CULTIVATING BRIGHT FUTURES

PROCUREMENT HANDBOOK

The Santa Maria-Bonita School District's Contracts and Procurement Service Area is dedicated to strategically acquiring goods and services that directly support our district's mission to cultivate and enrich our diverse community. We uphold transparent and ethical purchasing practices, ensuring the best value for public funds so that every student can discover their passion and purpose, exercise self-determination, and reach their maximum potential through a student-centered culture distinguished by a whole child approach, an inclusive environment, community and family engagement, transformational innovation, and highly effective staff.

Rev: 8/19/2025

Introduction

The Contracts and Procurement Service Area serves as the centralized authority for all District-wide purchasing and contractual engagements. This includes, but is not limited to, vendor selection, contract negotiation, and compliance oversight, ensuring adherence to all relevant policies and regulations.

This handbook is designed to familiarize District personnel with the fundamental procedures for purchasing supplies, materials, equipment, and services. The Procurement Service Area's goal is to establish an organizational structure that effectively manages the procurement and distribution of all goods and services, ensuring the District complies with all Federal, State, and Governing Board policies. This procurement handbook provides reference information on the procurement methods used and will assist the user in answering day-to-day questions about purchasing and other related procurement activities.

The Procurement Service Area provides services to school sites and district Service Areas through the purchase order process via the Escape Requisition online purchasing system. Sites and Service Areas enter requisitions into the Escape system to initiate the procurement process.

All requisition approvals are handled electronically, allowing the requisitioner to track their status throughout the process. Once approved, the Procurement Service Area processes the requisition and issues a purchase order. This typically takes 1 to 7 business days. For emergency orders, sites and Service Areas must personally guide the requisition through all approval levels before the Procurement Service Area can place the order. For emergency orders, please contact the Site/Service Area assigned Buyer directly to ensure the order is placed promptly.

The Governing Board shall retain sole approval authority and responsibility for all purchase contracts of the District except as delegated by official action of the Governing Board and comply with Sections 54202 and 54204 of the Government Code of California, which state:

- 54202. "Every local agency shall adopt policies and procedures, including bidding regulations, governing purchases of supplies and equipment by the local agency. Purchases of supplies and equipment by the local agency shall be in accordance with all provisions of law governing the same. No policy, procedure, or regulation shall be adopted that is inconsistent or in conflict with statute."

- 54204. “If the local agency is other than a city, county, or city and county, the policies provided for in Section 54202 shall be adopted by means of a written rule or regulation, copies of which shall be available for public distribution.”

TAB 2

VENDOR & CONTRACTOR RELATIONSHIP GUIDELINES

CONTRACTS & PROCUREMENT STAFF CONTACT INFORMATION

Vendor and Contractor Relationship Guidelines

To foster professional and courteous relationships with all vendors and contractors, the Contracts and Procurement Service Area staff, and District staff interacting with these vendors must adhere to the following procedures. These guidelines ensure appropriate conduct and uphold staff integrity.

Vendor Meetings

Suppliers' representatives may request an initial meeting with procurement staff to discuss their products. At the discretion of the Procurement Service Area, subsequent meeting requests will be acknowledged promptly and courteously; however, ongoing meetings may or may not be granted, depending on the circumstances. Vendors are advised to contact the Procurement Service Area to schedule a meeting.

Fairness and Objectivity

District staff shall not show favoritism to any vendor. All orders must be placed based on a balanced evaluation of quality, price, service, and delivery. When two or more identical lowest or highest bids are received, the Governing Board or designee may determine by lot which bid shall be accepted.

Soliciting Funds/Donations

Procurement staff must never solicit funds, donations, or materials from vendors, regardless of the perceived worthiness of the cause.

District staff outside of the Procurement Service Area are permitted to contact vendors to offer opportunities for donating to or sponsoring various events or programs. However, sponsoring an event or program will not provide any advantage or result in favoritism within the District's bid process.

Personal Relationships & Conflicts of Interest

To maintain fairness and avoid favoritism, District staff are prohibited from having personal relationships with vendors who conduct business with the District. Any existing personal relationship or potential conflict of interest must be immediately reported to the District Contracts and Procurement Service Area.

CONTRACT & PROCUREMENT SERVICES

STAFF ASSIGMENTS

PATRICIA MCKNIGHT, C.P.M
COORDINATOR OF PURCHASING
PMCKNIGHT@SMBSD.NET

SERVICE AREA OVERSIGHT
PUBLIC WORKS
CONTRACTS
AMAZON SETUP

ANEL DIAZ
BUYER
ADIAZ@SMBSD.NET

ASSIGNED SERVICE AREAS

FOOD SERVICE
TEACHING & LEARNING - SP
MULTILINGUAL SERVICES
IMC LIBRARY
BUSINESS/PURCHASING

ASSIGNED SCHOOL SITES

ADAM ELEMENTARY
ALVIN ELEMENTARY
ARELLANES ELEMENTARY
BATTLES ELEMENTARY
BILL LIBBON ELEMENTARY
BONITA ELEMENTARY
BRUCE ELEMENTARY
FAIRLAWN ELEMENTARY
JIMENEZ ELEMENTARY

ADDITIONAL ASSIGNMENTS

CREDIT CARDS
OBSOLETE ITEMS
ANNUAL INVENTORY
OFFICE DEPOT USER SETUP
AMAZON BPO RELEASE
FIXED ASSETS BACKUP

ANGELA GUDMUNDS, J.D., CPOS
BUYER
AGUDMUNDS@SMBSD.NET

ASSIGNED SERVICE AREAS

MAINTENANCE & OPERATIONS
EDUCATIONAL SERVICES &
TEACHING/LEARNING CORE
SPECIAL EDUCATION
PLAN ALIGNMENT

ASSIGNED SCHOOL SITES

LIBERTY ELEMENTARY
MILLER ELEMENTARY
OAKLEY ELEMENTARY
ONTIVEROS ELEMENTARY
RICE ELEMENTARY
SANCHEZ ELEMENTARY
TAYLOR ELEMENTARY
TUNNELL ELEMENTARY

ADDITIONAL ASSIGNMENTS

CREDIT CARDS
SURPLUS SALES
COPIERS
ANNUAL INVENTORY
CELL PHONE ACCOUNT/ORDERING
AMAZON BPO RELEASE
OFFICE DEPOT USER SETUP

PATTI WILEY
CONTRACT & PROCUREMENT
ANALYST
PWILEY@SMBSD.NET

ASSIGNED SERVICE AREAS

STUDENT & FAMILY SERVICES
HUMAN RESOURCES
INFORMATION TECHNOLOGIES
SUPERINTENDENT
SCHOOL SUPPORT

ASSIGNED SCHOOL SITES

ARELLANES JHS
EL CAMINO JHS
FESLER JHS
KUNST JHS

ADDITIONAL ASSIGNMENTS

CONTRACT PROCESSING
CREDIT CARDS
VENDOR SPEND REPORT
ANNUAL INVENTORY
WAREHOUSE
INVENTORY/REPLENISHMENT
FIXED ASSETS
AMAZON BPO RELEASE
OFFICE DEPOT USER SETUP

TAB 3

PURCHASING INFORMATION
REQUISITION PROCESSING
PO TYPES
MERCHANDISE RETURNS

Procurement End-of-Year Cutoff Dates

The purchasing cutoff dates for the end of the year will be posted on the District's Contracts and Procurement webpage during the first week of the new school year. All orders must be received no later than the last business day in June of the Fiscal Year in which the order was placed.

Signature Authority

Per California Education Code 42632, the Santa Maria-Bonita Board of Education has designated signature authority to the following District staff. No other district staff member has the authority to sign documents that financially commit the District.

- Superintendent
- Deputy Superintendent
- Coordinator, Budget and Finance
- Accounting Supervisor

All purchases for the District must be authorized by one of the District's abovementioned signatories. School Principals, office administrators, Service Area leads, and/or senior staff do not have delegated authority to place orders for goods or services (internet purchases, software, transportation, party rentals, etc.), or the authorization to sign contracts.

No procurement shall be valid or constitute an enforceable obligation against the SMBSD if proper signatories have not been authorized by their signature or if the contract action is not approved or ratified by the Board. (Education Code § 17604, Public Contract Code § 20111, and §20118 et seq..). Any individual, outside those authorized by the board of education, who authorizes a contract may incur personal responsibility for the terms of that contract.

Unauthorized Purchases

The Procurement Service Area manages and oversees all of the District's purchasing functions. If an unauthorized purchase occurs, the following applies:

- The District may choose not to reimburse for any supplies or equipment purchased by staff members outside of the purchase order process.
- Purchases made in the District's name without an authorized purchase order are the personal obligation of the individual who made the purchase.
- Sellers delivering materials or services without a fully executed purchase order are at their own risk and will not be guaranteed payment.

Placing unauthorized orders leads to duplicate orders, delayed vendor payments, and violates both Board Policy and state law (Education Code Section 42632).

Emergency Purchases

If an emergency arises, contact the Contracts and Procurement Service Area for assistance with obtaining the proper authorization to procure the necessary items or services. A staff member who purchases items or authorizes services without proper authorization may be held personally responsible for the purchase.

Requisition and PO Types

Type	Description
REQ	Standard requisition is used for one-time purchases or events
BPO	Blanket Purchase Order is used for purchases throughout the year – Example: Office Depot, Amazon, and US Bank. Asset items (items with an individual cost of $500 or more) may not be purchased utilizing a BPO and require a standard Purchase Order be entered
CPO	A Contract Purchase Order is used for contracts that require a signature
FS	Food Service is to be used by the Food Services Service Area only
LP	The Library Purchase Order is used only by the Instructional Materials Service Area
TC	Travel and Conference is used for employee travel reimbursement
SR	Warehouse Stores is used to order inventory items and forms from the warehouse

When entering a requisition, ensure the requisition contains the following information:

- Item or part number
- Correct unit of measure
- Complete Item Description – including color(s) and options
- Quantity
- Quote Number if applicable – list in the before message area and upload a copy into the requisition
- Sales Representative's contact name and email if applicable
- Shipping cost, if applicable

Sample requisitions are provided in the Samples and Guides Tab in this manual and may be located on the Contract & Procurement Services District webpage under the “Procedure Guides & Samples” dropdown tab.

Change Orders

Purchase Order Modifications

Modification to an existing purchase order requires completing the change order modification form located on the Contract & Procurement Services District webpage under “Contract & Procurement Forms” dropdown tab.

Blanket Purchase Order Modifications

Requisitioners are responsible for monitoring BPO purchases to ensure the total expenditure does not exceed the approved BPO amount. BPOs cannot be modified by more than 10% to cover unexpected costs (e.g., freight or tariff charges). Once a BPO has been fully expended, the requisitioner must submit a new BPO requisition to continue making purchases.

Contract/Agreement/MOU Change Order

To ensure accuracy, proper accounting, and legal compliance, any changes to an already issued contract—including alterations to the scope, quantity, price, or delivery schedule—must be processed as a formal change order and contract amendment.

To request a change to an existing contract, agreement, or MOU, please contact the Contracts and Procurement Analyst at 805-623-1106

Escape Online Shopping Cart Orders

The following vendors have been set up for Escape online shopping:

- Amazon - Vendor No. 001124
- CDWG - Vendor No. 001368
- Lakeshore Learning - Vendor No. 001400
- Office Depot - Vendor No. 001123
- School Specialty - Vendor No. 001373

An instructional guide on Escape shopping cart requisitions is provided in the Samples and Guides Tab in this manual, and may be located on the Contract & Procurement Services District webpage under the “Procedure Guides & Samples” dropdown tab.

Blanket Purchase Orders Guidance

A Blanket Purchase Order (BPO) is used for recurring orders, conference registration, travel expenses, and local shopping.

BPO Shipments to the Site or Warehouse

The Warehouse cannot formally receive items purchased with a Blanket Purchase Order (BPO) in the Escape system. When submitting BPO requisitions, set the order type to "Blanket PO".

BPO Confirmation of Receipt of Goods and Invoices

To process an invoice, the Accounts Payable Team needs confirmation from the requisitioner that all ordered items have been received and the invoice is approved for payment.

Receipts will be reviewed, and any items not authorized for purchase will need to be returned.

One-Day Event - Items

All items required for a single day or a specific event should go through the standard requisition process.

Single Item(s) with a value of $500

Single items with a value of $500 are considered assets and are prohibited from being purchased with a BPO and must be ordered through the standard PO process.

Spending Limits School Sites

Sites may not exceed the $1,000 limit for LCAP (Local Control Accountability Plan) and PINV (Physical Inventory) purchases.

General/Discretionary expenses, if a site needs to spend over the $3,000 limit, a new BPO should be created, provided that funds are available.

Spending Limits Service Areas

Individual supply BPOs may not exceed $10,000. If an additional or higher limit is needed, contact the Contracts & Procurement Service Area.

US Bank local shopping BPOs may be issued for up to the spending limit needed to support the program, event, or travel.

BPO for recurring payments tied to a contract may be issued for the expected expenditure for the current fiscal year.

Blanket Purchase Orders School Site - LCAP Funds

The following BPO methods are available utilizing LCAP funds. For additional information regarding LCAP funds and the use of BPOs, contact the Plan Alignment & Implementation Service Area.

Amazon Blanket Purchase Orders-LCAP

Amazon Blanket Purchase Orders (BPOs) replace the need to enter individual Escape Amazon Shopping Cart requisitions. The Plan Alignment & Implementation Service Area will establish the BPO threshold for LCAP-related Amazon BPO purchases. Once an Amazon BPO is set up, authorized users can directly create and submit shopping carts on the Amazon website.

The email-driven review and approval process for submitted Amazon website shopping carts expedites approvals, significantly reducing the timeline by several days when compared to the standard Escape shopping cart method.

Office Depot Blanket Purchase Orders-LCAP

Purchases are required to be in the site's SPSA and are for Emergency Office Supplies. BPO may not exceed the amount established by the Plan Alignment & Implementation Service Area for the current school year.

- Example: Goal 3.1f ~ BPO for emergency office supplies.

US Bank Blanket Purchase Orders-LCAP

Purchases are required to be in the site's SPSA. If using Site PINV funds, your site MUST use a specific goal for a PINV BPO. Typically used for snacks and supplies for Parent Engagement Meetings. BPO may not exceed the amount established by the Plan Alignment & Implementation Service Area for the current school year.

- Example: Goal 1.1c ~ BPO for Lite Snacks for Parent Meetings (ONLY)

Blanket Purchase Orders School Site - General Discretionary Funds

Amazon Blanket Purchase Orders - Discretionary Funds

Amazon Blanket Purchase Orders (BPOs) replace the need to enter individual Escape Amazon Shopping Cart requisitions. The BPO threshold for Amazon may not exceed the amount established by the Plan Alignment & Implementation Service Area for the current school year.

Once an Amazon BPO is set up, authorized users can directly create and submit shopping carts on the Amazon website.

The email-driven review and approval process for submitted Amazon website shopping carts expedites approvals, significantly reducing the timeline by several days when compared to the standard Escape shopping cart method.

Office Depot Blanket Purchase Orders - Discretionary Funds

Office Depot Blanket Purchase Orders (BPO) threshold for purchases may not exceed the amount established by the Plan Alignment & Implementation Service Area for the current school year.

Once an Office Depot BPO is set up on the Office Depot website, authorized users can directly create and submit shopping cart orders on the Office Depot website.

US Bank Blanket Purchase Orders - Discretionary Funds

US Bank Blanket Purchase Orders (BPO) threshold for purchases is up to $3,000. Once a US Bank BPO is set up, an assigned District credit card may be used to shop following the credit card procedures outlined in the credit card section of this handbook.

Blanket Purchase Orders Service Areas/Departments

Amazon Blanket Purchase Orders

Amazon Blanket Purchase Orders (BPOs) replace the need to enter individual Escape Amazon Shopping Cart requisitions. The BPO threshold for Amazon BPO purchases is up to $10,000. Once an Amazon BPO is set up, authorized users can directly create and submit shopping carts on the Amazon website.

The email-driven review and approval process for submitted Amazon website shopping carts expedites approvals, significantly reducing the timeline by several days when compared to the standard Escape shopping cart method.

Office Depot Blanket Purchase Orders

Office Depot Blanket Purchase Orders (BPO) threshold for purchases is up to $10,000. Once an Office Depot BPO is set up on the Office Depot website, authorized users can directly create and submit shopping cart orders on the Office Depot website.

US Bank Blanket Purchase Orders

US Bank Blanket Purchase Orders (BPO) threshold for purchases is up to $10,000. Once a US Bank BPO is set up, an assigned District credit card may be used to shop following the credit card procedures outlined in the credit card section of this handbook.

Amazon 3-Way Receiving

Amazon 3-Way Match is a tool that allows orders to be received directly in the Amazon platform. Using 3-Way Match will match your order, item receipt, and invoice. This eliminates the need for the Accounts Payable team to manually email each person who placed an order to confirm all items were received; therefore, streamlining the invoice processing much faster and more efficiently.

To learn how to receive orders on Amazon, refer to the "Samples and Guides" tab in this handbook. The same guide can also be found on the **Contract & Procurement Services District** webpage under the **Procedure Guides & Samples** dropdown menu.

Return of Merchandise

Standard PO Items (non-shopping cart orders)

Contact the Contracts and Procurement Service Area for assistance to return standard purchase order item(s). When emailing, include the following information:

- Purchase Order Number
- Item to be returned
- Reason for return

If the product is damaged, the vendor may require pictures of the damaged items. If the product is being returned due to an accidental purchase or no longer needing the item(s), the return may be subject to a restocking fee. The

item(s) to be returned will need to be sent to the District Warehouse or the Contracts and Procurement Service Area for processing.

Amazon Return Process

The Procurement Team does not have access to individual Amazon Accounts. To return an Amazon order, log into your Amazon account, find the order to be returned, and click on return item. **Choose "damaged item" as the return reason (even if the item is not damaged)**; the damaged designation is required for Amazon to issue a physical return label. All other return options will default to a QR code and instructions to take the item to a UPS center. Place the label on the item to be returned and send the item back to the Warehouse for shipping. Notify the Warehouse that the item is a return.

Office Depot Returns

The Procurement Team does not have access to individual Office Depot Online Accounts. To return an Office Depot order, log into your Office Depot account, find the order to be returned, and click "create a return" located in the top right corner. Select the item to be returned and the reason for the return. Choose the print a label option. Place the label on the item to be returned and send the item back to the Warehouse for shipping. Notify the Warehouse that the item is a return.

Rewards and Loyalty Cards

The use of personal rewards cards for District purchases is a conflict of interest and is prohibited.

Examples:

- Costco
- Vons
- Albertsons
- Kohl's
- Starbucks

Onsite Workshops – Assemblies – Professional Development Trainings

A fully executed Purchase Order and/or contract is required for all workshops, assembly speakers, professional development training, and similar services.

Contracting for services without a fully authorized Purchase Order in place may result in the employee personally being responsible for payment of the goods or services provided.

To request on-site services, enter a requisition and all supporting documentation into Escape. If the vendor requires a formal contract, the end-user must follow the Consultant/Contract review process. Plan accordingly to allow ample time (2-4 weeks) for the contracts process to be completed.

The Procurement Service Area will request certificates of insurance from the vendor and issue the Purchase Order.

Movie Showings on Campus - Licenses

A film as part of direct classroom curriculum instruction, entertainment-type films can be included as curriculum, can be shown without a license or permission under 17 U.S.C. § 110(1). An example of this would be showing Romeo and Juliet in an English class as part of the curriculum.

If the school or teacher shows these same films for entertainment or reward,or for a family engagement or after-school events, a license or permission is required. Examples of this are class parties, club activities, and student assemblies. The site will need to find an alternative way to reward or entertain students during these occasional events or to purchase a license to show the film.

Licensing for a one-time event may be purchased through Swank.com at the following link:

https://www.swank.com/k-12-schools/

Note: The movie itself can be obtained from any legal source (rental store, personal collection, streaming, etc). Swank does not provide the movie itself, just the license.

The event should not be advertised until the license has been secured. We need to verify that the movie you select is available to license, as studio changes can occur.

Bounce Houses and Party Rentals

Bounce Houses, Inflatables, and Equipment Rental

- Attraction shall be set up in a clear and flat space away from sharp objects or structures that could contribute to an injury
- Inflatables shall not be used in windy conditions
- Only Children from the same age group may participate at the same time in the attraction
- Slide height may not exceed 10 feet, as measured from the height of the platform to access the attraction to the surface below
- The highest designated play surface should not exceed 10 feet in accordance with the Consumer Product Safety Commission's

Public Playground Safety Handbook. The overall height of the structure itself can exceed 10 feet, as long as the highest platform does not exceed 10 feet.

- Inflatable rental equipment is limited to bounce houses, obstacle courses with no moving parts, and slides or climbing walls not exceeding 10ft. Bungee jump attractions, rock climbing walls, or mechanical rides are not permitted.
- Provide the SMBSD Standard Event Equipment Rental Agreement to the Vendor. The agreement is available on the Contracts & Procurement webpage under the forms tab.

Food Purchases SPSA and Department/Service Area Budgets

Federal Funds (Site and Departments/Service Areas)

No food, snacks, or drinks may be purchased with any Federal funds.

Title I Funds (Site and Departments/Service Areas)

No food, snacks, or drinks may be purchased with Title funds. Including Title II, III, and IV funds.

Title I PINV Funds (Site and Departments/Service Areas)

You may provide light refreshments as a way to encourage parents of Title I, Part A students to participate in school activities.

Light refreshments may include the following:

- Coffee
- Water
- Snacks NOT perishable

  Example:
  Store-bought pre-packaged food items.
  Note: Leftovers should be saved for another meeting.

LCAP (Sites)

- LCAP funds may only be used to purchase food for parent and family events. These funds may not be used for staff meetings, training, etc.

Light refreshments may include the following:

- Coffee
- Water

- Snacks NOT perishable

  Example:
  Store-bought pre-packaged food items.
  Note: Leftovers should be saved for another meeting.

- You need to have a set number of people you are purchasing for, and this amount needs to be included on the requisition.

- When you advertise your event, you can state that dinner will be served to the first [insert amount] people.

  Example: Dinner will only be served to the first 100 people.

- A BPO may not be used for vendors to cater or provide a food truck. You will need to create an itemized requisition. An itemized requisition requires you to list out what you are purchasing, the quantity you are purchasing, and the name of the event.

  When using a food truck or a catering company, please ensure all of the guidelines are met under the Food Truck and Catering section of this handbook.

General / Discretionary (Site)

- Food and snacks for students as an incentive.

  - Incentives may include a popsicle party, etc.

    Please note: These must go through Food Services to ensure selected items meet the non-compete agreement.

    To order celebration meals or for further information regarding celebration meals, contact the Food Services Department.

- Snacks for Staff and Engagement Meetings

- Food for Professional Learning Events (Back to School Week for Teachers/Staff)

    - Drinks may include soda, tea, and/or water
    - This may include plates, cups, water, etc.
    - All items need to be itemized on the requisition.

PTA or PTC (Site)

- Food or snacks for Teacher Appreciation Week/Day of the Teacher

- Food/Snacks/Drinks to Sell that are not in compliance with Smart Snacks Guidelines

    - Food/snacks cannot be sold **until 30 minutes after** the official end of the school day, **AND** cannot be involved or interfere with the ASP supper meals.

Note (Site)

- If your site does not have a PTA or PTC, you may use General/ Discretionary funds for Teacher Appreciation Week.

- Expenses need to be tied to an educational purpose, and for audit purposes, the wording on the requisition is very important.

- If you would like to provide more than light refreshments, such as a meal for parents, then the following guidelines must be followed:

Catering Companies/Food Vendors

Food Trucks

- The Food Vendor must provide proof of a **current Santa Barbara County Mobile Vending Food Truck Permit** and must be tied to a commercial kitchen.

    - If they will be cooking onsite, the Food Truck may not be near a building due to the propane tank.

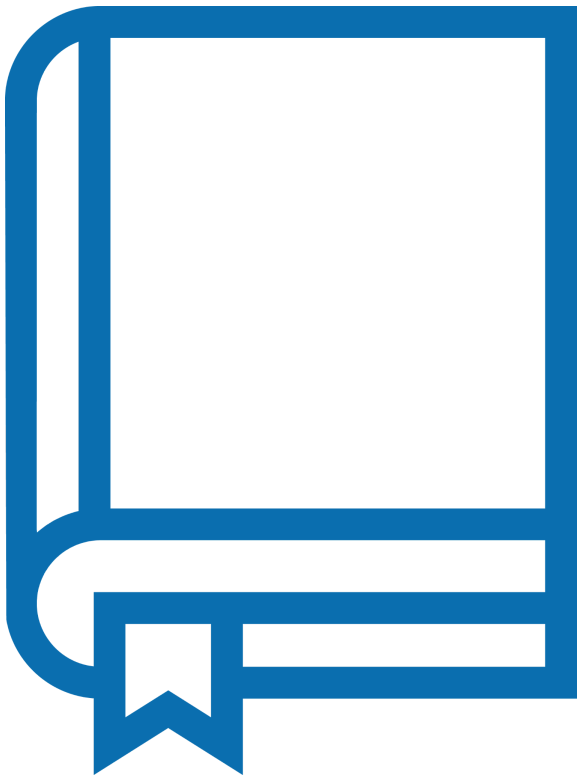
- If the vendor is a Food Truck, they may only be parked/set up in the parking lot or on the street. District grounds, fields, and blacktops are not rated to hold the weight associated with a food truck.

- **Note:** Permitting a large vehicle to drive and park on District property may cause damage to your playfields and/or blacktop areas.

- The Food Truck Vendor will need to provide Certificates of Insurance to the Purchasing Department. Please contact your Buyer for details.

- The Food Truck Vendor may not be a business associated with a direct District Staff member without first completing a consultant packet.

TAB 4



CONTRACT & AGREEMENTS PROCEDURES

Contract/Agreement Processing

To be valid and legally binding on the District, any contract or consultant agreement, regardless of its dollar value, must be approved or ratified by the School Board. This requirement is mandated by Education Code 17604, SMBSD Board Policy 3312, and SMBSD Board Policy 3600. This includes Consultant Agreements, Assemblies, Training, Independent Contractors, Party Rentals, Software Agreements, Field Trips & Bussing.

Specialized services (e.g., Financial, Legal, Design, and other Consulting Services which require a specialty license or certification) will require Board approval based on the contract value; however, they may be exempt from the Competitive Bidding Process. Please contact the Site/Service Area designated Buyer to discuss options.

The process below is based on state-funded procurements. If the procurement will be fully or partially funded using Federal Funds or Grants, contact the Site/Service Area designated Buyer, as additional steps will be required to be in compliance with Federal Procurement Regulations.

Any contract requiring a signature must go to the Board of Education for approval, as follows:

Contract Value $0.00 - $9,999.99

1. If required, route agreement/contract for Service Area/Budget Approval
2. Enter a requisition in Escape using the requisition type “CON”. Attach the agreement/contract to the requisition
3. Site/Service Area enters information into the Consultant and Contract Review Form
4. Purchasing will review and negotiate the agreement and request Certificates of Insurance if applicable
5. Purchasing will submit the agreement for signature execution, issue the PO, and services may start
6. Business Services will submit the agreement/contract to the Board on the Consent Agenda for Approval

Contract Value $10,000.00 - $49,999.99

1. If required, route agreement/contract for Service Area/Budget Approval
2. Enter a requisition in Escape using the requisition type “CON”. Attach the agreement/contract to the requisition
3. Site/Service Area enters information into the Consultant and Contract Review Form
4. Purchasing will review and negotiate the agreement and return a copy to the Site/Service Area

5. Business Services will submit the agreement/contract to the Board on the Consent Agenda for approval.
6. Board Approval is Required prior to Signature Execution
7. Purchasing will request Certificates of Insurance and process the agreement for signature execution.
8. Purchasing will issue the PO, and services may start.

Contract Value $50,000.00 - $114.799.99

1. If required, route agreement/contract for Service Area/Budget Approval
2. Enter a requisition in Escape using the requisition type “CON”. Attach the agreement/contract to the requisition
3. Site/Service Area enters information into the Consultant and Contract Review Form
4. Purchasing will review and negotiate the agreement and return a copy to the Site/Service Area
5. Business Services will submit the agreement/contract to the Board on the Action Agenda for approval.
6. Board Approval is required prior to Signature Execution
7. Purchasing will request Certificates of Insurance and process the agreement for signature execution
8. Purchasing will issue the PO, and services may start

Contract Value $114.800.00 +

1. Contact the Purchasing Service Area to review the scope of services. If services are exempt from competitive bidding, the process will follow the same procedure as processing a contract with a value under $114,800. If the services are not exempt, then a Formal Bid Process is required, and the following steps are applicable.
2. Purchasing will work collaboratively with the Site/Service Area to develop a bid timeline, prepare a scope of work, establish evaluation criteria, and assign an evaluation committee of 3 to 5 Staff Members to evaluate and score all proposals.
3. At the conclusion of the bidding and scoring process, the highest-ranked Bidder/Firm will be recommended to the Board for the award of a contract.
4. Business Services will prepare the Board item for placement on the Action Agenda for approval.
5. Site/Service Area enters a requisition in Escape using the requisition type “CON”.

6. Board Approval is required prior to Signature Execution.

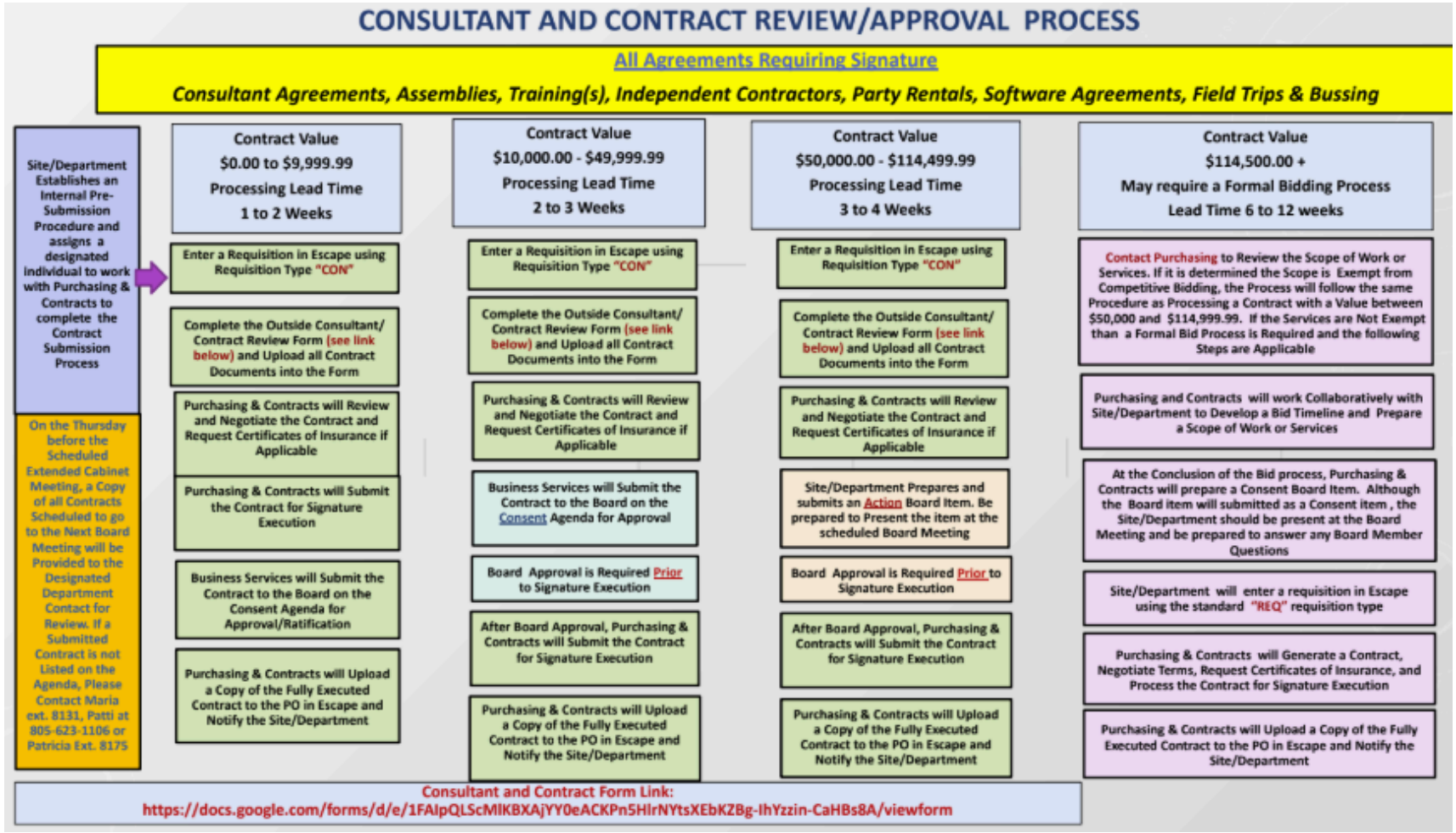
7. Purchasing will generate an agreement, negotiate terms, request Certificates of Insurance, and process the agreement for signature execution.

8. Purchasing will issue the PO, and services may start

To submit a contract or consultant agreement for Board consideration and approval, please fill out and upload the document using the following link:

https://docs.google.com/forms/d/e/1FAIpQLScMlKBXAjYY0eACKPn5HlrNYtsXEbKZBg-IhYzzin-CaHBs8A/viewform

Insert Flow Chart



TAB 5

DISTRICT CREDIT CARD PROCEDURES
&
STATEMENT RECONCILIATION

District Credit Card Use and Reconciliation

All purchases made using a District credit card must comply with District procurement policy guidelines. Although credit cards are issued in an employee's name, they are linked to the District. Personal staff information is not shared with U.S. Bank and is not used in the approval process, so there is no impact on the employee's personal credit profile. To request a credit card in a staff member's name, please email the designated Buyer for your site or Service Area.

General Information

- Before using a District-issued credit card, the cardholder must have a signed user agreement on file with the Procurement Service Area.
- A fully executed PO to US Bank must be in place prior to making a purchase
- Credit cards will not be activated until the day the cardholder plans to shop. To activate a credit card, contact Purchasing with the PO number, the amount needed for the purchase, and the required shopping/travel dates. Email activation requests to purchasing-team@smbsd.net
- Always keep the credit card in a safe and secure place when it's not in use.
- To pick up a credit card at the Contracts & Procurement office, the credit card holder is required to provide a fully executed copy of the purchase order.
- Online purchases are generally prohibited and must be made through the Procurement office. This includes sites like eBay, Costco.com, and Walmart.com.

  Exceptions for online purchases include:

  - Conference Registration
  - Hotel Reservations
  - Transportation (Rental Car – Airfare)
  - Software Licenses
  - Field Trip Venue – Tickets
  - Food/Catering for Events - **Service Tip not to exceed 15% or no more than $50.00,** unless the service fee is mandatory by the vendor

Credit Card Reconciliation

Credit card statements must be reconciled within seven (7) business days of receipt. The Cardholder is responsible for reviewing all charges to ensure accuracy and for providing complete supporting documentation. Required documentation includes the business purpose of the purchase (e.g., meeting agenda, attendance sheet, or flyer) and a copy of the related purchase order for each transaction. The reconciliation statement must be signed by both the Cardholder and the Site Principal or Service Area Administrator.

Reconciliation must adhere to all cutoff dates to avoid interest or late fees. Any interest or late charges incurred due to late statement reconciliation will be charged back to the site or the Service Area's budget.

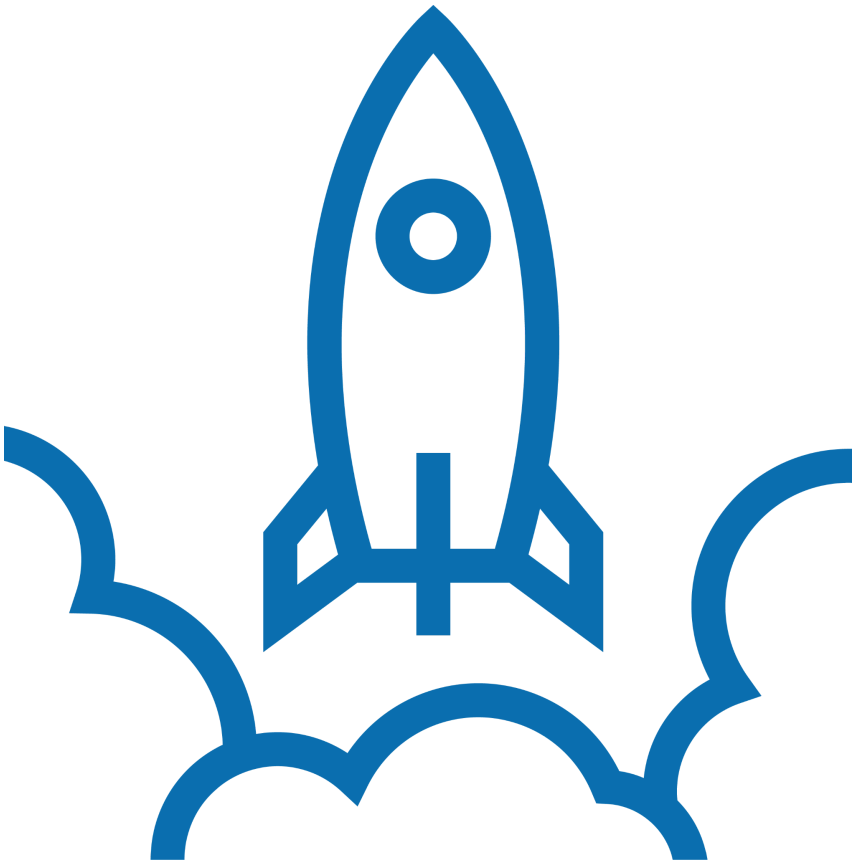
Credit card privileges may be suspended if the Credit Card Statement Reconciliation is not submitted within 30 days. Privileges will remain suspended until all overdue reconciliation statements are received.

Lost Credit Card Receipt

For lost credit card receipts, complete and submit the lost receipt affidavit form with the credit card statement. Submitting an affidavit of lost credit card receipt five or more times within a fiscal year may result in the suspension of credit card privileges.

The Lost Receipt Affidavit form is available on the Business Services website under the “Forms” dropdown tab.

TAB 6



TRAVEL GUIDANCE

Travel Procedures

District travel exceeding a 75-mile radius from the District office may be approved for overnight travel, including lodging, transportation, and meal allowance. A Conference Attendance and Reimbursement Form must be completed at least ten days prior to the travel date.

Lodging Options

Upon lodging check-in, a personal credit card will be required for any incidental charges. When checking out of the hotel, audit the hotel receipt carefully and correct any discrepancies.

Hotel

To reserve a hotel stay using the District Credit Card, a fully executed Purchase Order is required.

The District will cover hotel fees and parking only for approved travel dates. The Traveler is responsible for all other charges, including internet and meals.

When using ridesharing or another form of transportation to arrive at the hotel, confirm that the hotel receipt does not include a parking charge.

Airbnb Stays

When staff members are traveling together, an Airbnb can be a viable option, provided its total cost does not exceed the combined cost of individual hotel rooms for the same duration. Please be mindful of additional charges such as non-refundable fees and cleaning fees, as these can significantly impact the overall price. The Site or Service Area Administrator must approve the use of an Airbnb.

Transportation Options

The Site or Service Area Administrator will determine the approved form of transportation. This decision may be based on the available travel funding and the option considered most economical.

For example, administrators may weigh the cost of personal vehicle mileage against a rental car. Similarly, an administrator may require a single rental car for multiple travelers attending the same event, rather than incurring the cost of multiple rental cars.

Rental car

For district business trips exceeding 75 miles round-trip, a rental car is an option. Follow the "Reservation and Rental Process" for booking.

A standard-size vehicle can be reserved for 1-4 travelers, while a minivan is available for 5 or more. SUV rentals are not covered unless pre-approved by the sponsoring Site or Service Area Administrator.

When multiple people will be driving, ensure all drivers are listed on the reservation, as only registered individuals may operate the vehicle.

- Visit **www.enterprise.com** to make a reservation. Use the SMBSD corporate code: **DB30J14**. When prompted, enter the first three letters of the district's name: **SAN**. Choose the vehicle and make a reservation. If more than one traveler is in the vehicle, make sure all drivers are listed on the reservation. ***The additional Collision Damage Waiver offered by the rental car company must be declined.***

- In Escape, submit a requisition to **U.S. Bank [Vendor #008465]**. This requisition can combine car rental fees, fuel, conference registrations, and hotel reservations. Remember to include a separate line for estimated fuel expenses, calculated as follows:

  Fuel cost = (Estimated Round Trip Miles / 25 MPG) * $4.75 per gallon.

  *Example: (450 Miles / 25 MPG) * $4.75 = $85.50*

- Before the trip:

  District Issued Credit Card Stored at the Procurement Service Area

  If the traveler's District-issued credit card is stored at the Procurement Service Area, ***bring a copy of the fully executed PO to the Procurement Service Area*** **and pick up the assigned credit card.** The credit card will be activated for the specific travel dates and approved amounts.

  After the trip, all receipts for credit card expenses are to be submitted to the Procurement Service Area. On or around the 25th of the month following travel, the traveler will receive a request via SignNow to verify and sign the credit card statement, confirming all charges are correct.

District Issued Credit Card Stored at the site or Service Area

If the traveler's District-issued credit card is stored at the site or Service Area, email **purchasing-team@smbsd.net** to request activation for travel.

The Activation request must include:

- **PO number**
- **Travel start and end dates**
- **The highest swipe limit needed** (typically for hotel fees)
- **Total dollar amount needed**

The purchasing team will then activate the credit card for the specific travel dates and approved amounts.

After the trip, keep all credit card receipts. On or around the 25th of the month following the travel, the traveler will receive a copy of the credit card statement and a request from SignNow to provide all receipts, verify that the charges are correct, and sign the credit card statement.

Personal Vehicle

When approved by the Site or Service Area Administrator, the traveler may use a personal vehicle for official District business travel.

Mileage reimbursement will be calculated based on the round-trip distance from the Souza Center or assigned site to the event and back. The current District standard mileage rate will be used in calculating the reimbursement. This rate covers fuel, oil, tires, and general wear and tear on the vehicle. When using a personal vehicle, the District credit card may not be used for fuel, as this cost is already included in the mileage reimbursement amount.

The traveler is solely responsible for all other expenses related to their personal vehicle.

To file a claim for personal mileage reimbursement, use a District Conference and Reimbursement Request Form. This form can be found on the District's website under Service Areas> Business Services> Travel & Conference.

Ridesharing

The Site or Service Area Administrator, at their discretion, may require multiple travelers attending the same event to rent a larger vehicle and ride-share. This helps optimize costs and logistics.

If a traveler prefers not to ride-share in this scenario, they may have the option to use a personal vehicle for the event. However, the District will not provide reimbursement for mileage or other associated costs if this option is chosen over the Administrator's ride-share requirement.

Airline or Train

The Site or Service Area Administrator, at their discretion, may authorize Airline or Train transportation. This decision will consider available travel funding and which mode of transportation is most economical.

When traveling by Airline or Train, travelers must select the most economical form of ground transportation from the terminal or station to their hotel. If the hotel provides a complimentary shuttle service from the terminal, the traveler is required to use it.

Taxi

The District Credit Card may be used for Taxi charges when free shuttle services are not an option. Driver tips should not exceed 15%.

Shuttle

The District Credit Card may be used for Shuttle charges when free shuttle services are not an option. Driver tips should not exceed 15%.

Public Bus Transportation

The District Credit Card may be used for Public Bus Transportation charges when free shuttle services are not an option.

Uber/Lyft

The District Credit Card may **not** be used for Uber or Lyft rides. A Traveler may choose to use this service if they use a personal credit card to book and pay for the ride. A traveler may submit a receipt for reimbursement for Uber or Lyft on the Conference Attendance and Reimbursement Form, located on the Business Services website - Forms. Driver tips may not exceed 15%.

TAB 7

BID LIMITS & PROCUREMENT TYPES

State of California Bid Limits

Goods and Services

The bid limit for 2024 is $114,800 per single purchase or annual aggregate per vendor. Goods and Services may not be split into smaller orders to circumvent the bid process. The aggregate amount applies to all district-wide purchases combined.

The Procurement Service Area will conduct a formal bid process for all procurements valued at over $114,800. For procurements under $114,800, the site or Service Area shall provide and upload a written quote into Escape. Request for bids may not contain proprietary products or a specific brand without offering an “equal” opportunity for consideration of alternative products.

Professional Services

Professional Services, advice, and insurance services may be exempt from competitive bidding.

Federal Bid Limits

If utilizing Federal Funds or Grants, please contact the Contracts & Procurement Service Area.

Additional procurement steps are required to ensure compliance with Federal Procurement Regulations.

- Micro Purchase - annual aggregate up to $10,000
- Small Purchase (Informal) - annual aggregate up to $250,000 - SMBSD is required to follow the most restrictive bid requirements, and at $114,500, SMBSD defaults to the State bid threshold.
- Large Purchase (Formal) - annual aggregate exceeding $250,000
- Sole/Single Source Procurements
- Professional Services -unlike some State funding mechanisms, Federal procurement regulations generally **do not allow a broad competitive bidding exception for professional service contracts**.

Piggyback Bids

Public Contract Code 20118 permits public entities to procure products or services by leveraging an existing contract established by another public entity (often referred to as a "piggyback" contract).

If the Site or Service Area is considering the use of a Piggyback contract, please contact the Contracts & Procurement Service Area. Before any use, the viability of the piggyback contract must be confirmed by Procurement, and a Consent Board Item must be presented to the SMBSD Board of Education for approval.

To be considered valid, a piggyback contract must be accompanied by the following documentation from the originating public entity:

- The original contract.
- Documentation of their board approval for the original contract.
- A clause within the original bid or contract explicitly stating its availability for piggybacking.

Legal Requirements for Public Works Contracts

The District participates in the Uniform Public Construction Cost Account Act, Public Contract Code 2200, which raises the bidding thresholds for informal public works bids to $75,000 and bidding thresholds for Formal bids to $220,000.

Public works

- Construction, alteration, demolition, installation, or repair work done under a contract requiring a contractor's license and is paid in whole or in part out of public funds.
- It can include preconstruction and post-construction activities related to a public works project.
- Modular furniture installation (cubicles)
- Painting of Murals
- Blind Installation
- Marquee/Electronic Scoreboard

Legal Requirements

- All contracts for construction above $1,000 are subject to prevailing wages.
- Public Works projects above $25,000 require a Payment Bond

- Public works projects above $75,000, subject to Public Contract Code Section 22033
- Legal Advertisement once a week for two weeks
- Formal Bid Process
- Requires a Bid Bond
- Requires a Payment and Performance Bond
- Additional mandated certifications
- Project awarded to the lowest responsive-responsible bidder

TAB 8

OBSOLETE EQUIPMENT & SUPPLIES PROCESS FURNITURE

Obsolete Equipment, Supplies & Instructional Materials

All District surplus is processed in accordance with Education Code 60510, 60510.5, and SMBSD Board Policy 3270.

Computer Equipment

Computer equipment and IT-related items are processed by Information Technologies on behalf of the site/Service Area.

Instructional Materials

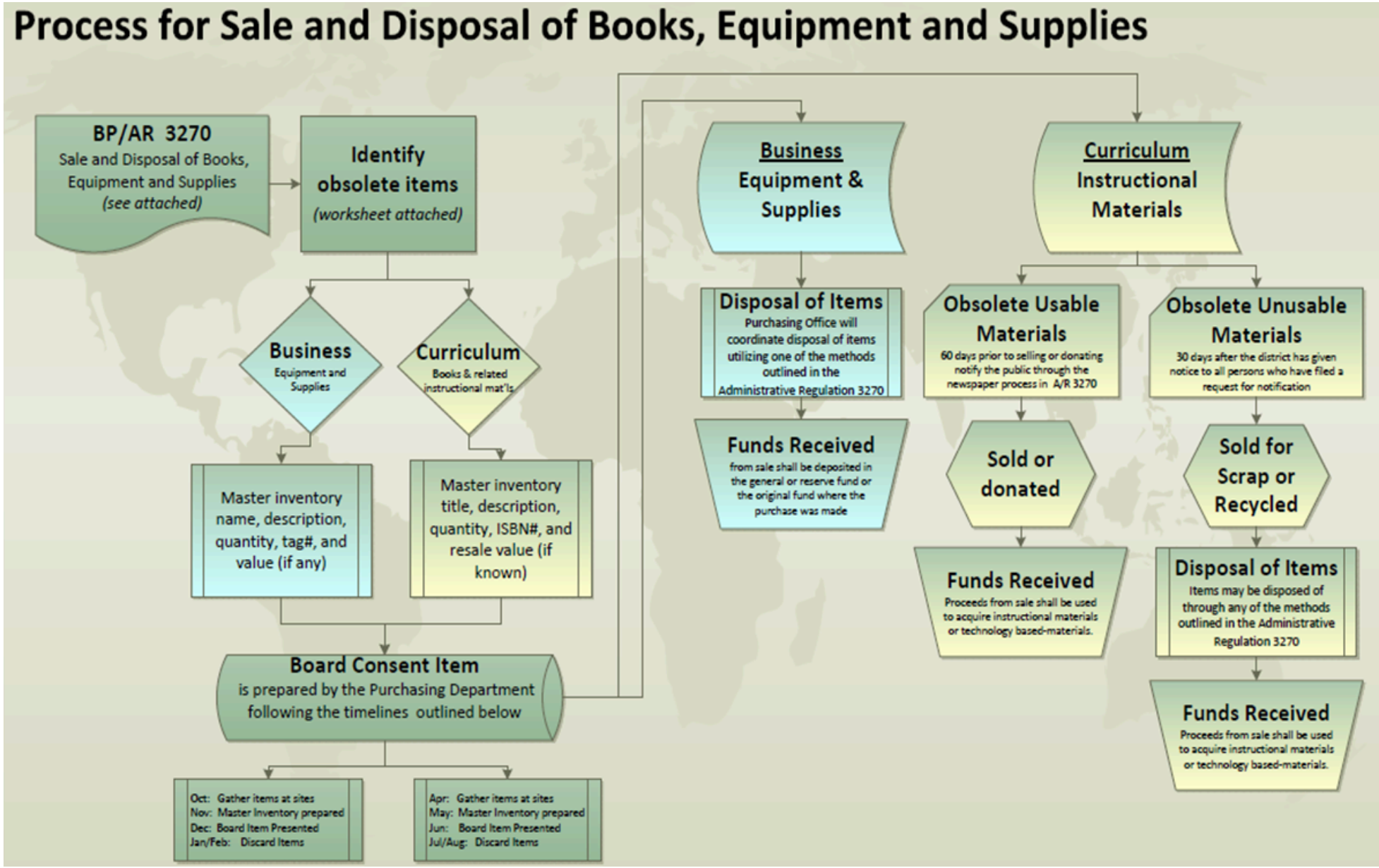
Site obsolete instructional materials, contact Teaching and Learning for assistance with submitting the obsolete materials for processing.

Miscellaneous Obsolete Items

Any item with an asset tag is required to be deemed obsolete by the Board of Education. To submit items for consideration, complete the obsolete items form located on the Contract & Procurement Services District webpage under “Contract & Procurement Forms”.

The Contracts and Procurement Service Area will add the obsolete items to the monthly board agenda for approval. Once the Board has approved the items, arrangements will be made for the items to be removed from the site and recycled or sent to auction.

Process for Sale and Disposal of Books, Equipment and Supplies



Site Furniture

Growth Furniture

Schools can request furniture to accommodate projected growth. Before placing new orders, Purchasing will collaborate with Student Housing and Attendance to verify that the requested furniture aligns with the District's growth projections. Our first step is to relocate excess furniture from other sites to fulfill these growth needs.

To request growth furniture, please complete the Growth Order Form located on the Contract & Procurement Services District webpage under “Contract & Procurement Forms”.

Site Funded Classroom Furniture

Sites may choose to fund alternative student furniture. Example: changing standard student desks to tables. Please note the following regarding site-funded student furniture:

- If the furniture being replaced can not be rehomed to another site, it will need to be stored on your site, as the district warehouse has limited space to store extra furniture.
- The district will not provide growth funds to replace furniture if the site reverts to its original configuration.
- Student Furniture may not be purchased from Amazon - Contact the Contracts & Procurement Team for a list of approved student furniture vendors.
- Cabinets or shelving exceeding 5ft are prohibited from being installed in a classroom.

Complete New Classroom Setup TK & K

Teaching and Learning coordinates all TK and Kindergarten classroom furniture needs. For any TK or K furniture requests, please contact the Teaching and Learning Service Area.

Complete New Classroom Setup 1 – 8 Grade

New Classroom Setup - Space Conversion to Classroom:

To order a complete classroom setup for a space that has not previously been a classroom, select all items on the form related to the grade level needed and submit the form.

To request furniture, please complete the new classroom setup form located on the Contract & Procurement Services District webpage under “Contract & Procurement Forms”.

New Classroom Setup - Existing Classroom New Grade Level:

If converting an existing classroom into a new grade level, only select those items on the form that may be missing to support the new grade level for that classroom.

To request furniture, please complete the new classroom setup form located on the Contract & Procurement Services District webpage under “Contract & Procurement Forms”.

Purchasing will pull furniture from another site with excess furniture to fulfill growth needs before placing new orders for furniture.

Stand Up Desk and Special Furniture for Staff

All orders for standing desks require approval from the Risk Management Supervisor (RMS).

Before entering a requisition for a standing desk in Escape, email the Risk Management Supervisor (RMS). Risk will perform an informal assessment to determine if a full ergonomic workstation assessment is necessary.

Once the RMS has approved the request, be sure to include the following information in the requisition notes:

- Note in the requisition comments: Approved by RMS on Date of Approval
- Upload a copy of the RMS approval email to the requisition in Escape.

Flexible Student Furniture – Site or Supplemental Funds

Per the District’s liability insurance provider, flexible student furniture cannot be purchased from Amazon due to limitations in third-party seller liability coverage.

For assistance with this type of purchase or for a list of approved providers and products, please contact the Site/Service Area designated Buyer.

Outdoor Furniture

Before submitting a requisition for outdoor furniture, please contact the Maintenance & Operations (M&O) Service Area. M&O

will assess the requested furniture to ensure it meets ADA standards and properly fits within the proposed space.

- Note in the requisition comments: "Approved by M&O on Date of Approval
- Upload a copy of the M&O's approval email to the requisition in Escape.

Damaged Furniture

District furniture comes with a 10-year warranty for the replacement of defective items. If a manufacturer determines that the furniture is defective within this warranty period, it will be replaced at no cost.

When considering broken furniture for replacement, we look at:

- Normal wear and tear
- Student damage or defacement
- Manufacturer defects
- Existing warranty issues

Cosmetic damage or the age of the furniture alone does not qualify it for removal or replacement.

To report damaged furniture, please complete the form located on the Contract & Procurement Services District webpage under "Contract & Procurement Forms".

Excess Furniture

The District Warehouse does not have storage space for unused or excess furniture. Here are some options for managing excess furniture:

- Ask the site custodian to assess the current classroom furniture. If there is furniture in poor condition, swap it with excess items and submit the damaged furniture for disposal or recycling through the damaged furniture process.
- To report excess furniture, please complete the form located on the Contract & Procurement Services District webpage under "Contract & Procurement Forms".

Special Education Furniture For Staff & Students

Special Education Teachers

Furniture to support Special Education Teachers and Contract Staff assigned to School Sites is the responsibility of the Site.

Special Education Students

Specialized furniture and equipment needed to support Special Education students will be evaluated and purchased by the Special Education Service Area.

Health Services Equipment and Furniture

Furniture to support District Staff and Contracted Health Staff assigned to School Sites is the responsibility of the Site. Some Contracted Staff, as part of their contract, may provide equipment and furniture.

Special Health Equipment for Students

Specialized health-related furniture and equipment needed to support Special Education students will be evaluated and purchased by the Special Education Service Area.

Souza Center Furniture

Stand Up Desk for Staff

All orders for standing desks require approval from the Risk Management Supervisor (RMS).

Before entering a requisition for a standing desk in Escape, email the Risk Management Supervisor (RMS). Risk will perform an informal assessment to determine if a full ergonomic workstation assessment is necessary.

Once RMS has approved the request, be sure to include the following information in the requisition notes:

- Note in the requisition comments: Approved by RMS on Date of Approval
- Upload a copy of the RMS approval email to the requisition in Escape.

TAB 9

INSURANCE REQUIREMENTS & CERTIFICATE OF INSURANCE SAMPLE

CERTIFICATE OF INSURANCE

The District has a responsibility to protect its students, staff, and community, as well as to safeguard public resources. One important way of fulfilling this responsibility is by requiring Certificates of Insurance (COIs) from all vendors, contractors, and service providers who do business with the District.

A Certificate of Insurance serves as formal proof that a vendor or contractor maintains the appropriate insurance coverage as required by District policy, contracts, and state law. This documentation verifies that the vendor carries coverage such as general liability, automobile liability, workers' compensation, or professional liability, depending on the nature of the work or service being provided. Without this verification, the District could be exposed to significant financial risk in the event of accidents, property damage, personal injury, or other unforeseen incidents connected to a vendor's activities.

Requiring COIs also ensures that the District is not inadvertently assuming the liabilities of its vendors. In addition to managing risk, collecting Certificates of Insurance supports compliance and accountability. Vendors who maintain proper insurance demonstrate financial responsibility and a commitment to safe and professional operations. By consistently collecting and reviewing COIs, the District ensures that all providers meet the same standard of protection, which promotes fairness and transparency in procurement and contracting.

Requiring Certificates of Insurance is a legal contractual safeguard and is a best practice that protects the District's resources and ensures the continuity of services in support of students and the educational mission.

The Contracts and Procurement Staff is responsible for collecting COIs for goods, services, and formal bids.

Certificates of Insurance Guidance:

CERTIFICATES OF INSURANCE	
Volunteer on Campus	A volunteer coming on the campus to provide assistance or a presentation to a classroom (career day, etc). A Certificate of Insurance is not required unless the presentation carries a degree of risk
Vendor working on Campus	Example: Installation of an item purchased, such as mini-blinds or furniture. A Certificate of Insurance is Required
On-site Presentation by Vendor or Non-Profit Organization	A Certificate of Insurance is required for all on-site presentations
On-site Consultant/Training Sessions	A Certificate of Insurance is required for all on-site presentations
Web/Zoom Training	A Certificate of Insurance is Not Required
School District or Office of Education	Several School Districts and Offices of Education are part of the same insurance as SMBSD, and we will not require a Certificate of Insurance from any agency that is part of the same insurance provider. Purchasing will verify before issuing the purchase order.
On-site Governmental Agency – State, Police, Fire, Animal Control, Parks & Recreation - Presentations	A Certificate of Insurance is required for all onsite presentations.
Off-site Field Trip Community Venue	Example: Boomers, PCPA, Movie Theaters, Zoo, etc. - A Certificate of Insurance is not required
Off-site Field Trip Governmental Agency	Example: State Offices, Police Station, Animal Control, Parks & Recreation - A Certificate of Insurance is not required
Off-site Field Trip School District or Office of Education	Example: Track meet at another School District - A Certificate of Insurance is not required
Party Rental	Bounce House, Tables & Chair Rental - A Certificate of Insurance is required. Inflatable rental equipment is limited to bounce houses, obstacle courses with no moving parts, slides, and inflatable climbing walls not exceeding 10ft. Bungee jump attractions, rock climbing walls, mechanical rides, or attractions that encourage competition, such as jostling or racing, are not permitted.

Certificates of Insurance Coverage Required:

Independent Contractor shall acquire and maintain at his/her own expense all insurance described below. All insurance shall remain in full force throughout the term of the Agreement. A sample Certificate of Insurance is provided on the next page reflecting the required insurance coverages and endorsements, including:

General Liability Insurance - for injuries, including accidental death.

Minimum combined single limit per occurrence in an amount not less than $1,000,000.00 and $2,000,000 aggregate.

Automobile Liability - Required or Certification Letter stating that the Vendor will park off-site

Minimum combined single limit $1,000,000.00

Workers Compensation -

$1,000,000 or the current state requirements

Clauses Required on all Insurance Certification Types:

An Additional Endorsement and Waiver of Subrogation is required on all policies and shall designate the following:

- Thirty (30) Day prior written Policy Cancellation notice required
- The Santa Maria-Bonita School District, Board Members, Officers, Officials, Employees, Authorized Representatives, Agents, and Volunteers are named as additional insureds.

Additional Insurance Coverages Required for specific service types:

Professional Liability - Service Contracts - Contracted Staffing

Minimum combined single limit per occurrence in an amount not less than $1,000,000.00 and $2,000,000 aggregate. Limits may be increased due to the complexity or potential risk of the project or event.

Sexual Abuse and Molestation (SAM) Coverage - Any Vendor or Contracted Staffing that has direct contact with Students, in person, virtual, or through telecommunication devices.

Minimum combined single limit per occurrence in an amount not less than $1,000,000.00 and $2,000,000 aggregate.

CERTIFICATE OF INSURANCE SAMPLE

ACORD®

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME: Insurance Contact Name
Insurance Agency/Broker 111 A Street Santa Maria CA 93455	PHONE (A/C, No, Ext): (000) 000-0000 FAX (A/C, No): (000)000-0000 E-MAIL ADDRESS: Insurance Contact Email Address

INSURED	INSURER(S) AFFORDING COVERAGE	NAIC #
Vendor/Consultant 111 B Street Santa Maria CA 93455	INSURER A: Indemnity Insurance Comapany	12345
	INSURER B: Acme Auto	23456
	INSURER C: Property & Casualty Insurance Company	34567
	INSURER D:	
	INSURER E: NOTE: All Insurance Companies listed above must have an	
	INSURER F: A.M.Best rating of no less than "A VII"	

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	GENERAL LIABILITY X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE X OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: POLICY PRO-JECT LOC				mm/dd/yy	mm/dd/yy	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	$ 1,000,000 $ $ $ $ 2,000,000 $
B	AUTOMOBILE LIABILITY X ANY AUTO ALL OWNED AUTOS SCHEDULED AUTOS HIRED AUTOS NON-OWNED AUTOS				mm/dd/yy	mm/dd/yy	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$ 1,000,000 $ $ $
	UMBRELLA LIAB OCCUR EXCESS LIAB CLAIMS-MADE DED RETENTION $						EACH OCCURRENCE AGGREGATE	$ $
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y / N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N / A		mm/dd/yy	mm/dd/yy	WC STATU-TORY LIMITS OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	$ 1,000,000 $ 1,000,000 $ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

Event Title and Date: _____

Additional Endorsement and Waiver of Subrogation is required and shall designate:

Thirty (30) Day prior written notice of cancellation is required.

The Santa Maria-Bonita School District, Board Members, Officers, Officials, Employees, Authorized Representatives, Agents and Volunteers are named as additional insured(s). The certificate covers all schools for the Santa Maria-Bonita School District for the school year through summer school to 8/1/2026 (or when the certificate expires).

CERTIFICATE HOLDER	CANCELLATION
Santa Maria-Bonita School District 708 S. Miller Street Santa Maria CA 93454	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. Thirty (30) Day prior written notice required AUTHORIZED REPRESENTATIVE

TAB 10

SAMPLES & GUIDES

See Tab in the Contracts & Procurement Webpage