



## Checklist for Purchase Requisition Document Attachments (Non-Federal Funds)

\_\_\_ Purchases up to \$5,000.00:

- Quote from selected vendor.

\_\_\_ Purchases \$5,000.01 – \$20,000.00:

- Three Quotes. Quotes must be for similar items / services to be comparable.

PLEASE NOTE: Other avenues of purchasing may be available if three quotes cannot be obtained (i.e. cooperative agreement). Please work with Purchasing.

\_\_\_ Purchases exceeding \$20,000.00 – items must be procured via a formal bid or Request for Proposal (RFP).

- Quote referencing contract being utilized.
- Debarment Form. May request form from Purchasing Department to send to vendor.

PLEASE NOTE: Other avenues of purchasing may be available (i.e. cooperative agreement). Please work with Purchasing.

\_\_\_ Purchases of Professional Services up to \$5,000.00– executed Contract Services Form (CSF) with defined scope and deliverables, signed by Vendor, and Control Agent (i.e. Principal, Department Head). The following documents will need to accompany the req.:

- Proposal/Quote
- Certificate of Liability Insurance
- Background Check (if in direct contact with students without supervision)
- Applicable professional licenses

\_\_\_ Purchases of Professional Services \$5,000.01-\$60,000.00 – executed Contract Services Agreement (CSA) with defined scope and deliverables, signed by Vendor, Control Agent, Chief Financial Officer, and Purchasing Office. The following documents will need to accompany the req.:

- Proposals/Quotes
- Certificate of Liability Insurance. To include additional remarks schedule, name the district as additional insured, waiver of subrogation endorsement, completed operations endorsement etc.



- Background Check (if in direct contact with students without supervision)
- Applicable professional licenses
- Debarment Form (for services \$20,000.01 and above). You may request document from Purchasing Dept to send to vendor.

PLEASE NOTE: Procurement vehicle may need to be discussed with Purchasing.

\_\_\_ Purchases of Construction Services up to \$5,000.00

- Quote
- Certificate of Liability Insurance.

\_\_\_ Purchases of Construction Services Between \$5,000.01-\$20,000.00

- Three Quotes. Quotes must be for similar items / services to be comparable.
- Certificate of Liability Insurance. To include additional remarks schedule, name the district as additional insured, waiver of subrogation endorsement, completed operations endorsement etc.

PLEASE NOTE: Other avenues of purchasing may be available if three quotes cannot be obtained (i.e. cooperative agreement). Please work with Purchasing.

\_\_\_ Purchases of Construction Services exceeding \$20,000.00- items must be procured via a formal bid or Request for Proposal (RFP).

- Quote referencing contract being utilized.
- Certificate of Liability Insurance. To include additional remarks schedule, name the district as additional insured, waiver of subrogation endorsement, completed operations endorsement etc.
- Debarment Form to send to vendor.
- Signed project binder with up-to-date costs (if Capital Project).
- Signed MOU (if PSFA funding involved).

PLEASE NOTE: Other avenues of purchasing may be available. (i.e. cooperative agreement). Please work with Purchasing.

**\*Disclaimer: Some purchases may present unique situations (i.e. Architecture, Landscaping services, etc.). Please contact the Purchasing Department to discuss.**