

Navigating the Vendor Process

Before you begin:

Plan Ahead – the entire process could take up to 10 weeks

A vendor/consultant needs to be qualified and approved if they will be on school grounds during school hours or have contact with students. You do not need to qualify a person/location that students will leave the school site to visit/tour. If you are unsure – ask!

Contact: Bruce Hagen bhagen@capousd.org

Are You Planning a Program that Requires a Qualified Vendor/Consultant?

Yes – continue

No – Skip to 4

1. Visit the CUSD Purchasing Department's website:
<http://www.capousd.org/purchasing/pdf/approvedconsultants.pdf>. to see if your intended vendor appears on the list. The link can also be found on the CUCPTSA website. The list is updated frequently.

Is Your Vendor Pre-Qualified?

Yes – Skip to 4

No – continue

The vendor will be required to carry insurance (\$200 - \$1,000 per year) and will be required to complete the Live Scan process (\$50 – one-time fee). To begin the qualifying process, the office manager at your school will need to complete a purchase requisition and you will need a copy of the (1) Proposal, (2) Fee Schedule (defined as the contract or agreement between your PTA unit and the vendor. It typically will contain the program date(s) and cost), and (3) Consultant Qualification Questionnaire (found on the Purchasing Department's website:

<http://www.capousd.org/purchasing/pdf/consultantqualificationquestionnaire.pdf> and completed by the unit president – sample attached as Exhibit A). The Purchasing Department will create a letter from the information on the Questionnaire and sent to the consultant to initiate the qualification process (Exhibit B). The vendor may need to be contacted by PTA so the following can be completed: fee schedule, information for Consultant Qualification Questionnaire and proposal if applicable. **The vendor does not complete the Consultant Qualification Questionnaire. This process could take up to 4 weeks.**

Did Your Vendor Complete the Qualifying Process?

Yes – Skip to 4

No – continue

1. If your vendor declined to be qualified or did not qualify for another reason, the Purchasing department will contact the office manager at your school. If this happens, you will need to choose another vendor.

Using a Qualified Vendor/ Submitting Payment

2. At the time you ask your unit's office manager to complete and submit a purchase requisition (that states "Consultant Agreement" – Exhibit C), you will need to establish when your unit should gift the funds to the school district. When the school district pays the vendor (according to the payment schedule that you list on the purchase requisition) they will take the money from the school's gift account. When you gift the money, make sure you submit a Fiduciary Agreement (signed by the unit president and treasurer and also the school principal) with the check (only for amount due per contract – do not prepay future payments). Some officer managers may request payment at the time they submit the purchase requisition, some may request payment after the vendor has been approved.

Purchase requisitions must be received by the Purchasing department and approved by the school board according to the following schedule:

Board Meeting Date	Date Requisitions are due to the Purchasing Department
Monday, July 21, 2008	Tuesday, June 17, 2008
Monday, August 11, 2008	Tuesday, July 8, 2008
Monday, September 8, 2008	Tuesday, August 5, 2008
Monday, October 6, 2008	Tuesday, September 2, 2008
Monday, November 3, 2008	Tuesday, September 30, 2008
Monday, December 8, 2008	Tuesday, November 4, 2008
Monday, January 12, 2009	Tuesday, November 25, 2008
Monday, February 9, 2009	Tuesday, January 6, 2009
Monday, March 9, 2009	Tuesday, February 3, 2009
Monday, April 13, 2009	Tuesday, March 10, 2009
Monday, May 11, 2009	Tuesday, April 7, 2009
Monday, June 8, 2009	Tuesday, May 12, 2009

All Consultant Agreements must be Board approved prior to when services to be provided.

When payment has been received and is ready for acceptance by the Board, Purchasing department will send the list to be approved to the CUCPTSA President to forward to the units. Make sure your vendor and payment appear on the list.

Once the purchase requisition has been approved by the Board, the Accounting department will pay the vendor for your program according to the instructions on the purchase requisition.

Remember:

The processing time at the DOJ is currently 60 days.

Plan Ahead! Qualify all of your known vendors as soon as the program has been approved by your Association.

The consultants should not be completing the Consultant Qualification Questionnaire.

The PTA presidents or office managers do not need to send anything to the consultants.

Once a vendor/consultant has been approved, any school can use them without going through the approval process again.

Exhibit A



CONSULTANT QUALIFICATION QUESTIONNAIRE

Consultant _____

Address _____

Telephone _____ Contact Name _____

Email _____ Website _____

Requisitioner _____ Date _____

Telephone _____ Email _____

School/Site _____

What services will the person or company provide for the District? _____

What is the frequency and duration of visits (number of hours and days per week, month or year)? _____

What is the degree of contact with students? _____

Will the consultant visit a school site (Y/N) _____ Transport students (Y/N) _____

Will the consultant drive or park on school property? (Y/N) _____

Will the consultant be in a classroom? (Y/N) _____

Will the consultant be paid? (Y/N) _____ Will animals be involved? (Y/N) _____

Requested Board approval date: _____ Date/s of service: _____

Comments _____

*Send this form to Bruce Hagen in Purchasing. bhagen@caposud.org Fax 949.493.4083
Purchasing will contact the applicant to assist them in the qualification process.*

Exhibit B



Capistrano Unified School District

Excellence in Education

33122 Valle Road, San Juan Capistrano, CA 92675

Telephone (949) 234-9441/FAX 493-4083

BOARD OF TRUSTEES

ELLEN M. ADDONIZIO
President

ANNA BRYSON
Vice President

LARRY J. CHRISTENEN
Clerk

MIKE DARNOLD

KEN MADDOX

SUE PALAZZO

DR. DUANE E. STIFF

SUPERINTENDENT

A. WOODROW CARTER

Date:

Consultant's name:

Address:

The Purchasing Department has been requested by _____ to begin the qualification process with your company to provide services to Capistrano Unified School District.

To comply with California State Law and District Policy, the following documents will be required to obtain Board approval for a Consultant Agreement with your company.

Documents required for each consultant may vary

- Live Scan (Background Investigation, allow 4-6 weeks for results)
- Certificate of Liability Insurance
- Evidence of Automobile Insurance
- IRS Form W-9
- TB Test Results
- List of Animals
- Fee Schedule

Instructions and forms for the above are located at:
www.capousd.org/purchasing (Information for Consultants link)

The documents must be received in our office by (Date), to be included on the agenda for the (Date) Board meeting.

Please feel free to contact me (preferably by email) if you have questions.

Regards,

Bruce Hagen
Purchasing Department
Capistrano Unified School District
33122 Valle Rd.
San Juan Capistrano, CA 92675
bhagen@capousd.org
T 949-234-9439
F 949-493-4083



Exhibit C



Capistrano Unified School District

PURCHASE REQUISITION	
PR 182001	
AA NO.	
P.O. NO.	
DATE PREPARED	

SUGGESTED VENDOR	VENDOR NO.
PHONE NO. ()	APPROVED VENDOR
STREET	STREET
CITY	CITY

SITE APPROVAL: <input type="checkbox"/>		ESTIMATE AMT.
BUYER	DATE NEEDED	SHIP TO: WAREHOUSE <input type="checkbox"/> IMC <input type="checkbox"/> SCHOOL/DEPT.
QUOTATION	DELIVERY DATE	OTHER: REQUISITIONER

F.O.B. SHIPPING PT.	F.O.B. DESTINATION	PURCHASING USE ONLY
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ITEM	QUAN/UNIT	MFG.'S NO. OR STOCK NO.	DESCRIPTION (Size, Color, Manufacturer, Etc.)	ESTIMATED UNIT COST	UNIT PRICE	AMOUNT
A			CONSULTANT AGREEMENT			
B			1. Detailed description of services			
C			2. Date/s of service			
D			3. Additional expenses			
E			4. Materials District needs to			
F			provide			
G						
H			5. REQUIRED ATTACHMENTS:			
J			Fee schedule, all signed documents,			
K			proposals, vendor agreements,			
L			exhibits			
M			6. List of animals			
N						
P			7. Requested Board approval date			
Q						

REVOLVING CASH FUND	PURPOSE-JUSTIFICATION	SUB-TOTAL
CK NO. _____ DATE _____		TAX
AMOUNT \$ _____		DEL EST
ACCOUNT CODE(S)		TOTAL