15. Contract Analyst shall contact OTSS for advertisement.
 - ✓ Count 14 business days after the advertisement date.
16. Program office shall pick up responses (next day) after due date.
17. Program office shall conduct a specifications review (complete Not Evaluated Form).
18. Program office shall review each response to make certain specifications are met. If specifications are not met, then the program office must complete the Proposal/Application Not Evaluated Form and submit to the Procurement Director PRIOR to the evaluation for verification and approval of rejection(s).
19. Evaluation team must complete the following form and evaluate based on criterion:
 - ✓ Evaluator Guidelines
 - ✓ Conflict of Interest Form
 - ✓ Statement of Confidentiality
 - ✓ Evaluator Sign-In
 - ✓ End of Review
20. Program office must complete the following forms:
 - ✓ Complete the Evaluator Factor Scoring Sheet
 - ✓ Vendor Score Sheet (tally)
 - ✓ List of contractors ranked highest to lowest
21. Program office shall submit evaluators scores and forms above (#19 & #20) to the Office of Procurement for verification and validation of scores.
22. Procurement Director shall validate evaluators scores and return packet to program office.
23. Program office shall complete the list of providers letter and send to each respondent.
24. Program office shall complete forms below for each contractor to be hired for work on the list of providers, ranked highest to lowest:
 - ✓ Justification
 - i. Chief approves the amount of contract(s)
 - ii. OTSS review for ITS related services

iii. Program evaluation review

For Independent Workers:

- ✓ IRS checklist
- ✓ Vendor contract
- ✓ W-9
- ✓ Debarment Verification Form
- ✓ Requisition
- ✓ Certification of PERS Form
- ✓ Employee vs. IC Determination (for retiree)
- ✓ Complete Board Item, if required

For Contract Workers:

- ✓ IRS Checklist
- ✓ Contract Worker Performance Review Form
- ✓ W-4
- ✓ State Withholding Form
- ✓ Certification of PERS Form
- ✓ PERS Form 4-B
- ✓ Background Acknowledgement and Authorization to Release Information
- ✓ Certification of School District/Public Entity
- ✓ Form I-9

25. Program office shall submit contract packet(s) to procurement for review.
(Please refer to the Office of Procurement Timeline for Submission of Contracts to meet deadlines.)
26. The Contract Analyst, Procurement Director and Compliance Officer shall review the contract packet for compliance.
27. Contract Analyst shall email documents to the program office for revisions, if needed.
28. Upon receipt of revisions from the program office, the Contract Analyst shall review requested revisions and forward packet to the Procurement Director, and Compliance Office for signatures.
- ❖ (Proceed to step 27 below if contract is \$50,000 or more)**
29. Contract Analyst shall email the program office the justification and a request for final signatures to the program office designee.
30. Program office shall contact contractor for MAGIC registration or update.

31. Program office submits final contract with executive signatures to the Procurement Office.
32. Contract Analyst reviews and submits contract to Procurement Director for review.
33. Procurement Director compares the contract to previously approved contract then signs.
34. Contractor begins work.

❖ For SBE Board Item Approval – (\$50,000 and above)

27. Upon receipt of revisions from the program office, the Contract Analyst shall review requested revisions and forward packet and the Procurement Transmittal form to the Procurement Director, Compliance Office and Chief of Operations for signatures.
28. The Contract Analyst shall email the Procurement Transmittal form to the program office designee and Superintendent's Office for SBE agenda placement.
29. Program office designee submits item to the Office of the Chief for board book placement.
30. Contract Analyst places the contract packet in a pending file until SBE approval.
31. Contract Analyst shall email the program office the justification and a request for final signatures after SBE approval.
32. Program office shall contact contractor for MAGIC registration or update.
33. Program office submits final contract with executive signatures to the Procurement Office.
34. Contract Analyst reviews and submits contract to Procurement Director for review.
35. Procurement Director compares the contract to previously approved contract then signs.
36. Contractor begins work.