



BOND PROCUREMENT GUIDELINES

PROCUREMENT REQUIREMENTS

1. PURCHASE ORDER FOR GOODS & MATERIALS

STEPS	Details
1. Obtain Quote	<ul style="list-style-type: none"> District is NOT tax exempt. Deliver to District Warehouse, 4750 San Felipe Rd., San Jose CA 95135. Ensure all items on quote is bond allowable. Contact AKG if unsure.
2. Vendor	<ul style="list-style-type: none"> Vendor must accept District Purchase Order (no credit cards, no deposits or prepays). Under certain circumstances such as for pre-fabrication deposits – must be approved by Vice Chancellor of Administrative Services. District does not pay late fees on invoices. If Credit Application is required – forward to District Accounting with copy to Purchasing If new vendor – Obtain W9 & BEC – forward to Purchasing for new vendor setup.
3. Submit to Purchasing	<ul style="list-style-type: none"> Submit quote including tax & shipping. Description – What is it? What for? Bond Project Number. Contact Person – Who should warehouse contact upon delivery?
4. Purchasing	<ul style="list-style-type: none"> Will review & approve documents and forward to AKG for budget appropriation and requisition initiation. Upon approvals, Purchase Order generated and submitted by Purchasing to vendor, copying all parties involved.
PURCHASES THAT EXCEED BID THRESHOLD	
Option 1	Conduct a Public Competitive Bid <ul style="list-style-type: none"> Bid to be conducted by Purchasing. Bid must include option to evaluate alternate items.
Option 2	Utilize a Piggyback Contract or CMAS <ul style="list-style-type: none"> Consult Purchasing for approved Piggybacks or FCCC or CMAS that may be available. Ask vendor if they have a Piggyback or FCCC or CMAS available for their product. Piggyback Contracts must be board approved before use.

2. PURCHASE ORDER FOR SERVICES

STEPS	Details
1. Obtain 3 Quotes or Proposals	<ul style="list-style-type: none"> Solicit quotes from 3 qualified vendors. Include scope of work, schedule, qualifications, and a sample of the contract template in email requesting quotes. Receive, review, & compare quotes. Select one in best interests of District. Selected quote must include scope of work and basis of payment.
2. Submit to AVC Physical Plant Development & Operations for approval	<ul style="list-style-type: none"> Include 3 quotes, copy of solicitation email, analysis of quotes and rationale for recommendation with copy to Purchasing.
3. Prepare Contract & Obtain Vendor Signature	<ul style="list-style-type: none"> Refer to Contract Requirements for appropriate contract. Obtain Certificate of Insurance from Vendor. Refer to SJECCD Insurance Requirements for required coverages.

4. Submit to Purchasing	<u>Required Documents:</u> <ul style="list-style-type: none"> ✓ Contract signed by vendor ✓ Certificate of Insurance ✓ Quote or Proposal ✓ W-9 (on most recent IRS form, currently Oct-18) ✓ Business Enterprise Certification (BEC Form) ✓ Description – project number, project manager, brief description ✓ Attach approval email by AVC Physical Plant Development & Operations
5. Purchasing	<ul style="list-style-type: none"> • Will review and file COI. • Obtain approval by District Risk Manager and final District signature. • Set up new vendor if needed. • Submit to AKG for budget appropriation and requisition initiation. • Upon approvals, Purchase Order generated and submitted by Purchasing to vendor with fully executed contract, copying all parties involved.
PURCHASES THAT EXCEED BID THRESHOLD	
Option 1	REQUEST FOR PROPOSAL – Public Competitive RFP <ul style="list-style-type: none"> • Prepare POPP Form and calendar with Purchasing, copy Outreach Coordinator. • Purchasing to post 45-day notice to Future Opportunities on District website • Purchasing will conduct the solicitation.
Option 2	REQUEST FOR PROPOSAL – RFP by Invitation from Pre-Qualified Pool <ul style="list-style-type: none"> • Prepare POPP Form and calendar with Purchasing, copy Outreach Coordinator. • Purchasing will conduct the solicitation.
Option 3	Consider utilization of FCCC contract for goods or services if available.
Option 4	Consider utilization of Government Code 53060. Requires Legal advisement and VCAS Approval <ul style="list-style-type: none"> • Prepare POPP Form and calendar with Purchasing, copy Outreach Coordinator. • Purchasing to assist.

3. PURCHASE ORDER FOR PUBLIC WORKS < \$60,000

Steps	Details
1. Obtain 3 Quotes or Proposals	Solicit quotes from 3 qualified contractors. Include scope of work, schedule, qualifications, and a sample of the contract template in email requesting quotes. <ul style="list-style-type: none"> • Check CSLB license. • Check Prevailing Wage status • If job is >\$1,000 - must pay Prevailing Wage • If job is >\$25,000 - must pay Prevailing Wage, DIR registered, Payment & Performance Bonds required.
2. Submit to AVC Physical Plant Development & Operations for approval	<ul style="list-style-type: none"> • Include 3 quotes, copy of solicitation email, analysis of quotes and rationale for recommendation with copy to Purchasing.
3. Prepare Contract & Obtain Vendor Signature	<ul style="list-style-type: none"> • Use PWA Contract • Obtain Certificate of Insurance from Vendor. Refer to SJECCD Insurance Requirements for required coverages.
4. Submit to Purchasing	<u>Required Documents:</u> <ul style="list-style-type: none"> ✓ Contract signed by vendor ✓ Certificate of Insurance ✓ Quote or Proposal ✓ W-9 (on most recent IRS form, currently Oct-18) ✓ Business Enterprise Certification (BEC Form) ✓ Payment & Performance Bonds if job >\$25,000, must use District templates. Scanned copies are acceptable. ✓ Obtain PWC-100 number from AKG and file PWC-100 if > \$25,000 ✓ Description – project number, project manager, brief description ✓ Attach approval email by AVC Physical Plant Development & Operations
5. Purchasing	<ul style="list-style-type: none"> • Will review and file COI. • Obtain approval by District Risk Manager and final District signature. • Set up new vendor if needed. • Submit to AKG for budget appropriation and requisition initiation.

	<ul style="list-style-type: none"> Upon approvals, Purchase Order generated and submitted by Purchasing to vendor with fully executed contract, copying all parties involved.
PURCHASES THAT EXCEED BID THRESHOLD	Bid Threshold for Public Works is \$60,000.00
\$60,000.01 to \$200,000.00	<ul style="list-style-type: none"> Informal Bid Purchasing will conduct Bid
\$200,000.01 and above	<ul style="list-style-type: none"> Formal Bid Purchasing will conduct Bid
\$2,000,000.00 and above	<ul style="list-style-type: none"> Formal Bid with OCIP Purchasing will conduct Bid
\$3,500,000.00 and above	<ul style="list-style-type: none"> Formal Bid with OCIP and GC Prequalification Purchasing will conduct Bid

4. PROCESS FOR PUBLIC WORKS > \$60,000

Steps	Details
1. POPP Form	<ul style="list-style-type: none"> Prepare POPP Form and Calendar with Purchasing. Copy Outreach Coordinator Purchasing to post 45 day notice to Future Opportunities on District website
2. Conduct Bid	<ul style="list-style-type: none"> Purchasing and CM to conduct bid and identify lowest responsive and responsible bidder for award
3. Notice of Intent to Award	<ul style="list-style-type: none"> CM drafts NOIA to All Bidders and NOIA to Intended Awardee. Submits to Purchasing for release to Intended Awardee and all bidders. Intended Awardee to complete required procurement submittals
4. Notice of Award	<ul style="list-style-type: none"> CM drafts NOA. Submits to Purchasing for release to all bidders. Informal bids to be awarded by VCAS Formal bids to be awarded by Board of Trustees
5. Purchasing	<ul style="list-style-type: none"> Will review and file COI. Obtain approval by District Risk Manager and final District signature. Set up new vendor if needed. Submit to AKG for budget appropriation and requisition initiation. Upon approvals, Purchase Order generated and submitted by Purchasing to contractor with fully executed contract & PWC-100, copying all parties involved.

CONTRACT REQUIREMENTS

1. CONTRACTS FOR PUBLIC WORKS

Contract Form:	Used For:	Change Order Form:
PWA – Public Works Agreement	Public works projects less than \$60,000.00	Contract Amendment Form
Agreement (standard from bid documents)	Publicly bid public works jobs including Informal, Formal, with OCIP, and with Pre-Qualification of GCs.	Prime Contract Change Order
Agreement for Design Build Pre-Construction Services	Design Build delivery method -- Phase I pre-construction contract	Amendment to Agreement for Design Build Pre-Construction Services
Agreement for Design Build Services	Design Build delivery method -- Phase II construction contract	Amendment to Agreement for Design Build Services
Development Agreement	Lease-Leaseback delivery method -- Preconstruction	Amendment to Development Agreement
Facilities Agreement	Lease-Leaseback delivery method -- Construction	Amendment to Facilities Agreement
Site Lease Agreement	Lease-Leaseback delivery method	Amendment to Site Lease Agreement

2. CONTRACTS FOR SERVICES

Contract Form:	Used For:	Change Order Form:
PAA – Project Assignment Amendment	Contract derived from Master Agreement (i.e., architects)	PAA Revision form
PSA – Professional Services Agreement	Consultants	Contract Amendment Form
PIA – Project Inspector Agreement	Project Inspectors (DSA Certified IORs)	Contract Amendment Form
LOR – Laboratory of Record Agreement	Laboratory of Record (Special Testing & Inspection firms)	Contract Amendment Form
ICA – Independent Contractor Agreement	General services (i.e., furniture installation, moving services)	Independent Contractor Agreement Revision

3. PREVAILING WAGE AND CONSTRUCTION CAREERS AGREEMENT REQUIREMENTS

REQUIRED DURING CONSTRUCTION (NTP through NOC)

Public Works	Prevailing Wage IF >\$1,000	DIR Registration IF >\$25,000	PWC-100 IF > \$25,000	Construction Careers Agreement	Payment & Performance Bonds
PO less than \$60,000 or Informal Bid	Yes	Yes	Yes	No	Yes
Public Bids (Formal, OCIP, Pre-Qualification)	Yes	Yes	Yes	Yes	Yes
Negotiated PO after informal bid has no responses	Yes	Yes	Yes	No	Yes
Negotiated PO after formal bid has no responses	Yes	Yes	Yes	Yes	Yes
Design Build Pre-Construction	No	No	No	No	No
Design Build Construction	Yes	Yes	Yes	Yes	Yes
Lease-Leaseback Pre-Construction	No	No	No	No	No
Lease-Leaseback Construction	Yes	Yes	Yes	Yes	Yes
Lease-Leaseback Site Lease	No	No	No	No	No
Professional Services					
Land surveying	Yes	Yes	No	No	No
Geotech Services (depending on scope)*	Yes	Yes	Yes	Yes	No
Lab of Record (Special Testing & Inspection)	Yes	Yes	Yes	Yes	No
Project Inspector (IOR)	Yes	Yes	No	No	No
Furniture Installation (free standing or affixed)	Yes	Yes	Yes	No	No

* = Field labor on site is covered by CCA

INSURANCE REQUIREMENTS

	GENERAL REQUIREMENTS -- i.e., on-site training, other consultants	SPECIAL REQUIREMENTS PROFESSIONAL -- Architects, Engineers, CPAs, Lawyers.	GENERAL REQUIREMENTS PROFESSIONAL -- 1) Geotechs; 2) Inspectors of Record; 3) Special Testing & Inspection; 4) Industrial Hygiene; 5) LEED Consulting; 6) Commissioning; 7) Landscape Architects; 8) Surveyors; 9) other consultants who require prof. liability ins.	GENERAL REQUIREMENTS REGULAR CONSTRUCTION -- GCs for construction projects valued < \$2,000,000 and Subcontractors for work valued < \$2,000,000	GENERAL REQUIREMENTS CONSTRUCTION -- GCs for construction projects valued above \$2,000,000 to be covered by OCIP (SEWUP)
X = not required Type of Coverage					
Commercial General Liability Each Occurrence Aggregate	\$1,000,000 \$2,000,000	\$1,000,000 \$2,000,000	\$1,000,000 \$2,000,000	\$1,000,000 \$2,000,000	\$2,000,000 \$4,000,000
Commercial Automobile Liability Any Auto, Hired Autos, Non-Owned Autos Combined Single Limit	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$2,000,000
Umbrella Liability	X	X	X	X	X
Worker's Compensation Each Accident Disease – Each Employee Disease – Policy Limit	\$1,000,000 \$1,000,000 \$1,000,000	\$1,000,000 \$1,000,000 \$1,000,000	\$1,000,000 \$1,000,000 \$1,000,000	\$1,000,000 \$1,000,000 \$1,000,000	\$1,000,000 \$1,000,000 \$1,000,000
Professional Liability Each Occurrence Aggregate Deductible	X X X	\$2,000,000 \$4,000,000 \$75,000	\$1,000,000 \$2,000,000 \$75,000	X X X	X X X
Builder's Risk Coverage for total amount of construction contract	X	X	X	GC's Only Required for projects over \$250,000 only	Covered under OCIP Not required for demolition only work
Additional Insured District	required	required	required	required	required

NOTE: These insurance requirements may only be waived or adjusted on a case-by-case basis at the discretion of the San Jose Evergreen Community College District, by authority of the Contracts and Risk Manager or the Vice Chancellor of Administrative Services.

Description of Operations on Acord page must read:

“(Project number & Name) San Jose Evergreen Community College District, its trustees, officers, agents, employees, and volunteers, individually and collectively, are named as additional insureds on General Liability policy as per attached endorsement.”

Certificate Holder on Acord page must read: San Jose Evergreen Community College District, 40 South Market St. San Jose, CA 95113

An Endorsement Page referencing the policy number of the General Liability insurance must be attached to the Certificate of Insurance.

COI renewals shall be submitted via email to: insurance.certificates@sjeccd.edu