



# TRACKING SHEET FOR AGREEMENTS/CONTRACTS/MOUs/GRANTS

<b>DOCUMENT PACKET = 1 Tracking Sheet, 1 GLBS Report, 1 Board Agenda Item Cover Sheet, 2 Agreement/Contract/MOU/Grant documents</b> <i>Note: Ultimate approval is at the discretion of the Superintendent/President and/or Governing Board.</i> <b>Work is not to begin before the document has been signed by both parties.</b>			
❖ <b>Originator</b> please retain a copy of the Document Packet until a fully signed copy is received by email	❖ <b>All Grants</b> must be processed through Elizabeth Flores, Budget & Grants Accountant (ext. 6983)		
❖ <b>All Agreements/Contracts/MOUs/Grants</b> must be submitted to Governing Board (see <a href="#">Bid Matrix</a> , on next page)	❖ <b>All Grant Applications</b> require Governing Board <u>Approval</u> (see <a href="#">Bid Matrix</a> , on next page)		
<b>Contract Start Date</b>		<b>Contract End Date</b>	
<b>Date Submitted to G.B.</b>		<b>Submission Type</b>	<input type="checkbox"/> ACTION <input type="checkbox"/> CONSENT
<b>Contractor and Contractor's Contact Info</b> (Contact Name, Title, Organization, and Mailing Address, City, State, ZIP)		<b>Hartnell Originator / Phone</b>	<b>STATUS</b>
			<input type="checkbox"/> NEW <input type="checkbox"/> RENEWAL
<b>TYPE OF CONTRACT</b>	<input type="checkbox"/> Consultant Agrmt. <input type="checkbox"/> Independent Contractor <input type="checkbox"/> Performer/Lecturer Agrmt. <input type="checkbox"/> Vendor Agrmt. <input type="checkbox"/> Amendment to existing/active Agrmt. <input type="checkbox"/> Service Agrmt.		
<b>CONTRACTOR STATUS</b>	Prev. Employee: if so which <input type="checkbox"/> Faculty <input type="checkbox"/> Staff <input type="checkbox"/> Retired Contractor is a member of: <input type="checkbox"/> Cal-STRS <input type="checkbox"/> CalPERS		
<b>Description of Project or Service Being Performed</b>			
<b>Contractor's Phone/Email</b>		<b>Email</b>	
<b>Is this a new vendor?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No		

*\*If yes, please follow New Vendor Setup Guidelines*

<b>Budget Implication</b>		<b>Revenue</b>	\$	<b>Expense</b>	\$
<b>Fund Source</b>	<b>GRANT?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<b>Grant Type</b>	<input type="checkbox"/> Federal	<input type="checkbox"/> State <input type="checkbox"/> Local
<b>Budget Account Code(s)</b>			%		%

*\*Attach a copy of a Colleague GLBS report for each budget account code (GL#) being used.*

<b>1. Preliminary Review:</b>	Administrative Services	Date
<b>2. Review &amp; Approval:</b>	Controller / or / Grants Accounting Manager	Date
<b>3. Review &amp; Approval:</b>	Dean / Dept. Manager / Director (printed name: _____ )	Date
<b>4. Review &amp; Approval:</b>	Area Vice President (printed name: _____ )	Date
<b>5. Final Review &amp; Approval:</b>	Vice President of Administrative Services	Date

*Administrative Services use only:*

Certificates of Insurance:	<input type="checkbox"/> Yes <input type="checkbox"/> No	Additional Insured?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Originals to President for signature:	Date: _____	Fully executed copy to Originator:	Date: _____
Originals to Contractor for signature:	Date: _____	Fully executed copy to Contractor	Date: _____

**COMPLETE**

# BIDDING PROCEDURES MATRIX

## HARTNELL COMMUNITY COLLEGE DISTRICT

<b>CONSTRUCTION PROJECTS</b> (per UPCCAA)	Min Quotes	Board Action	Prevailing Wage *5	Bid Bond *2	Payment Bond *1	Liability Insur. Cert.	Auto Insur. Cert.	Remarks
Projects under \$1,000	1	CA	N	N	N	Y	Y	PO, RFP, or proposal
Projects \$1,000 to \$14,999 *5	2	CA	Y	N	N	Y	Y	PO, RFP, or proposal
Projects \$15,000 to \$24,999 *2 *3	2	CA	Y	N	N	Y	Y	PO, RFP, or proposal
Projects \$25,000 to \$45,000 *1 *3	2	CA	Y	Y	Y	Y	Y	PO, RFP, or proposal
Projects \$45,001 to \$175,000 *4 *6 *9	Bids	CA	Y	Y	Y	Y	Y	Informal bidding per UPCCAA
Projects \$175,001 and larger *8	Bids	BPA	Y	Y	Y	Y	Y	Formal bidding w/advertisement per UPCCAA
<b>NON-CONSTRUCTION</b> Equipment, Materials, Services, etc.								
Purchases of \$0 to \$5,000 *10 *11 *12	1	N/A	N	N	N			1 quote required, 2 recommended
Purchases of \$5,001 to \$20,000 *10 *11 *12 *13	2	N/A	N	N	N			2 written quotes (catalog/internet OK)
Purchases of \$20,001 to \$90,200 *6 *10 *11 *12* 13	3	N/A	N	N	N			Informal RFQ w/3 written quotes
Purchases of \$90,201 or more *6 *7 *10 *11 *12 *13	Bids	BPA	N	N	N	Y- Contractor	Y- Contractor	Formal RFP, specs, advertisement, Bid bond 5% optional by the CEO

**CA** = Board Consent Agenda approval required, CBO/CEO may approve contract/agreements prior to Board Approval

**BPA** = Action requires Board prior approval to execute agreements and contracts

**N/A** = Not applicable; Superintendent/President authorized to approve

**\*1** = Per California Civil Code 3247, all projects \$25,000 or more require a payment bond

**\*2** = Per California Public Contract Code 20651(b), all construction contracts \$15,000 or more require a bidders bond

**\*3** = Per Uniform Public Construction Cost Accounting Act, projects up to \$45,000 may be done by force labor, negotiated, or PO

**\*4** = Per Uniform Public Construction Cost Accounting Act, projects up to \$45,000 to \$175,000 may be bid by Informal Bidding. This amount is subject to Periodic Adjustments per Public Contract Code (PCC) section 20651(a)(d), as noticed by the California Community College System Office

**\*5** = Per Labor Code 1771, all project of \$1,000 or more shall require prevailing wages be paid and meeting requirements of Labor Code

**\*6** = Amount is subject to Annual Adjustments per Public Contract Code (PCC) section 20651(a)(d), as noticed by the California Community College System Office

**\*7** = HCCD Board approval required for purchase/agreement over \$90,200 in order to execute an Agreement

**\*8** = HCCD Board approval required for any purchase/agreement over \$175,000 in order to execute an Agreement

**\*9** = If all of the informal bids received exceed \$175,000, project may still be awarded to lowest bidder, up to a maximum of \$187,500 per section 20651(a)(d)

**\*10** = Unless a California Multiple Award Schedules (CMAS) contract has been approved by the District

**\*11** = Per Labor Code section 1720, some furniture installation contracts also require prevailing wages

**\*12** = Under PCC 20651(a), bidders must give "such security as the Board requires," typically either a bid bond, cash, cashier's check, or certified check

**\*13** = Sole Source Justification



## TRACKING SHEET PROCESS

