



Contract Approval Process

For Consultant/Vendor Services

1. Faculty, staff, administrator wants a product or service

2. Administrator determines cabinet level point person

3. Is it a recurring contract or new initiative?

Recurring contract

Assess for effectiveness to district goals

New initiative

Assess for alignment to district goals

4. Determine if RFP, quote or bid is needed *(See Purchasing Exhibit table attached for assistance)*

YES *(Supervised by cabinet)*

1. Issue RFP or obtain quote or bid
2. Evaluate based on predetermined criteria
3. Determine vendor, verify general conditions on attached Purchasing 6700 contract provisions and Part 200 Appendix II contract provisions

NO

Proceed to step #5

**5. a. Supervisor/designee prepares recommendation memo if RFP was completed in Step 4
b. Supervisor/designee submits proposed contract to Data Protection Officer for review**

6. Initiate contract

All items above must be submitted for a complete contract package:

1. Vendor proposal
2. Prepare contract package
 - Convert to CSDA contract template or vendor contract
 - Contract cover sheet
 - Complete exhibit B of contract (meas. results)
 - Fingerprinting
 - Insurance
3. Vendor signature

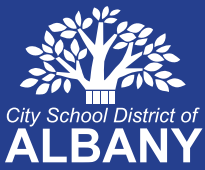
Purchasing Department Centralized Quality Control (CQC) is responsible for:

- Verify review for completeness
- Verify quotes, bid, SOW in RFP
- Follow up on missing info
- Retain permanent file on all contracts
- Assure insurance requirements are met
- Submit to asst. supt. for approval

7. Board clerk initiates the contract administrative approval and legal review process

1. Asst. supt. approval ► **2.** Supt. review and approval ► **3.** Legal review

**8. a. Board clerk submits to BOE for approval
b. Board clerk submits signed/approved contract to Purchasing Department for contract management and payment process**



Contract Approval Procedures

For Consultant/Vendor Services

Checklist for Contracts

- ☐ Authorization by administrator to proceed with contract or new initiative
- ☐ Determine if an RFP, quote, or bid is required (as per Purchasing Exhibit)
- ☐ Issue RFP if necessary, obtain quotes or bids if necessary
- ☐ Consult M/WBE website for vendors that are qualified to participate and send invitation if applicable
- ☐ Evaluate RFP, quote or bid
- ☐ Completion of recommendation memo (only if there is an RFP)
- ☐ Prepare the contract package for submittal to the Purchasing Department
 - ☐ CSDA contract template signed by vendor
 - ☐ CSDA contract coversheet (2-page)
 - ☐ Recommendation memo (if an RFP was issued)
 - ☐ Quotes (if obtained)
 - ☐ Include insurance document if necessary
 - ☐ Include fingerprinting forms (required if more than 5 days of direct student contact under the age of 21)
- ☐ Submit the complete package to the Purchasing Department

When can the insurance requirement be waived?

Generally, the District would like to obtain proof of insurance from all parties. Professional, full-time consultants and nonprofit organizations are always required to provide insurance.

In certain situations, we have individuals performing limited services for the school district for small amounts of money (under \$3,000) who are not full-time consultants. For example, a retiree may help with costume design for \$600, or someone may teach a single evening course for adults. In these cases, we don't expect the individual to acquire a \$1 million insurance policy to earn a relatively low amount of money with us.

Timing of submittal of contracts to the Purchasing Department

There have been on-going issues whereas the Board is asked to approve contracts after the fact. In some cases, contracts have been 8 to 9 months late.

The revised Contract Submittal Form now requires an explanation when contracts are submitted to the Board after the start date.

For planning purposes, the complete contract package should be submitted to the Purchasing Department at least 4 – 6 weeks in advance of the services beginning.

If an RFP is required, you will need to assume an additional 6 weeks of lead time on your end to complete the process on time.

Are Contracts Needed for Every Service?

Generally the answer is yes.

However for services under \$10,000 to be performed over a short period of time (less than 6 months) and with a low frequency of deliverables (5 or less contracts with the District), than a detailed proposal or quote can suffice in place of a contract.

For example, if we wanted to purchase advertising on CDTA buses up to 5 ads at \$200 each. In this case, a detailed quote sheet from CDTA will suffice to assure both parties have something in writing that indicates what will be provided and what it will cost.

In other situations, a contract may not be required but it is in the District's best interest to have a contract to assure that a service is "locked-in." An example of this would be hiring a consultant to help with the props for the high school play. The total amount may be less than \$1,000 but the District wants a binding contract to assure the vendor is committed a few months before the play activities begin.