REQUISITION CHECKLIST

Use this checklist as a guide to compile the details and documentation needed to submit a requisition.

GOODS (Purchase Order)

Requestor Attachments to submit with requisition based on price of order.

$0.01 - $1,000 PO N/A

- ☐ 1 Informal Quote

$1,001 - $25,000

- ☐ 2 Written Quotes **or** Purchasing Exception

$25,001 - $50,000

- ☐ 3 Written Quotes/Proposals **or** Approved Purchasing Exception

$50,001 - $75,000 (Purchasing Will Enter Requisition)

- ☐ 3 Formal Requests for Bids/Proposals via PlanetBids **or** Approved Purchasing Exception

$75,000 + (Purchasing Will Enter Requisition)

- ☐ Approved Board Memo
- ☐ Approved Board Minutes

PLEASE NOTE:

- **All sole-source purchases, agreements or task orders in the amount of $10,000 or more require a GM signature approval.**

SERVICES (PURCHASE ORDER and/or AGREEMENT)

Requestor Attachments to submit with requisition based on price of order.

$0.01 - $1,000 PO N/A

- ☐ 1 InformalQuote

$1,001 - $25,000

- ☐ 2 Written Quotes **or** Purchasing Exception

$25,001 - $50,000

- ☐ 3 Written Quotes/Proposals **or** Approved Purchasing Exception
- ☐ Fully Executed Agreement

$50,001 - $75,000 (Purchasing Will Enter Requisition)

- ☐ 3 Formal Request for Bids/ Proposal **or** Approved Purchasing Exception
- ☐ Fully Executed Agreement

$75,001 + (Purchasing Will Enter Requisition)

- ☐ 3 Formal Request for Bids/ Proposal via PlanetBids **or** Approved Purchasing Exception
- ☐ Fully Executed Agreement
- ☐ Approved Board Memo
- ☐ Approved Board Minutes

PLEASE NOTE:

- **All services should be accompanied by approved certificates of insurance with endorsements.**
- **All sole-source purchases, agreements or task orders in the amount of $10,000 or more require a GM signature approval.**

CONSTRUCTION & PUBLIC WORKS

Requestor Attachments to submit with requisition based on price of order.

$0.01 - $1,000 PO N/A

- ☐ 1 Informal Quote
- ☐ Check A License - CSLB

$1,001 - $15,000

- ☐ 2 Written Quotes **or** Purchasing Exception
- ☐ Task order or agreement, with payment and performance bonds if applicable, over $10,000
- ☐ Check Contractors - DIR Services
- ☐ Check A License - CSLB

$15,001 - $25,000

- ☐ 2 written Quotes **or** Approved Purchasing Exception
- ☐ Task order or agreement, with payment and performance bonds if applicable
- ☐ Check Contractors - DIR Services
- ☐ Check A License - CSLB

$25,001 - $50,000

- ☐ 3 written Quotes **or** Approved Purchasing Exception
- ☐ Task Order or Agreement, with Payment and Performance Bonds, If Applicable
- ☐ Check Contractors - DIR Services
- ☐ Check A License - CSLB

$50,001 - $75,000 (Purchasing Will Enter Requisition)

- ☐ Formal Request for Bid (PlanetBids)
- ☐ Check Contractors - DIR Services
- ☐ Check A License - CSLB
- ☐ Fully Executed Contract (with Performance/Payment Bonds)

CONSTRUCTION & PUBLIC WORKS

Requestor Attachments to submit with requisition based on price of order.

$75,001+ (Purchasing Will Enter Requisition)

- ☐ Formal Request for Bid via PlanetBids
- ☐ Check Contractors - DIR Services
- ☐ Check A License - CSLB
- ☐ Fully Executed Contract (with Performance/Payment Bonds)
- ☐ Board Memo
- ☐ Board Minutes

PLEASE NOTE:

- **All services should be accompanied by approved certificates of insurance with endorsements.**
- **All sole-source purchases, agreements or task orders in the amount of $10,000 or more require a GM signature approval.**

QUICK LINKS

Insurance	PlantBids > Purchasing | PlanetBids - Insurance Certificates
Board Memo & Minutes	Download the Board Memo & Minutes related to your contract agreement from the Board approved meetings. | MEETINGS | West Valley Water District
CSLB Number	CA Contractors State License Board | Check A License - CSLB
Department of Industrial Relation	Click the license number to confirm expiration date and scroll down to "Public Works Contractors Registration Search" | CA Department of Industrial Relations website Contractors - DIR Services
Single / Sole Source Justification Form	Request form from Support Services
Systems of Award Management Gov	Purchasing will check for Debarment | Home | SAM.gov