

**INSTRUCTIONS FOR COMPLETING
REQUEST FOR PROCUREMENT ACTION (RFPA) FORM**

The “Request for Contract Action” (RFCA) previously utilized is now replaced with a new form named “Request for Procurement Action” (RFPA). The RFPA will be utilized for professional services **and** supplies, equipment and general services. **An RFPA must be completed for all professional services at or above \$25,000 and for supplies, equipment and general services at or above \$78,900.**

You may complete the RFPA online on the PSD website: <http://psd.lausd.net/>. **However, please note that you must save the RFPA and then print the RFPA since you cannot submit electronically. In addition, you must obtain the required approvals on the hardcopy.** For assistance completing the RFPA, please contact PSD at the Centralized Customer Service at (562) 654-9009.

Upon completion of the RFPA, please submit request to:

Procurement Services Division
8525 Rex Rd.
Pico Rivera CA 90660
Fax (562) 654-9047

SECTION I	CLIENT/CONTRACT SPONSOR – Enter the information of the school/office requesting the procurement action.
SECTION II	<p>ACTION REQUESTED – Please check the box that applies to your request.</p> <ol style="list-style-type: none"> 1. Create New Contract/PO – Check this box, if you are requesting to create a new contract or purchase order. 2. Amend Contract – Check this box, if you have an existing procurement contract or purchase order (PO) that is still in effect and you need to (a) extend the time period to complete the service; (b) increase the amount of the existing contract/purchase order; and/or (c) make changes to the procurement contract/purchase order. 3. Exercise Option/Extension - Check this box, if you are exercising an option to the contract/purchase order. 4. Terminate Contract – Check this box, if you are requesting to terminate a Contract/PO. A partial funding reduction is not considered a contract termination. You shall consult with PSD for recommendations prior to any termination action request. Notification to contractor of contract/PO termination without PSD coordination is prohibited. On a separate page, please provide a detailed justification for termination request, including the termination date. 5. RX/Funds Only – Check this box if you are providing funding only for a preexisting contract’s continuing period of performance. (Example: Year Two of a Two-Year Contract, etc.)
SECTION III	<p>Contract or Amendment Term (Date) and Value (Dollar) – Please include the contract number, if you have a contract number already assigned, and include the start date and end date. For amendments to existing contracts, include the original start date and indicate the anticipated end date.</p> <p>Amount (Not to Exceed) – Enter contract amount (or provide an estimate if PSD will conduct the RFP/IFB). Enter the increase or decrease in contract amount, if applicable, for an amendment. If exercising an option, enter the amount of the option.</p>

SECTION IV

Funding – Funding information is required for all procurement contract(s)/PO’s. Indicate whether an override was utilized to pass an RX. Also indicate, whether you are utilizing Federal or Grant funds.

Please indicate if Federally Funded. If ARRA funded (any of these program codes), please indicate. Requests for these Program Code and Program Name require additional policy and procedure for processing.

Program Code	Program Name
G094	NCLB:ARRA T1- CENTRAL OFFICE
2166	ARRA CHILD NUTR: EQPT ASST GRT
2167	ARRA SPED: EXP FR GF CONTR
2162	ARRA SPED: IDEA BASIC LOC ASST
2165	ARRA SPED: IDEA PRESCH LCL ENT
2164	ARRA SPED: IDEA PRESCHOOL GRNT
2163	ARRA STATE FSCL STABILIZATION
G129	ARRA-WIA SUMMER YOUTH EMPLOY
V129	ARRA-WIA SUMMER YOUTH EMPLOY
0M83	CE EIA-ED'L DISADNTG-CONT-ARRA
T094	NCLB:ARRA T1- PRIVATE SCH
V094	NCLB:ARRA T1-A LOW INC&NEGLCTD
0V94	NCLB:ARRA T1-A LOW INC&NEGLCTD
09V4	NCLB:ARRA T1-A LOW INC&NEGLCTD
G137	NCLB:ARRA-TX MCKINNEY-VENTOHOM
V137	NCLB:ARRA-TX MCKINNEY-VENTOHOM
G139	OTHER ARRA PROG EARLY HEADSTA
V139	OTHER ARRA PROG EARLY HEADSTA
V151	OTHER ARRA PROG-WATTS/WEP DW
V152	OTHER ARRA PROG-WATTS/WEP YTH
G140	OTHER ARRA PROGRAMS-HEAD START
V140	OTHER ARRA PROGRAMS-HEAD START
G105	SPED:ARRA IDEA,PARTB-611PRESCH
V105	SPED:ARRA IDEA,PARTB-611PRESCH
G106	SPED:ARRA IDEA,PARTB-619PRESC
V106	SPED:ARRA IDEA,PARTB-619PRESC
G109	T2D-EETT ARRA GRANT FY09-10
V109	T2D-EETT ARRA GRANT FY09-10
G100	WIA-YTH ACTIVITIES-ARRA-STIMUL
V100	WIA-YTH ACTIVITIES-ARRA-STIMUL

Please attach a requisition (RX) for the requested services either online or through the Job Cost Accounting. Enter the requisition number on the RFPA

Professional Services Only: If the RX is done online, the following document numbering formula should be used: TRANS = RX, AREA = ___ DOCUMENT NUMBER = CS#. Use Commodity Code 9610200000 and for an estimated value over \$100,000, use dummy vendor code 000000 when doing the RX.

Supplies, Equipment or General Services: If the RX is done online, the following document numbering formula should be used: TRANS = RX, AREA = ___ DOCUMENT NUMBER = Location Code -#. (For example, PSD’s area and location codes are 3M6 and 0538. The document numbering would be RX 3M6 0538-#).

<p>SECTION V</p>	<p>DOLLAR THRESHOLD REQUIREMENTS. Please check the box on the RFPA and attach the necessary documentation based on the dollar threshold. The dollar threshold should be within the “Amount (not to exceed)” indicated in Section III Contract or Amendment Term and Value.</p> <p>Professional Services For Professional Services, check the appropriate box and attach the additional documents as indicated. Professional Services are services that involve consulting, advising, and performance of a particular service. For additional information, contact PSD.</p> <ol style="list-style-type: none"> 1. \$25,000 up to the State Competitive Bid Limit (\$78,900): you must attach Scope of Work, (3) quotes, and other documents supporting selection. You will select the vendor based on the three quotes you received and indicate the suggested vendor in section VI. Suggested Vendor Information for Professional Services Only. If under \$25,000, please utilize PDCS in IFS for low-dollar purchases. 2. At or above the State Competitive Bid Limit (\$78,900) up to \$100,000: you must attach Scope of Work, proposals/pricing and selection criteria. Proposals/Pricing shall include the vendors contacted and price quoted to perform the service. You will select the vendor based on the proposals received and indicate the suggested vendor in section VI. Suggested Vendor Information for Professional Services Only. 3. Over \$100,000 up to \$250,000: you must attach Scope of Work, Evaluation Criteria, and minimum requirements for the vendor. PSD will conduct informal competition. 4. Over \$250,000: you must attach Scope of Work, Evaluation Criteria, and minimum requirements for the vendor and a summary which shall include: (i) statement regarding Board Options and Consequences, (ii) Policy Implications Statement, and (iii) Selection of the Guiding Principles, nos. 1-5 in the instructions. PSD will conduct Request for Proposal (RFP). <p>Purchasing For supplies, equipment and general services check the appropriate box and attach the additional documents as indicated. Supplies, equipment and general services are tangible items such as, but not limited to, equipment, automotive parts, school supplies, and general services such as maintenance service of equipment for example copier repair related services, armor car services or laundry service. For additional information, contact Procurement Management Branch.</p> <ol style="list-style-type: none"> 1. \$25,000 up to the State Competitive Bid Limit (\$78,900): you must submit a fully funded requisition. 2. At or above the State Competitive Bid Limit (\$78,900) up to \$250,000: you must submit a fully funded requisition along with product/technical specifications, approved RFPA form and any supporting documentation. PSD will conduct an Invitation for Bid (IFB) that is opened under seal at a pre-determined date. 3. Over \$250,000: you must submit a fully funded requisition, approved RFPA form along with product/technical specifications, any supporting documentation and Informative for Board review. The Informative shall include background on suggested award, details of usage and funding. <p>Please refer to the Procurement Manual or PSD website at http://psd.lausd.net for additional information regarding the above requirements.</p>
<p>SECTION VI</p>	<p>Suggested Vendor Information – For Professional Services only, when selecting Dollar Thresholds in section V. numbers 1-2, please include the suggested vendor.</p>

SECTION VII**OPERATIONAL ACTION PLAN TENET (FOR PROFESSIONAL****SERVIES ONLY) – On the RFPA, select the Core Strategies that applies to your request.**

- 1) Using Data to Drive Standards Based Instruction
- 2) Supporting All Employees
- 3) Budgeting for Student Achievement
- 4) Creating and Supporting Quality Schools

SECTION VIII

Required Signatures – You must obtain the appropriate approvals as indicated below. Appropriate signatures of approval are required for all transactions at or above \$25,000 as indicated below. Please ensure that you secure the appropriate signatures.

Approvals:	
General Stores Warehouse	Principal/Department Head for amount ordered from Warehouse.
Master contract/agreement	Principal/Department Head for amount ordered of a Master contract/agreement.
Piggyback Contract	Principal/Department Head to request a Piggyback Contract.
Dollar Threshold:	
\$1 - \$1,500	Approving Official, if P-Card. If P-Card not available, use PD CS or PD LV, Principal/Department Head
Over \$1,500 up to \$25,000	For Professional Services: PD CS: PEND 1 Approval by Principal/Department Head For Supplies, Equipment and General Services: PD LV: PEND 1 Approval by Principal/Department Head
Over \$25,000 and above	For Schools: Principal & Local District Superintendent For Offices: Department Head and Senior Staff Obtain appropriate signatures on the RFPA.
Over \$250,000	For Professional Services Only: Additional approval required by Superintendent

For a contract over \$78,900 or an amendment that increases the total amount to more than \$78,900, advance Board approval is required. The contractor may not perform services until the contract or amendment has been approved by the Board of Education and executed by PSD.

Senior Staff Approvals applicable to supplies, equipment, general and professional services:

Location	Approval
School based Employees	Local District Superintendent
Facilities Division	James Sohn
Operations Divisions	Wendy Macy
Financial Division	Megan Reilly
Instructional Division	Judy Elliott
Executive Management	Michelle King
Local District Employee	Michelle King
Personnel Commission	Ann Young-Havens
Adult Education	Ed Morris

Additional Approvals Required:

Additional Approvals Required Based on procurement for:

- Health Services rendered to students and Healthy Start Programs approval required by Student Health and Human Services
- All structural changes such as, but not limited to, temporary or permanent fixture installation that require drilling hole(s) onto school/office walls, electrical work, etc., for example, mounting of television projector, white boards, and mural paintings require the approval of Maintenance & Operations
- Technology systems, services, software and hardware require the approval of Information Technology Division
- Automobile/vehicle purchases approval required by Transportation Branch Fleet Maintenance Services
- Chemicals, cleaning supplies, various equipment (pressure washers, floor care machines, gardening machines, saws, kilns, golf carts, etc.), electric maintenance vehicles, and other items that may pose a safety hazard to students, teachers and District staff require approval of the Office of Environmental Health & Safety

SECTION IX

You must check the box that applies (if any) and provide the additional documentation as requested for those with asterisk. Please visit <http://psd.lausd.net> for additional documentation required.

1. ****Is this contract initiated through the Board or Superintendent? – If you select this box, you must be prepared to support that the request is being initiated by the Board or Superintendent and obtain the signature of the Board or Superintendent. Please visit <http://psd.lausd.net/> for additional documentation required.**
2. Does this contract involve a local education agency, other than LAUSD? – Select this box, if the request is for an educational agency at the local level which exists primarily to operate schools or to contract for educational services? Supporting documentation must be submitted with the RFPA.
3. Is this a contract for special education for nonpublic schools? – Select this box, if this request is for a nonpublic school that provides special education to school-age children as an alternative to public schools.
4. Is this a contract with an approved state mandated service provider? – Select this box, if this request is for a service provider that is state mandated in a State grant or Federal grant.
5. Is this a contract for perishable food? Select this box, if this request is for food items that may perish without immediate distribution, such as fruit, vegetables, etc.
6. ****Is this a Single Source? Select this box, if this request is for single source. A single source is a vendor specifically selected amongst other vendors, due to specific reasons, i.e. replacement**

	<p>parts, compatibility, quality, service, support, etc. PSD will verify that the request is valid and adequately falls under this category. Please review the Procurement Manual for additional information. Please visit http://psd.lausd.net/ for additional documentation required.</p> <p>7. **Is this a Sole Source? Select this box, if this request is for sole source. Sole source is a non-competitive purchase or procurement process accomplished after soliciting and negotiating with only one source. Please review the Procurement Manual for additional information. Please visit http://psd.lausd.net/ for additional documentation required.</p> <p>8. **Is this for an emergency? Select this box if this is an emergency. Please visit http://psd.lausd.net/ for additional documentation required.</p> <p>9. Is this for textbooks, other than State Adopted District Approved?</p> <p>10. Is this a contract for the exchange of household appliances and equipment belonging to the District and used for instructional purposes for new property of like class and kind for a similar use?</p> <p>11. Is this for work performed by day laborers that do not exceed 750 hours with cost of materials not exceeding \$21,000?</p> <p>12. Is this for lease of data-processing equipment, purchase or materials, supplies, equipment, automotive vehicles, tractors, and other personal property?</p> <p>13. Is this a federally funded project? Please see Section IV above, for instructions if ARRA funded.</p>
<p>PAGE 2</p>	<p>Page 2 of the RFPA (Applies to Professional Services and General Services only) —Complete and Accurate Submittal of this Form is Required and Mandatory for each Contract or Amendment Request. (Please see Page 2 for detailed instructions on providing the following information.)</p> <ol style="list-style-type: none"> 1. Expected Outcomes/Deliverables 2. Program Outcome Evaluation 3. Outsourcing Justification 4. Program Name(s)

Request for Procurement Action (RFPA)

PSD Use Only: Contract/RFP/IFB No: _____ Amendment No: _____

Please read the attached instructions and complete all information.

Section I: Client/Contract Sponsor School/Office: _____ Location Code: _____ Local Dist: _____ Requisition No.: _____ Date: _____ Contact Person: _____ Title: _____ Telephone: _____ Fax: _____ Email Address: _____ Brief Description of Service/Work: _____																																		
Section II: Action Requested: <input type="checkbox"/> 1. Create New Contract/PO <input type="checkbox"/> 2. Amend Contract <input type="checkbox"/> 3. Exercise Option Year? Yes ___ No ___ <input type="checkbox"/> 4. Terminate Contract <input type="checkbox"/> 5. RX/Funds Only	Section IV: Funding: Override used to pass RX? ___ No ___ Yes Federally Funded? ___ No ___ Yes (If Yes, check if Title I used ___) ARRA Fund: _____ Grant Funded? (Attach Grant/Grant Letter) ___ No ___ Yes Exp. Date of Grant: _____ General Funds? ___ Yes ___ No	Section V: Dollar Threshold Requirements. Please review the instruction for the necessary attachment(s). Check the box that applies. PROFESSIONAL SERVICES: <input type="checkbox"/> 1. Over \$25,000 to below the Competitive Bid Limit (\$78,900) <input type="checkbox"/> 2. At or above State Competitive Bid Limit up (\$78,900) to \$100,000 <input type="checkbox"/> 3. Over \$100,000 up to \$250,000 <input type="checkbox"/> 4. Over \$250,000 PURCHASE OF SUPPLIES, EQUIPMENT & GENERAL SERVICES: <input type="checkbox"/> 1. At or above State Competitive Bid Limit (\$78,900) up to \$250,000 <input type="checkbox"/> 2. Over \$250,000																																
Section III: Contract or Amendment Term and Value: Contract No. _____ Start Date: _____ End Date: _____ (If Amendment, enter original start date and new end date.) Amount (Not to Exceed) \$ _____ (If Amendment, enter amount of increase/decrease. If No-Cost or Time Extension, only enter "0".)		Section VII: Eqt g'Ut cvgi lgu (Applies to Professional Services Only) Please select only one (1) of the four(4) Core Strategies: <input type="checkbox"/> 1. Using Data to Drive Standards Based Instruction <input type="checkbox"/> 2. Supporting All Employees <input type="checkbox"/> 3. Budgeting for Student Achievement <input type="checkbox"/> 4. Creating and Supporting Quality Schools																																
Section VI: Suggested Vendor Information for Professional Services Nos. 1-2 in Section V. Vendor Name: _____ Contact Person: _____ Address: _____ Phone: _____ Fax: : _____ Email: : _____ Non-Profit? ___ Yes ___ No Will vendor provide services/products on school campus? ___ Yes ___ No		Section IX: Please check those that apply to your request. Those with asterisk require additional documentation, please visit http://psd.lausd.net under Forms. <table border="1" style="width:100%; border-collapse: collapse; margin-top: 5px;"> <tr> <td style="width:20px; text-align: center;">√</td> <td>Please check those that apply:</td> </tr> <tr> <td></td> <td>** (1) Is this contract initiated by the Board or Superintendent?</td> </tr> <tr> <td></td> <td>(2) Does this contract involve a local education agency?</td> </tr> <tr> <td></td> <td>(3) Is this a contract for special education for nonpublic schools?</td> </tr> <tr> <td></td> <td>(4) Is this a contract with an approved state mandated service provider</td> </tr> <tr> <td></td> <td>(5) Is this a contract for perishable food?</td> </tr> <tr> <td></td> <td>** (6) Is this a Single Source request?</td> </tr> <tr> <td></td> <td>** (7) Is this a Sole Source request?</td> </tr> <tr> <td></td> <td>** (8) Is this an emergency?</td> </tr> <tr> <td></td> <td>(9) Is this for textbooks, other than State Adopted District approved?</td> </tr> <tr> <td></td> <td>(10) Is this for contracts of like kind and quality?</td> </tr> <tr> <td></td> <td>(11) Is this for use of day laborers?</td> </tr> <tr> <td></td> <td>(12) Is this for lease of data-processing equipment, purchase or materials, supplies, equipment, automotive vehicles, tractors, and other personal property?</td> </tr> <tr> <td></td> <td>(13) Is this a Federally Funded project? If ARRA funds, please see Section IV.</td> </tr> <tr> <td></td> <td> </td> </tr> <tr> <td></td> <td> </td> </tr> </table>	√	Please check those that apply:		** (1) Is this contract initiated by the Board or Superintendent?		(2) Does this contract involve a local education agency?		(3) Is this a contract for special education for nonpublic schools?		(4) Is this a contract with an approved state mandated service provider		(5) Is this a contract for perishable food?		** (6) Is this a Single Source request?		** (7) Is this a Sole Source request?		** (8) Is this an emergency?		(9) Is this for textbooks, other than State Adopted District approved?		(10) Is this for contracts of like kind and quality?		(11) Is this for use of day laborers?		(12) Is this for lease of data-processing equipment, purchase or materials, supplies, equipment, automotive vehicles, tractors, and other personal property?		(13) Is this a Federally Funded project? If ARRA funds, please see Section IV.				
√	Please check those that apply:																																	
	** (1) Is this contract initiated by the Board or Superintendent?																																	
	(2) Does this contract involve a local education agency?																																	
	(3) Is this a contract for special education for nonpublic schools?																																	
	(4) Is this a contract with an approved state mandated service provider																																	
	(5) Is this a contract for perishable food?																																	
	** (6) Is this a Single Source request?																																	
	** (7) Is this a Sole Source request?																																	
	** (8) Is this an emergency?																																	
	(9) Is this for textbooks, other than State Adopted District approved?																																	
	(10) Is this for contracts of like kind and quality?																																	
	(11) Is this for use of day laborers?																																	
	(12) Is this for lease of data-processing equipment, purchase or materials, supplies, equipment, automotive vehicles, tractors, and other personal property?																																	
	(13) Is this a Federally Funded project? If ARRA funds, please see Section IV.																																	
Section VIII: REQUIRED SIGNATURES: Principal/Dept. Head: _____ Date: _____ (Signature) (Print Name & Title) Local Dist. Sup.: _____ Date: _____ (Signature) (Print Name & Title) Senior. Staff: _____ Date: _____ (Signature) (Print Name & Title) Sup. Office: _____ Date: _____ (Signature) (Print Name & Title) (Signature from the Superintendent's Office required only for professional services above \$250,000) Other Approvals: _____ Date: _____ (Signature) (Print Name & Title)																																		

**LOS ANGELES UNIFIED SCHOOL DISTRICT
PROCUREMENT SERVICES GROUP**

Complete and accurate submittal of this form is required and mandatory for each Contract or Amendment request. In completing this form, please use complete words—no acronyms, e.g., “PD” for “Professional Development,” “HPS” for “High Priority School;” no abbreviations, e.g., “Sch” for “School,” and no substitution of symbols in place of words, e.g., “&” for “and,” “@” for “at,” etc.

1. Expected Outcomes/Deliverables:

Use this section to concisely describe the Statement of Duties and/or Scope of Work and Deliverables. (Please limit your response to 180 characters, inclusive of spaces and punctuation.)

2. Program Outcome Evaluation:

Use this section to concisely describe how you will evaluate the success of the expected outcomes. (Please limit your response to 180 characters, inclusive of spaces and punctuation.)

3. Outsourcing Justification:

Use this section to concisely describe why this work cannot be undertaken by District staff. (Please limit your response to 180 characters, inclusive of spaces and punctuation.)

4. Program Name this Contract Supports:

Use this section to identify the name of the Program that will be supported by this contract or amendment and its expenditure. The full name is required—**please do not use any abbreviations, or acronyms.** For example, if this contract or amendment supports ELL, write in English Language Learners, etc.
