

# DOING BUSINESS WITH



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**DOING BUSINESS WITH  
SADDLEBACK VALLEY UNIFIED SCHOOL DISTRICT**

**FORWARD**

This information is to acquaint individuals who desire to sell to Saddleback Valley Unified School District with the procedures followed by the Purchasing Department in carrying out purchasing activities. We place a high value on friendly, personal contact with our suppliers and potential suppliers.

This is intended as a general guideline and as such, may not answer all of your questions. Any questions not answered here may be answered by calling the Purchasing Department at (949) 580-3307.

**PURCHASING CODE OF ETHICS**

1. To regard public service as a sacred trust, giving primary consideration to the interests of the school district and the community by which we are employed.
2. To purchase without prejudice, seeking to obtain the maximum benefit for each tax dollar expended.
3. To avoid any unfair, questionable, or unethical practices.
4. To respect our obligations and to require that obligations to our school district be respected.
5. To accord vendor representatives the same courteous treatment we would like to receive.
6. To strive constantly for the improvement of our purchasing methods and the materials we buy.
7. To assist purchasing agents of other public entities in the performance of their duties whenever possible.
8. To conduct ourselves with fairness and dignity, avoid conflicts of interest, and demand honesty in buying and selling.
9. To cooperate with all organizations and individuals engaged in enhancing the development of the purchasing profession.
10. To remember that we act as representatives of the school district and to govern ourselves accordingly.
11. To negotiate the lowest purchase prices feasible while maintaining quality products and service.
12. To adhere to all laws and regulations and to be strong advocates for the success of women, minority, and disabled veteran-owned businesses.
13. Members of the Board of Education (Board) and any district employee shall not be financially interested in any contract made by them in their official capacity; nor, shall any member of the Board and any district employee be purchasers of any sale or vendors of any purchase to the district in which they are financially interested.

**EQUIPMENT, SUPPLIES AND SERVICES – QUOTATION AND BID INFORMATION**

The acquisition of materials and/or services totaling \$15,000.00 or less (including sales tax) may be made by issuing a purchase order following competitive negotiations with one or more vendors. In many instances, negotiation with more than one vendor is preferable.

Unless waived for good cause, our policy is to obtain written quotations from two or three vendors for equipment, supplies and services (except for public works projects) totaling more than \$15,000.00 and up to \$88,299.99 (including applicable sales tax).

Formal advertised bids are required for equipment, supplies and services equal to or exceeding \$88,300.00 (including applicable sales tax) except for public works for which we have adopted the Informal Bidding Procedures for public works projects as explained in the following section.

All advertised bids for equipment, supplies and services will be received ONLY in the Purchasing Department in a sealed envelope identified with the bid name and number no later than the date

and time specified in the bid instructions. Bids received after the scheduled bid closing time will be returned unopened to the bidder.

Presence at bid openings is not required, although vendors are welcome to attend.

The purchase of goods and/or services shall be let to the lowest responsible and responsive bidder meeting specifications, except for technology equipment, supporting software and related materials, goods and services where the bid may be let to any one of the three lowest bidders meeting specifications.

After bids have been reviewed and analyzed, a recommendation shall be made to the Board at a regularly scheduled Board meeting. Bids will be available for review in the Purchasing Department after the awards have been made.

\*Annual inflation adjustment, Public Contract Code 20651(a)

### **PUBLIC WORKS PROJECT – QUOTATION AND BID INFORMATION**

A “public works project” means any of the following:  
(Public Contract Code 22002)

1. Construction, reconstruction, erection, alteration, renovation, improvement, demolition, and repair work involving any publicly owned, leased or operated facility, any public structure, building, road or other public improvement of any kind.
2. Painting or repainting of any publicly owned, leased, or operated facility.

The District has adopted the alternative bidding and contracting procedures for public works projects under the Uniform Public Construction Cost Accounting Act as specified in Public Contract Code §22000 et seq.

Public works projects totaling \$15,000 or less (including sales tax) may be made by issuing a purchase order following competitive negotiations with one or more licensed contractor. In many instances, negotiation with more than one contractor is preferable.

Unless waived for good cause, our policy is to obtain written quotations from two or three contractors for public works projects totaling \$15,000 and up to \$45,000 (including applicable sales tax).

Public works projects totaling \$45,001 and up to \$175,000, are handled by informal bidding procedures per Public Contract Code §22000 et. seq. These bids are handled the same as the formal bids with these exceptions:

1. Informal bid notices will be sent per project to applicable trade contractors on District’s qualified list.
2. Contracts may be awarded by the District Superintendent or the Superintendent’s designee and ratified at a regularly scheduled Board meeting.

Public works projects exceeding \$175,000 (including applicable sales tax), are handled by formal bidding procedures and are formally advertised, or through other Board approved delivery method.

All advertised bids for public works projects will be received at the designated location in a sealed envelope identified with the bid name and number no later than to the date and time specified in the bid instructions. Bids received after the scheduled bid closing time will be returned unopened to the bidder.

Presence at bid openings is not required, although vendors are welcome to attend.

The purchase of public works services shall be let to the lowest responsible and responsive bidder meeting specifications.

After bids (over \$175,000) have been reviewed and analyzed, a recommendation is made to the Board at a regularly scheduled Board meeting. Bids will be available for review upon request.

#### **BID ADVERTISEMENTS FOR INFORMAL PUBLIC WORKS PROJECTS**

Each November, the District will solicit newly licensed contractors to update its database of qualified contractors by advertising in the following Construction Trade Journals: *Associated General Contractors of America and Southern California Builders Association*. For projects to be bid, the District will send bid notices to those individual contractors, that are listed on the qualified list as specified in Public Contract Code §22000 et. seq.

#### **BID ADVERTISEMENTS FOR FORMAL BIDS FOR EQUIPMENT, SUPPLIES & SERVICES**

Bid announcements for formal bids are published once a week for two consecutive weeks in the *Orange County Register*.

#### **CURRENT BID AND PROPOSAL OPPORTUNITIES FOR PUBLIC WORKS**

To obtain a list of current Bids for Public Works Projects and/or Request for Proposals (RFP) go to [https://saddlespace.haikulearning.com/doirons/moc/cms\\_page/view](https://saddlespace.haikulearning.com/doirons/moc/cms_page/view), and click the CUPCCA & Current Bid Listings tab. Current Bid Listings will be posted on this page. The site can also be found by visiting the homepage at: <http://svwp.svusd.org/>, click Departments, click Facilities & Planning, click CUPCCA & Current Bid Listings tab. Please be sure to check back periodically for updates.

#### **VENDOR LIST FOR EQUIPMENT, SUPPLIES & SERVICES (excluding i.e. public works, construction)**

An application form is normally required prior to being placed on our official Vendor List. New Vendors must fill out the forms on the Purchasing Department web page. Log onto the District web page at [www.svusd.k12.ca.us](http://www.svusd.k12.ca.us) and go to the Purchasing Department. Complete the Vendor Registration Form along with the W-9 form. This is the input document for our vendor database. This database is used by the department when soliciting bids and quotations for various District requirements. However, placement on the Vendor List is no guarantee of solicitation for bids and/or quotes. Vendors are urged to check regularly with the Purchasing Department to keep informed of current requirements.

#### **QUALIFIED CONTRACTORS LIST (PUBLIC WORKS/CONTRACTORS)**

Those licensed contractors interested in performing public works projects for the District must complete the District's online "Contractors Letter of Interest Application" which is available at [www.svusd.k12.ca.us](http://www.svusd.k12.ca.us) under Purchasing Department. Complete the Contractors Letter of Interest Application along with the W-9 form.

Contractors must be currently registered with the Department of Industrial Relations (DIR) and meet the requirements of Labor Code section 1725.5 to qualify for any District project and therefore all contractors must provide a current and valid DIR registration number on its application. Contractor must maintain valid registration with DIR throughout the current year and must provide proof that it is

currently registered with DIR when bidding for any District project. Even if a contractor is placed on the Qualified Contractor List, the contractor cannot perform any work on any District project without a current and valid DIR registration. By submitting an application to be included on the District's Qualified Contractor List, contractor confirms that it is in compliance with all applicable DIR regulations and has the capacity to maintain compliance throughout the calendar year and during any District project.

Also, please note no subcontractor may be listed on a bid for a public works project unless the subcontractor has, and maintains, a DIR registration number throughout any work it provides for any District project. To register, go to the DIR website.

All Contractors are responsible for ensuring their application is received by the District.

#### **REMOVAL FROM BID LIST**

Failure to respond to bid or quote requests or inadequate contractual performance may result in removal from our bidder's list.

#### **BOND AND SURETY REQUIREMENTS**

Bidders may be required to provide a Bid Security with advertised bids. Successful bidders may, in addition, be required to furnish any or all of the following:

100% Performance Bond

100% Payment Bond

Commercial General Liability Insurance/Property Damage certificate

Worker's Compensation certificate

Comprehensive Automobile Liability certificate

Specific requirements will be outlined in each bid.

#### **DISTRICT INSURANCE REQUIREMENTS**

It is required that every vendor and contractor working for the Saddleback Valley Unified School District meet the following insurance requirements. The vendor and contractor will be required to file with the District certificates of such insurance and endorsements. Failure to furnish such evidence will be considered default of the vendor and contractor.

Prior to commencing work, and continuing during the life of the project, vendor and contractor shall take out, and require all subcontractors, if any, to take out and maintain:

Not less than a combined single limit of \$1,000,000 per occurrence for bodily injury, personal injury, and property damage for Commercial General Liability Insurance/Property Damage and \$2,000,000 general aggregate.

Not less than \$1,000,000 per accident for Workers' Compensation.

Not less than a combined single limit of \$1,000,000 per occurrence for bodily injury, personal injury, and property damage Comprehensive Automobile Liability.

The District shall be named as an *additional insured* on the Commercial General Liability and Comprehensive Automobile Liability policies, *documented by a written endorsement*, and the policy must carry a *30-day* cancellation clause.

#### **PRE-BID MEETINGS AND JOB WALKS**

Vendors and contractors are strongly encouraged (and in some instances mandatory) to attend pre-bid meetings and job walks. These services are provided for your assistance in clearly understanding all specifications and requirements. This will enable you to express any concerns before the bid date.

### **COMPLETING THE ORDER**

Vendor must deliver the exact products or services upon which they bid. Failure to do so may constitute breach of contract and could impact a vendor's future ability to do business with the District. Vendors are advised to notify the Purchasing Department immediately if they are unable to fulfill the requirements of a purchase order which has been issued to them.

### **BOARD RESOLUTION PERMITTING COOPERATIVE PURCHASING**

Providing the agency with whom the District wants to do business has a reciprocal agreement, the Saddleback Valley Unified School District Board may "piggyback" (PCC 20118) onto active bids for the acquisition of equipment, materials and services from other school districts, as well as state and other public agencies, in accordance with different education codes and public contract codes governing such activities.

### **HAZARDOUS PRODUCTS**

Vendors are required to provide proper labeling and Material Safety Data Sheets on all products that are considered hazardous as defined by Title 8, California Code of Regulations. The MSDS is required when the merchandise is shipped.

### **CONTACT WITH DISTRICT PERSONNEL**

The District urges vendors to deal directly with the Purchasing Department on all purchasing related matters including sales calls, sales presentations, promotions, catalog distribution, returns, exchanges and substitutions. Vendors are discouraged from making sales calls directly to the school sites and with District personnel. Vendors should first contact the Purchasing Department or other Department personnel for direction and advice before making any sales presentations. This will save time and minimize confusion as to proper roles and authority in the District's procurement process. Only the Purchasing Department is authorized to issue purchase orders. District employees are not to place orders for goods/services unless they have an approved purchase order. Vendors are not to accept orders or deliver any goods/services without an approved purchase order. Purchases made in the name of the District without an authorized purchase order shall be considered an obligation of the person making the purchase and *not* an obligation of the District.

Vendors will occasionally expend a considerable amount of time in presenting or designing a product in hope of making a sale. If you do this, remember that the purchase will normally be made to the lowest responsible and responsive bidder meeting the specifications, terms, and conditions. Your investment of time and/or expenditures for design, demonstrations, layouts, etc., does not guarantee award to your company or preferential treatment of any kind.

### **DELIVERIES**

All materials for Saddleback Valley Unified School District should be shipped to Saddleback Valley Unified School District, Warehouse, 25631 Peter A. Hartman Way, Mission Viejo, CA 92691, unless otherwise noted on the purchase order. The purchase order number must appear on all cartons and packing slips.

### **INVOICE AND PAYMENT**

To receive payment, ALL invoices shall be directed to Saddleback Valley Unified School District c/o Accounts Payable, 25631 Peter A. Hartman Way, Mission Viejo, CA 92691. Invoices sent elsewhere may delay payment. To expedite your payment, all invoices must include the purchase order number. All school purchases are subject to California sales tax. Vendors will normally expect payment within 45 days

of billing provided that proper purchasing procedures have been followed.



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