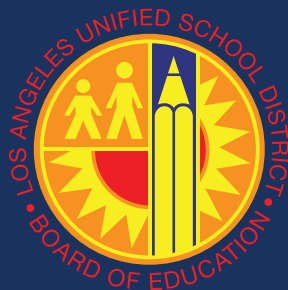


Los Angeles Unified School District
PROCUREMENT SERVICES DIVISION



**PROFESSIONAL SERVICES
CONTRACTS**

USER GUIDE

Rev. November 2018

Los Angeles Unified School District
Procurement Services Division
333 S. Beaudry Ave., 28th Floor
Los Angeles, CA 90017

Procurement Services Division (PSD) Mission Statement

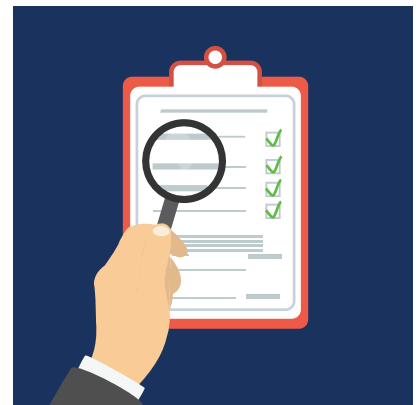
“To provide schools and administrative offices with goods and services they need - when they need them. In doing this, we must ensure procurement laws are followed and the District achieves the most cost-effective prices for goods and services.”

Professional Services Contracts - User Guide

This guide contains the official policies and procedures for procuring **professional services**. By adhering to the user guide, we ensure that professional services necessary for the operation of school sites and central operations are obtained at competitive prices in a manner that guarantees fairness in the selection of contractors and minimizes opportunities for fraud, waste and abuse.

These policies and procedures are consistent with applicable state and federal laws.

No purchases shall be made except as provided by applicable California Law, Federal Law, Board policies and these procedures for procurement of professional services. Only persons expressly authorized by Board policy or the Superintendent, via sub-delegation of authority, shall make any purchase or enter into any contract for the purchase of professional services on behalf of the District. **School Principals, Office Administrators, Heads of Organizations, and/or Senior Staff DO NOT have the authority to sign vendors' contracts.** Any purchase made, or contract entered into, in violation of the policies and procedures contained herein are void and not binding on the District. Those individuals who violate these policies and procedures and engage in malfeasance shall be personally liable for such actions.



Schools and offices must follow the policies and procedures of the District. Procurement is available to assist you in following good business practices during the procurement process.

District policy requires that all professional services contracts in excess of \$25,000 be competed in order to ensure that interested vendors are given an opportunity to submit a proposal and to obtain fair pricing. This guide will describe the processes to follow and list documentation and/or approvals required when submitting your request to Procurement for processing. It is recommended that professional services purchase orders below \$25,000 be competed to ensure the best value.



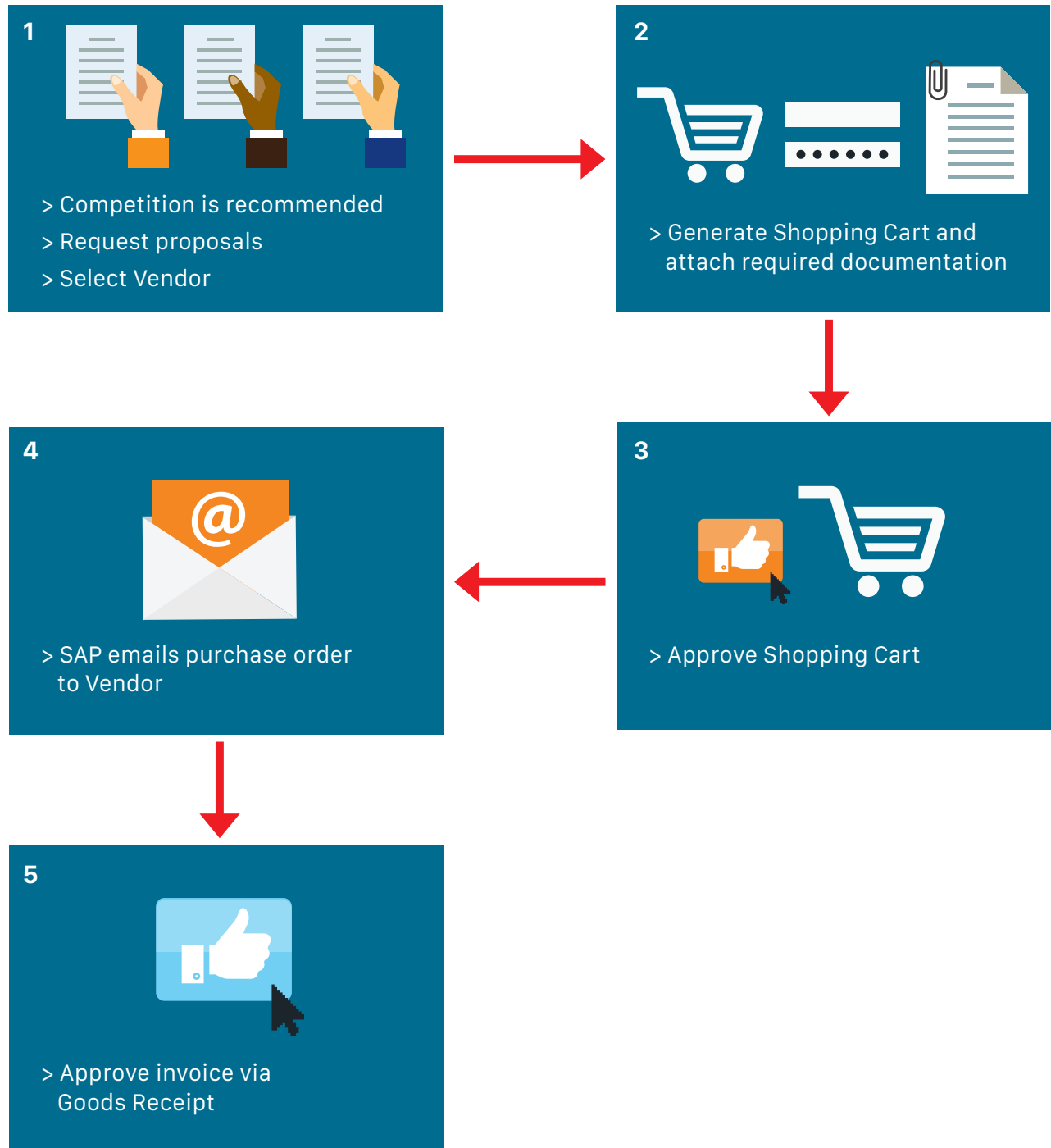
REMINDER: School Principals, Office Administrators, Heads of Organizations, and/or Senior Staff DO NOT have the authority to sign vendors' contracts.

A close-up photograph of a person's hands writing in a spiral-bound notebook. The person is holding a silver pen in their right hand and writing on a white page. Their left hand is resting on the notebook. The background is blurred, showing a light-colored surface. A dark blue horizontal band is overlaid across the middle of the image, containing white text.

\$1 UP TO \$25,000

PROFESSIONAL SERVICES CONTRACTS \$1.00 UP TO \$25,000

(Processing time - approximately 10 working days)



REMINDER: Professional Services up to \$25,000 require a Purchase Order **only**.
A formal contract is not required.

PROFESSIONAL SERVICES CONTRACTS \$1.00 UP TO \$25,000

The **decentralized process** authorizes the Principals, Site Administrators, or Heads of Organizations to issue a purchase order for the procurement of professional services up to \$25,000.

To ensure the best value, it is recommended that at least three (3) vendors be contacted to provide a written proposal for the desired professional services.

Proposal documentation should be kept on file at your site and include the following:

- a. Vendor name
- b. Contact person and phone number
- c. Description of services
- d. Total cost
- e. Date(s), time and location where services are to be performed.



Notify vendor that payments will be processed within 45 days from receipt of materials or completion of services and approval of an invoice. Ensure selected vendor has a District vendor number. To obtain a vendor number, please direct the vendor to the Procurement Services Division website for self-registration.


Once proposals have been evaluated and a vendor has been selected, you may generate a purchase order as follows:

1. Generate a shopping cart with appropriate funding. (SAA or designated staff)
 - It is recommended that all supporting documentation be attached to the shopping cart for future reference and/or auditing purposes.
2. Approve Shopping Cart (Principal, Site Administrator, or Head of Organization)
3. Upon approval of a shopping cart, the system (**SAP**) will automatically generate a purchase order and email it to the vendor authorizing the services.

Since a purchase order represents an agreement between you (school/office) and a specific vendor, no contract needs to be signed. You are responsible for all arrangements for the vendor's performance. However, very specific terms and conditions may be required for certain specialized services, such as complex information technology services, and certain health-related services.

The vendor is obligated to perform the services according to the terms specified on the quotation. Therefore, it is important to ensure the quotation includes any specific arrangements to which the vendor has agreed.

4. After the vendor performs to your satisfaction, you must acknowledge receipt of the services and complete a Goods Receipt (GR) via the SAP system. For assistance in processing your Goods Receipts, please contact your LD Representative in the Shopping Cart Support Center. The Accounts Payable Branch cannot process payment to the vendor unless a GR has been created.

 **REMINDER:** School Principals, Office Administrators, Heads of Organizations, and/or Senior Staff DO NOT have the authority to sign vendors' contracts.

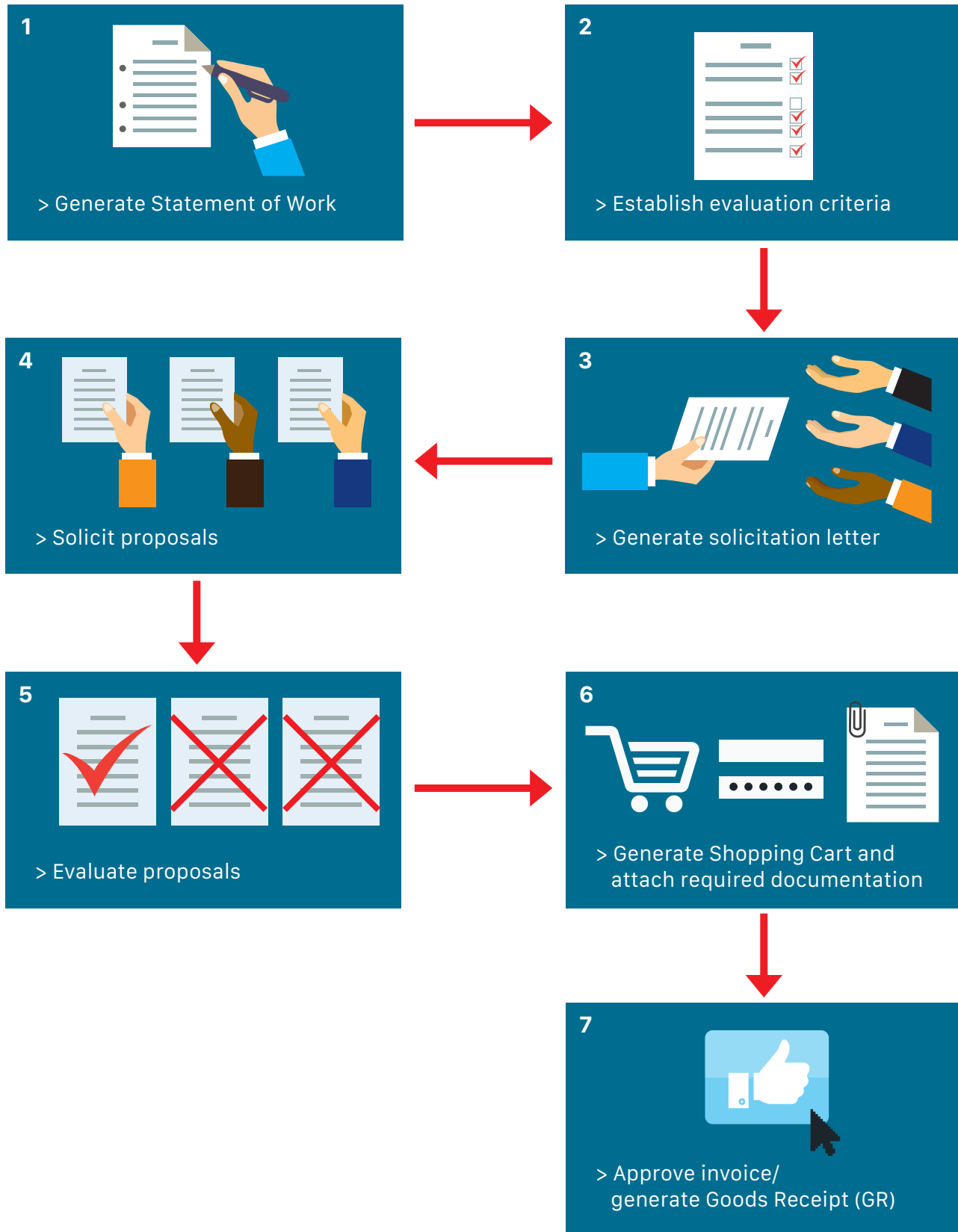


\$25,001 UP TO \$250,000

PROFESSIONAL SERVICES CONTRACTS
\$25,001 UP TO \$250,000

INFORMAL REQUEST FOR PROPOSAL PROCESS

(Processing time - minimum 30 working days)



PROFESSIONAL SERVICES CONTRACTS \$25,001 UP TO \$250,000

BACKGROUND

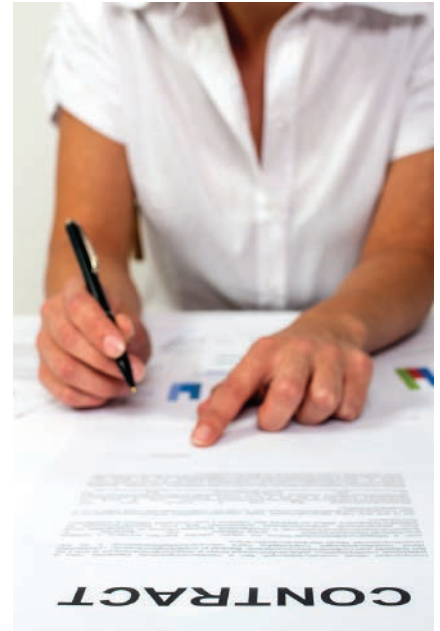
District Policy requires that professional services \$25,001 up to \$250,000 be competed. An Informal Request for Proposal (IRFP) must be conducted. The IRFP process is conducted by the requesting school/office.

INFORMAL REQUEST FOR PROPOSAL PROCESS:

- It is **required that at least three (3) vendors be contacted** (including Small Business Enterprise and Disabled Veteran Business Enterprise, if possible) to provide written proposals for the desired services.
- You may use the internet, past vendor history, or contact LD or Central Office Representative in Procurement to identify vendors that provide the services required.

The IRFP process requires the following documentation be generated by the requesting department:

- A. Statement of Work (SOW)
- B. Evaluation Criteria
- C. Solicitation Letter



STEP ONE - GENERATE THE STATEMENT OF WORK

The elements of a Statement of Work (SOW) can vary with the objective, complexity, size, and nature of the work to be performed. A SOW should be drafted in clear, simple, and concise statements. There should never be a question as to what work is to be completed, or what the contractor is obligated to do - nothing should be implied. Requirements should be clearly stated to easily determine compliance to the contract. All requirements should be described in sufficient detail to assure clarity. Every effort should be made to avoid being ambiguous.

NOTE: Using a vendor supplied SOW will prevent that vendor from proposing.

A SOW is unique for each procurement, but usually consists of some or all of the following:

1. A general statement of the scope or extent of the work to be performed;
2. The period of performance of the work;
3. The place for performance of the work;
4. Reference documents, procedures, or specifications governing the work to be performed;
5. The specific work requirements:
 - a. A detailed statement of the purpose, objective or goals to be undertaken by the vendor,
 - b. The job classification or approximate skill level of the personnel to be made available by the vendor,
 - c. An identification of all significant data deliverables and material to be developed by the vendor and delivered to the District,
 - d. An identification of all significant data or materials to be delivered by the District to the vendor,
 - e. An estimated time schedule for the provisioning of these services by the vendor,
 - f. Completion and acceptance criteria for the work to be performed;

- 6. Management or administrative requirements of the work;
- 7. Compliance or progress reporting requirements; and
- 8. Completion or close-out requirements.

STEP TWO - ESTABLISH EVALUATION CRITERIA

The **evaluation criteria** will provide the proposers information on how and what areas will be evaluated and scored.

Examples:

A. Minimum Qualifications:

- Number of years the firm must have experience in providing the requested services.
Example: Proposing firm shall possess a minimum of 2 years experience in the design and delivery of professional development for mathematics teachers.
- Minimum education of the proposed key personnel and number of years of experience.
Example:
 1. All trainers must have a minimum college degree of Master of Education,
 2. All trainers must have a minimum 5 years experience in mathematics training for K-12 public school teachers.

Those vendors meeting the desired minimum qualifications will then be scored as listed on the Evaluation Criteria.

B. Technical Evaluation

Typical areas for evaluation:

• Qualifications of the Firm:	<u>30</u>
• Personnel Qualifications and Experience:	<u>20</u>
• Course Content:	<u>20</u>
• Small Business Enterprise Participation	<u>5</u>
• Price:	<u>25</u>
100 points total	



C. Establish an impartial evaluation committee.

D. Basis of Award

Contract award will be made to the "highest scored" proposal, with the appropriate consideration given to the evaluation stated on the Evaluation Criteria. However, the District reserves the right to make an award to other than the low cost Proposer.

STEP THREE – DRAFTING THE SOLICITATION LETTER

The Solicitation Letter should provide the following information:

- Brief description of services
(*Example: Professional development at ABC High School for teachers of Mathematics for grades 8 through 12*)
- Period of Performance
(*Start and end date of services to be provided - Example: March 18, 2018 through April 17, 2018*)
- Place for performance of the work
(*Location of school or office - Example: ABC High School, Room __*)
- Proposals due date, time, and where proposals should be delivered. Provide proposers at minimum 10 working days to respond.
(*Example: Proposals due at ABC High School, Main Office, no later than 4:00 p.m., March 13, 2018*)
- Evaluation Criteria (see page 6)
- Basis of Award (see page 6)
- Vendor Proposal Submittal (see below)
- LAUSD contact person for information relating to the solicitation
(*Example: Name: Mr. Jones
 Department: Math Department
 Address: 111 S. First Street
 Los Angeles, CA 90001
 Phone: (213) 222-3333
 E-Mail: mjones@lausd.net*)

Vendor Proposal Submittal –

Describe in what format and how many copies of the proposals should be provided by the proposer. (*Example: Proposers shall submit an original hard copy and 5 copies on CD-Rom of a technical and price proposal.*) Some Informal Request for Proposals (IRFP) may be submitted electronically via e-mail if the file size is below 20 MB.

Also, describe what the proposals should include (e.g., resumés, reference information, a statement describing the vendors' qualifications, a statement explaining how the vendor would go about completing the work, etc.).

STEP FOUR - SOLICITING PROPOSALS

E-mail or fax the solicitation package to your potential vendors. The solicitation package should include:

1. Solicitation Letter
2. Statement of Work
3. Proposal Certification Form*
4. LAUSD Insurance Requirements*
5. Professional Services Terms and Conditions*
6. Contractor Code of Conduct*

*Copies of these documents can be found on the Procurement Services Division website at <https://achieve.lausd.net/Page/12529> (logon using your single sign-on). DO NOT revise these documents. Print and provide a copy of the documents as part of the solicitation package.

STEP FIVE - EVALUATION OF PROPOSALS

An evaluation committee of at least three (3) individuals should be appointed to evaluate the proposals received.

Once the evaluation process has been completed, fill out an Informal Request for Proposal (IRFP) checklist summarizing the evaluation of the proposals received, including "no-bid" replies, and instances where vendor contact was attempted, but no reply was received.

Copy of the IRFP checklist is available on the Procurement Services Division website at:

<https://achieve.lausd.net/Page/12529> (logon using your single sign-on).



STEP SIX - SUBMIT YOUR REQUEST FOR CONTRACT TO PROCUREMENT

Upon completion of the Informal Request for Proposal (IRFP) process and selection of a vendor has been determined, submit your request for contract via a Shopping Cart in SAP.

The shopping cart should include the following documentation:

1. Signed Request for Procurement Action Form (RFP) and page two (Approval - Principal, Site Administrator, or Head of Organization)
2. Statement of Work (Word document format)
3. Copy of Solicitation Letter
4. Copies of proposals received
5. Signed IRFP checklist

Allow **15 working days** for Procurement to process your request. Vendors who reject LAUSD terms and conditions will cause additional processing days. **Note: the vendor is not authorized to start services until a fully executed contract is in place.**

Processing time provides for the drafting of contract document, verification of vendor compliance with insurance requirements, legal review (if applicable), completing a responsibility check on the selected vendor, and obtaining Contractor and District authorized signatures.

STEP SEVEN - APPROVAL OF INVOICE(S)/GENERATION OF GOOD RECEIPTS

After the vendor performs to your satisfaction, you must acknowledge receipt of the services and complete a Goods Receipt (GR) via the SAP system. For assistance in processing your Goods Receipts, please contact your LD Representative in the Shopping Cart Support Center. The Accounts Payable Branch cannot process payment to the vendor unless a GR has been created.

If you have any questions regarding this process, please feel free to contact the Procurement Services Division staff members assigned to support your Local District (LD) or the Central Office by visiting the Procurement Services Division Contact Us webpage at: <https://achieve.lausd.net/Page/1553>.

SAMPLE DOCUMENTS

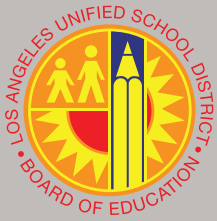
1. Solicitation Letter

- A. \$25,001 to \$150,000
- B. \$150,000 to \$250,000

2. Statement of work (SOW)

3. IRFP Checklist

A copy of the above documents can be found on the Procurement Services Division website at <https://achieve.lausd.net/Page/12529> (logon using your single sign-on).



(USE SCHOOL/OFFICE LETTERHEAD)

SAMPLE FOR \$25,001 TO \$150,000

February 28, 2018

To: Proposers

Subject: Informal Request for Proposal for Math Professional Development

This Informal Request for Proposal (IRFP) is issued to interested proposers under the assumptions that (1) Any resulting contract will not exceed \$150,000; (2) The final contractual terms and conditions will have no additions, changes, or deletions from the version attached hereto.

The Los Angeles Unified School District (LAUSD) is soliciting proposals for professional services consisting of a one (1) month Math Professional Development program.

Proposals are due at ABC High School, no later than 4:00 pm, March 13, 2018, Room # ____.

Period of Performance: March 18, 2018 - April 17, 2018

Location: ABC High School, Room # ____

Statement of Work: Professional Development for Mathematics Teachers, covering Grades 8 through 12.

Services and Deliverables to be provided by Firm:

(See attached Statement of Work)

Proposal Evaluation Criteria:

Proposals will be evaluated according to the following criteria:

Qualifications and Experience of Firm:	<u>30%</u>
Personnel Qualifications and Experience:	<u>20%</u>
Course Content:	<u>20%</u>
Small Business Enterprise Participation:	<u>5%</u>
Price:	<u>25%</u>

Subject to the provisions herein, Contract award will be made to the “highest scored” proposal, with the appropriate consideration given to the evaluation factors stated herein. However, the District reserves the right to make an award to other than the low cost Proposer.

Proposal Submittal Format:

Proposers shall submit an original hard copy and 5 copies on CD-ROM of a technical and price proposal. The technical proposal should contain at least a statement summarizing the proposers qualifications and experience.

The District reserves the right to reject a firm, as non-responsive, regardless of the stage of the procurement process, if there is a failure to successfully negotiate price/fees, statement of work, or a failure of the firm to satisfy any of the final requirements necessary to do business with the District. **(MANDATORY LANGUAGE TO BE INCLUDED IN ALL SOLICITATION LETTERS)**

All communications regarding this IRFP between potential Proposers and the staff of the DISTRICT and consultants engaged by the DISTRICT shall be addressed only to the undersigned. At no time “PRIOR” to the DISTRICT’S Notice of Award shall Proposer(s) contact other DISTRICT officials or personnel regarding this IRFP or any contract(s) to be awarded in response hereto. To do so may subject the Proposer to disqualification. **(MANDATORY LANGUAGE TO BE INCLUDED IN ALL SOLICITATION LETTERS)**

All requests for information related to this procurement shall be directed to:

Name

Department

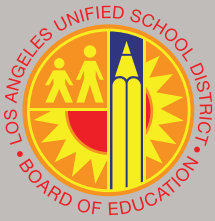
Address

Phone Number

Fax Number

E-mail Address

- Attachment:
1. Statement of Work (SOW)
 2. LAUSD Insurance Requirements
 3. Proposal Certification Form
 4. Professional Services Terms and Conditions
 5. Contractor Code of Conduct



(USE SCHOOL/OFFICE LETTERHEAD)

SAMPLE FOR \$150,000 TO \$250,000

February 28, 2018

To: Proposers

Subject: Informal Request for Proposal for Math Professional Development

This Informal Request for Proposal (IRFP) is issued to interested proposers under the assumptions that (1) Any resulting contract will not exceed \$250,000; (2) The final contractual terms and conditions will have no additions, changes, or deletions from the version attached hereto.

The Los Angeles Unified School District (LAUSD) is soliciting proposals for professional services consisting of a one (1) month Math Professional Development program.

Proposals are due at ABC High School, no later than 4:00 pm, March 13, 2018, Room # ____.

Period of Performance: March 18, 2018 - April 17, 2018

Location: ABC High School, Room #____

Statement of Work: Professional Development for Mathematics Teachers, covering Grades 8 through 12.

Services and Deliverables to be provided by Firm:

(See attached Statement of Work)

Proposal Evaluation Criteria:

Proposals will be evaluated according to the following process.
Firms failing to meet the Minimum Qualifications will not be subjected to any further consideration.

Minimum Qualifications:

- Proposing firm shall possess a minimum of 2 years experience in design and delivery of professional development for mathematics teachers.
- All trainers must have a minimum college degree of Master of Education.
- All trainers must have a minimum 5 years experience in mathematics training for K-12 public school teachers.

Evaluation Criteria:

Proposals meeting all of the Minimum Qualifications will be scored as follows:

Qualifications and Experience of Firm:	<u>30%</u>
Personnel Qualifications and Experience:	<u>20%</u>
Course Content:	<u>20%</u>
Small Business Enterprise Participation:	<u>5%</u>
Price:	<u>25%</u>

Subject to the provisions herein, Contract award will be made to the “highest scored” proposal, with the appropriate consideration given to the evaluation factors stated herein. However, the District reserves the right to make an award to other than the low cost Proposer. **(MANDATORY LANGUAGE TO BE INCLUDED IN ALL SOLICITATION LETTERS)**

Proposal Submittal Format:

Proposers shall submit an original hard copy and 5 copies on CD-ROM of a technical and price proposal as follows:

- Cover Letter addressing how firm meets the Minimum Qualifications, method by which firm will meet or exceed LAUSD standards and content requirements;
- Minimum of two references, including name, phone, and e-mail contact information, for similar services provided to large urban school districts;
- Proposed Syllabus for each day of training;
- List of all Items to be Provided by Firm;
- List of all Items and Facilities to be Provided by LAUSD;
- Staffing Plan for Training Period;
- Resumes of Trainers and Key Personnel;
- Itemized Firm Fixed Price Proposal, providing detail for each day of training: Training hours, Travel and Expenses, Training Materials, other Deliverables, Books, and payment schedule; and
- Proof of General Liability, Professional Liability, Automobile, and Workers Compensation Insurance, meeting the attached minimum coverage amounts, or a statement certifying that, if awarded a contract, firm will obtain the required coverage and amounts.

Proposals omitting any of the above required submittal items may be deemed non-responsive, and may be removed from any further consideration. **(MANDATORY LANGUAGE TO BE INCLUDED IN ALL SOLICITATION LETTERS)**

The District reserves the right to reject a firm, as non-responsive, regardless of the stage of the procurement process, if there is a failure to successfully negotiate price/fees, statement of work, or a failure of the firm to satisfy any of the final requirements necessary to do business with the District. **(MANDATORY LANGUAGE TO BE INCLUDED IN ALL SOLICITATION LETTERS)**

All communications regarding this IRFP between potential Proposers and the staff of the DISTRICT and consultants engaged by the DISTRICT shall be addressed only to the undersigned. At no time “PRIOR” to the DISTRICT’S Notice of Award shall Proposer(s) contact other DISTRICT officials or personnel regarding this IRFP or any contract(s) to be awarded in response hereto. To do so may subject the Proposer to disqualification. **(MANDATORY LANGUAGE TO BE INCLUDED IN ALL SOLICITATION LETTERS)**

All requests for information related to this procurement shall be directed to:

Name
Department
Address
Phone Number
Fax Number
E-mail Address

- Attachment:
1. Statement of Work (SOW)
 2. LAUSD Insurance Requirements
 3. Proposal Certification Form
 4. Professional Services Terms and Conditions
 5. Contractor Code of Conduct

EXHIBIT A

SB472 ELEMENTARY MATHEMATICS PROFESSIONAL DEVELOPMENT

STATEMENT OF WORK

1.0 Scope

The Los Angeles Unified School District Elementary Mathematics Initiative calls for a strong, articulated, and ongoing content-based professional development with the content standards at its core. Teachers are to be trained in the use of State adopted textbooks and other instructional materials. SB472 Elementary Mathematics Professional Development (SB472) offers an opportunity for teachers to get this additional professional development.

SB472 provides incentive funding for 40 hours of professional development for teachers and stipulates that participating districts engage a State Board Approved Provider to provide the teacher training.

The purpose of this agreement is to establish a multi-year contract with a State approved Contractor for training that will be provided to District teachers. **Approximately up to 2,000 teachers per year will participate.**

One of the goals of the District Elementary Mathematics Initiative is to establish an on-going system to improve the quality of mathematics teaching. A key component of this Initiative's focus on instructional improvement is the professional development of classroom teachers. The training of teachers will be program (Pearson Scott-Foresman-Scott Foresman-Addison Wesley enVisionMath CA) and grade level specific at the elementary school level (K-5). Professional development will be available to off-track teachers at locations throughout the Los Angeles metropolitan area.

The District reserves the right to approve the final training binders prior to reproduction or use. The District's Research and Planning Division is engaged in the evaluation of the Elementary Mathematics Initiative. Professional development and its effectiveness is a key component of this evaluation. An internal evaluation of the professional development sessions will be conducted by the Research and Planning Division.

2.0 District-adopted K-5 Mathematics Textbook

Scott Foresman-Addison Wesley enVisionMath CA (Pearson Scott Foresman - Publisher; Charles, et al. - Author)

3.0 Requirements

The Contractor shall:

1. Design and conduct 40 hour training sessions that develop teacher knowledge of the District's adopted core instructional materials (enVisionMath CA). The maximum number of participants per presenter will be 35. This training shall include specific materials and activities to help teachers implement the materials as designed. This 40 hour training sessions will deepen teacher knowledge of the District's adopted core instructional materials (enVisionMath CA). This training shall include specific materials and activities to help teachers implement the materials as designed and progress to focus on developing teacher expert knowledge of mathematics and research based instructional strategies for helping teachers understand diverse learning needs. Specific components of the training for teachers shall focus on closing the achievement gap

through culturally relevant and responsive methodologies and shall emphasize meeting the needs of all students including: English Learners, Students with Disabilities, Gifted and Talented students, and Standard English Learners.

2. Develop and provide all teacher-training materials. The Contractor's SB472 materials shall be approved by the State Board of Education. The Contractor's SB472 materials and training shall emphasize meeting the needs of all students including: English Learners, Students with Disabilities, Gifted and Talented students, and Standard English Learners.
3. Train and provide experienced trainers that shall conduct 40 hours of off-site training for participating teachers.
4. Plan a calendar of professional development sessions that are accessible to teachers on all tracks and calendars. The first sessions shall be scheduled in June 2009.
5. Select and obtain professional development training sites. Professional development sessions shall be conducted at a variety of sites throughout the Los Angeles area and will be held in professional environments conducive to learning. Contractor shall be responsible for providing the necessary audio-visual equipment including computer, projector, microphone, speakers, screen, podium, easel, chart paper, markers, etc. Contractor shall provide continental breakfast and lunch to participants.
6. Make arrangements, monitor, and communicate with a California university (preferably UCLA or CSU Fullerton) for university credit for participants who complete the training.

4.0 Deliverables

1. Professional Development Sessions shall include 40 hours of initial in-seat training and shall be taught by experienced trainers who have appropriate pedagogical content knowledge and first-hand experience with the State-adopted curricular materials. Professional development sessions shall include appropriate daily homework and opportunities for additional study. (Sessions shall include breakfast and lunch.) Proof of attendance is required for invoicing.
2. Evaluation Report of the professional development sessions through written teacher feedback and trainer evaluations shall be submitted to the District on an annual basis.

END OF STATEMENT OF WORK

**PROCUREMENT SERVICES DIVISION
INFORMAL REQUEST FOR PROPOSAL (IRFP)
CHECKLIST**

1. Date written solicitation sent to all vendors: MM/DD/YY _____

Vendors
2. solicited:

Name _____
Address _____
City _____ State, _____
ZIP _____
Phone: _____ E-mail _____
Contact Name: _____

Proposal
Received

☐ ☐
Yes No

Name _____
Address _____
City _____ State, _____
ZIP _____
Phone: _____ E-mail _____
Contact Name: _____

Proposal
Received

☐ ☐
Yes No

Name _____
Address _____
City _____ State, _____
ZIP _____
Phone: _____ E-mail _____
Contact Name: _____

Proposal
Received

☐ ☐
Yes No

3. Date all written proposals received: MM/DD/YY _____

4. Evaluation method used for all proposals:

Professional/Technical Qualifications _____
Experience _____
Other (specify) _____
Small Business Enterprise Participation _____
Price _____

Total Possible
Score: _____

5. Date of proposal evaluation: MM/DD/YY _____

Evaluation

6. result:

Vendor _____	Price _____	Average Score _____
Vendor _____	Price _____	Average Score _____
Vendor _____	Price _____	Average Score _____

7. Vendor recommended for award: Name _____

8. Reason for
recommendation:

9. Evaluators:

Name _____	Signature _____
Name _____	Signature _____
Name _____	Signature _____
Name _____	Signature _____

With respect to the referenced IRFP, I certify that to the best of my knowledge, I have not knowingly violated any applicable laws, rules, or policies regarding contracting/procurement activities. I participated in the solicitation and evaluation processes in a fair and impartial manner where appropriate and I have not knowingly violated any conflict of interest requirements, in particular. Additionally, all supporting documents in my possession related to this transaction are available for inspection upon request.

I have treated all IRFP discussions and materials as confidential.

10. Authorized person:

I certify that to the best of my knowledge, I have not knowingly violated any applicable laws, rules, or policies regarding contracting/procurement activities. I have conducted a fair and impartial competition where appropriate and I have not knowingly violated any conflict of interest requirements. Additionally, all supporting documents related to this transaction are attached hereto or are available for inspection upon request.

Signature of Authorized Person

Date

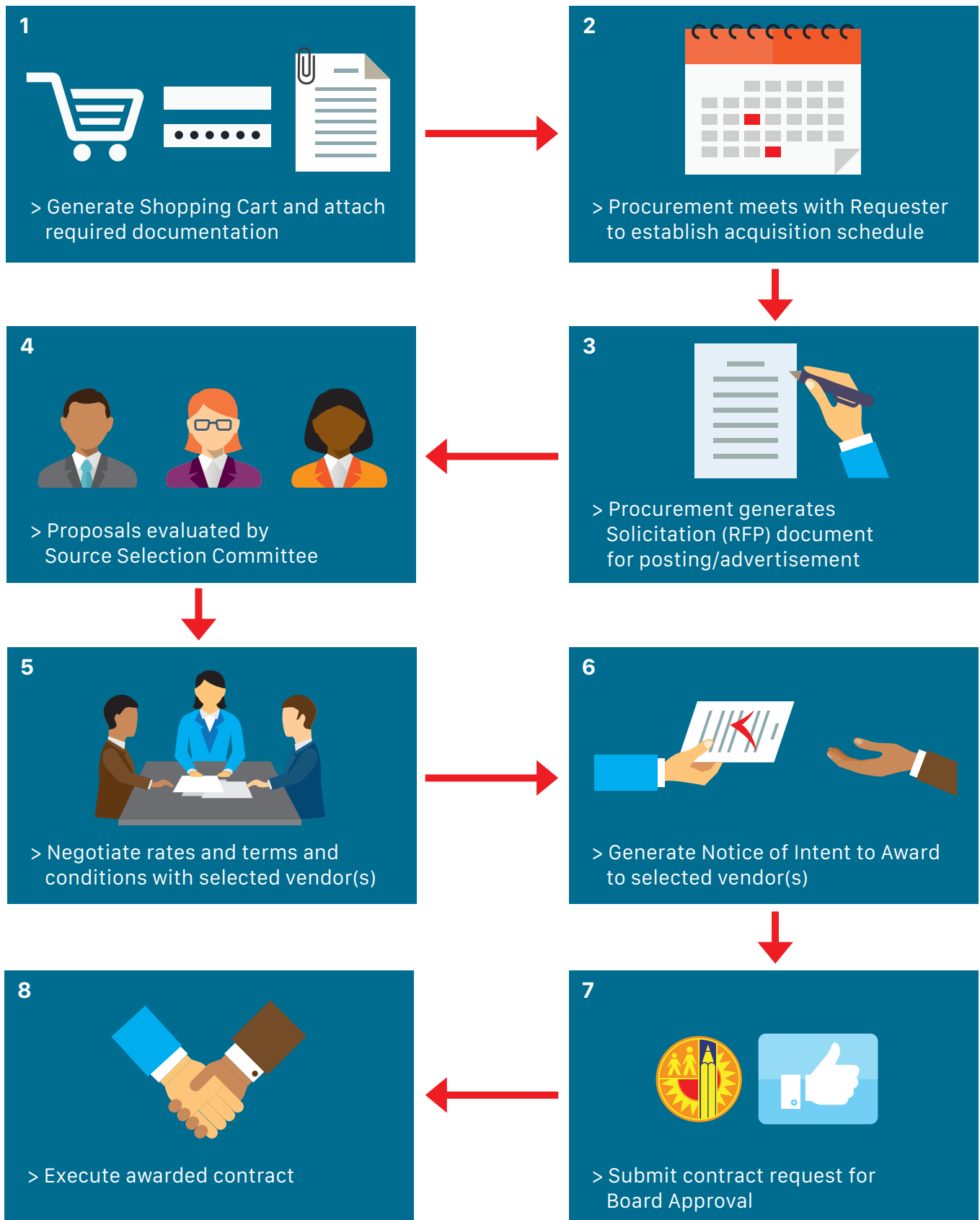
Printed name and title of Authorized Person (Principal/Head of Organization)



OVER \$250,000

PROFESSIONAL SERVICES CONTRACTS OVER \$250,000

(Processing time - minimum 4 months)



PROFESSIONAL SERVICES CONTRACTS OVER \$250,000

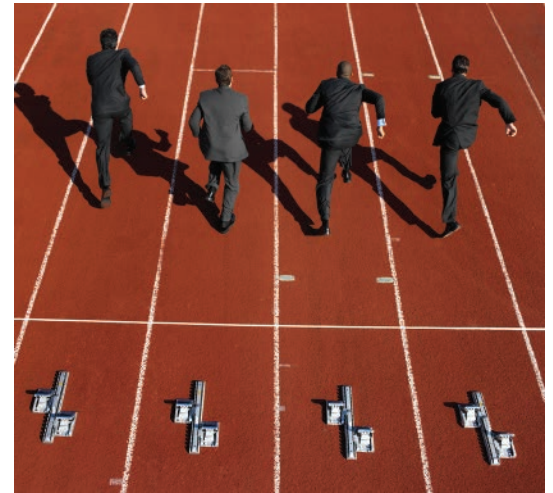
Professional Services over \$250,000 require **formal competition**. District policy requires that formal competition be conducted by the Procurement Services Division via a Request for Proposal (RFP) that may require a minimum of 120 days to process.

REQUEST FOR PROPOSAL:

The competitive process for contracts over \$250,000 will be conducted by the Procurement Services Division.

Provide the following documentation as part of your request.

- Generate a Shopping Cart in SAP with appropriate funding, attaching:
 - Request for Procurement Action Form (RFP) and Page Two (Approvals: Principal, Site Administrator, Head of Organization, or Senior Staff)
 - Statement of Work
 - Evaluation Criteria (Minimum Qualifications and Evaluation Criteria)
 - List of individuals (minimum 3) to serve as Source Selection Committee members to evaluate proposals




Upon receipt of the above documentation the Procurement Services Division will meet with the requesting school/office to develop an acquisition schedule. The acquisition schedule will provide a timeline to complete all required tasks to ensure fair competition.

Tasks to be completed are:

1. 30 day posting and advertising of Request for Proposal
2. Pre-Proposal Conference (if applicable)
3. Questions and Answers period
4. Evaluation of Proposals
5. Negotiations
6. Pre-award audit (where required)
7. Legal Review and Approval of proposed contract
8. Notice of Intent to Award
9. Protest Period (5 business days)
10. Board Approval
11. Full Execution of Awarded Contract

The above tasks may require a minimum of 120 days to complete. Please note, the timeframe required to complete the formal RFP process may differ depending on the complexity of the procurement.

Note: Multi-million dollar RFPs may require a pre-award audit if greater than \$5 million.

 **REMINDER:** School Principals, Office Administrators, Heads of Organizations, and/or Senior Staff DO NOT have the authority to sign vendors' contracts.



AFTER THE FACT

AFTER THE FACT REQUESTS

(Contractor was allowed to start services prior to an authorized purchase order or contract being in place.)

After the Fact contracts are prohibited by District policy.

Please ensure you plan your request for professional services with ample time to gather required documentation, obtain required approvals, and conduct an IRFP where needed.

It is extremely important to note that the District will not process invoices that do not have a valid contract or purchase order executed by authorized District personnel.



Therefore, all vendors are required to have a valid contract or purchase order **prior** to providing services or delivering goods to a school or office within the District.

If the vendor provides services or delivers goods in advance of a valid executed contract or purchase order, the vendor does so at its own risk and invoices received will not be processed for payment.

You must ensure that prior to receipt of services or materials delivered by a vendor, the appropriate procedures are followed to ensure prompt payment to the vendor.



SINGLE SOURCE REQUESTS

District policy requires that all professional services contracts be competed whether it is through an informal process (IRFP - conducted by school/office) or by formal competition conducted by the Procurement Services Division via a Request for Proposal (RFP).

A Single Source contract may be approved for items that fit the following exceptions:

- Service issue;
- Location;
- Availability;
- Capacity;
- District or school emergency; and/or
- State or Grant Mandated Provider

A request for Single Source memo must be submitted with your contract request providing the following information:


- Why is this necessary?
Explain why this service is required.
- Why is this firm selected?
Do we have prior experience with the vendor that this procurement will build upon? Is the service to be provided unique or proprietary in nature? Please include whether the firm is a small business and/or its employees belong to a union. If grant-named vendor, indicate.
- Explain why this contract could not be competitively bid.
Describe why this contract request could not undergo the normal competitive bid process required by the Board.
- How was a fair price established?
Provide details about the firm's competitors and pricing; how this is a best value for the District.
- What would happen if this were not approved?
Clarify ramifications of taking action versus not taking actions; including delay for competitive procurement.
- What are the terms of the proposed agreement?
Identify terms of any proposed agreement, including the funding sources. Identify any savings over the previous year, "green" initiatives.



Required approvals:

Principal/Head of Organization **AND** LD Instructional Area Superintendent/Senior Staff

If the Single Source request does not qualify as a justification to contract without competition, it will be returned to the school/office to conduct an informal request for proposal process. This will cause a delay in the processing of your contract request and may impact the requested start date of services.

 **REMINDER:** School Principals, Office Administrators, Heads of Organizations, and/or Senior Staff DO NOT have the authority to sign vendors' contracts.

PROFESSIONAL SERVICES

Dos and Don'ts



DO: Contact your Procurement Representative if you have any Procurement related questions. You can find Contacts page at <https://achieve.lausd.net/Page/1553>.



DO: Use a Purchase Order only for all Professional Services up to \$25,000.



DO: Get best value for Professional Services by obtaining a minimum of three (3) written proposals/quotes for all services.



DO: Process a "Goods Receipt" after completion of services or delivery of products.



DON'T: Sign any vendor's contract. Principals, Heads of Organizations, and Site Administrators DO NOT have the authority to sign vendors' contracts.



DON'T: Issue "After the Facts" contracts or purchase orders. Contractors and Vendors are not allowed to begin work without a prior valid contract or purchase order.



DON'T: Issue "Single Source Contracts." Please send Informal Request for Proposal (IRFP) to a minimum of three (3) vendors.



DON'T: Allow vendors to write your "Scope of Work." As the Contract Sponsor, you know what is best for your school or office.



DON'T: Use informal request for proposal (IRFP) process to issue contracts over \$250,000. Contracts over \$250,000 must be processed as a Formal Request for Proposal and is handled by Procurement.



Los Angeles Unified School District
Procurement Services Division
333 S. Beaudry Ave., 28th Floor
Los Angeles, CA 90017