



BULLETIN

SUBJECT: Contract Approval and Routing Form **2019-20 NO. BS - 31**
TO: All School Sites and Departments
DATE: March 2, 2020
PREPARED BY: Jessica Sulli **DEPARTMENT:** Contracts Office
Contract Specialist
REVIEWED BY: Dan Sanchez **APPROVED:** 
Manager, Purchasing Rose F. Ramos,
Services Chief Business Officer

The attached **Contract Approval and Routing Form** is part of a new process for reviewing and approving contracts prior to signature by the District's Board delegated signer. The Contract Approval and Routing Form will streamline and provide more accountability to the contract approval process.

The Contract Approval and Routing Form should be used for all types of contracts. This includes, but is not limited to: contracts for services, affiliation or internship agreements, grant agreements, cost reimbursement agreements, and MOUs, even if there are no funds exchanged.

When a site or department has a contract with a third party that requires a signature, the following steps should be taken:

1. The initiator will forward the contract to the Contracts Office, Jessica-sulli@scusd.edu.
2. The Contracts Office will provide assistance in filling out the Contract Approval and Routing Form (form).
3. The initiator will have the form signed by the Principal or Department Manager indicating that they have read and agree with the terms of the agreement.
4. The Contracts Office will help determine the appropriate signer for the IAS/Cabinet Level Approval depending on the subject matter of the agreement. The initiator will then have the form signed by the IAS or Chief.
5. The last four approvals will be facilitated by the Contracts Office: Purchasing/Contracts, Legal Services, Risk Management and Final Approval.
6. The contract will be signed upon final approval of the form and when applicable, approval of a requisition and/or approval by the Board.
7. The signed contract will be returned to the initiator or transmitted directly to the other party based on the instructions provided to the Contracts Office.

For further information specific to contracts for services, please refer to Bulletin BS-10, Contracting for Services at: <https://www.scusd.edu/pod/contracts-office-bulletins>.



CONTRACT APPROVAL AND ROUTING FORM

School Site/Department: _____ Agreement/Contract With: _____

Provide a brief description of the agreement: _____

This agreement consists of the following documents: _____

Period of Agreement: _____ Board Approval Date (if required): _____

Cancellation Terms: _____

Amount \$ _____ Revenue (Grant, Award, Reimbursement for Services Provided)

Expenditure Zero-Dollar/Non-Fiscal

If Applicable, Requisition #: _____

To Receive Funds, Invoicing Required: Yes No

Funding Source: _____

Contracts Use: Executed agreement provided to

Payment Terms: _____

Budget Accounting for invoicing

I have read and agree with the terms of this agreement:

By: _____ Date: _____
Dept. Manager/Principal (Print Name) Signature

IAS or Cabinet Level Approval (required)

I approve as to substance:

By: _____ Date: _____
IAS or Chief (Print Name) Signature

Purchasing/Contracts Review (required)

By: _____ Date: _____
Signature

Legal Services Review (when necessary)

Changes necessary as specified on the document or on the attached memorandum.

Approved as to form.

By: _____ Date: _____
(Print Name) Signature

Risk Management Approval (required)

N/A

By: _____ Date: _____
(Print Name) Signature

Insurance documents Received Issued Valid to: _____

Final Approval (required)

By: _____ Date: _____
CBO or Deputy Supt. (Print Name) Signature