CAPISTRANO UNIFIED SCHOOL DISTRICT
San Juan Capistrano, California

August 10, 2015

TO: Office Managers

FROM: Lynh N. Rust, Executive Director, Contracts & Purchasing

SUBJECT: **Purchasing Requisition/Order Procedure and Contracting Procedure**

Purchasing Website: **http://purchasing-capousd-ca.schoolloop.com/**

I. Purchasing Requisition/Order Procedure

   A. Public Contract Code Sections 20111 and 20651
      1. The purchase of equipment, materials or supplies to be furnished, sold or leased to the district.
      2. Services, except construction services.
      3. Repairs, including maintenance as defined in Public Contract Code section 20115, except for public projects as defined in Section 22002.

   B. Workflow/Process
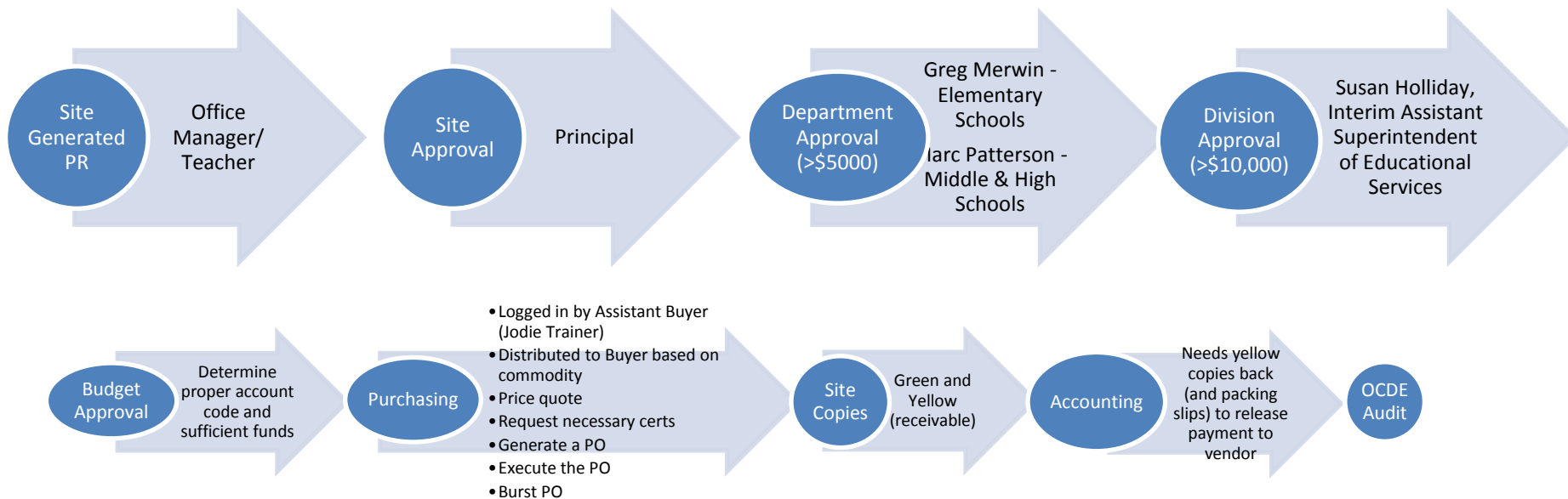
II. Contracting Procedure (for contractor services)

    A. General Info
- Contracts should be maintained by District Office (Contracts & Purchasing Department)
- Protects the District from liability (lawsuits)
- All agreements must be Board approved and only the Superintendent, Deputy Superintendent, Assistant Superintendents and Executive Director of Contracts & Purchasing should be signing agreements
- Follows same process as a Purchase Requisition/Order (Purchasing needs a fully approved purchase requisition to begin drafting a contract and bringing it to the Board for approval (see deadlines)

    B. Helpful tips:
- Give Purchasing department (Buyer/Planners) a heads up (name of vendor/contact rep)
- We can let you know if there is a current contract/agreement or if a new one is needed

    C. Examples of Documents that Purchasing Must Have for Contracts
- W-9 (revised Dec 2014)
- Conflict of Interest Certificate
- Tobacco-Free Workplace Policy
- Certification of Criminal Records Background Check
- TB Certification
- Fee Schedule
- Proof of Insurance

III.   Contact Us
    a. Checking the Status of a PR/PO
        i. Email Jodie Trainer at jmtrainer@capousd.org
        ii. Reference the PR number
    b. Checking the Status of a Contractor Agreement
        i. Email Buyer/Planners
    c. Any Problems/Delays/Concerns/Comments/Questions
        i. Email/call Lynh Rust