Step 1

Site Desires Outside Services

Step 2

Site Obtains Central Office Approvals

Step 3

Site Creates a Requisition

Step 4

Reviewed and **Approved**

Step 5

Contracts Office Drafts Agreement

Step 6

Agreement is Reviewed and **Approved**

Step 7

Services Begin

Site is in contact with third party regarding contracting for services and wishes to move forward with a contract.

Site obtains a detailed quote, estimate or scope of work from the proposed contractor that includes, at a minimum, what work is to be done, period of

services and the cost.

Site also obtains from the proposed contractor their Certificate of Insurance with required coverage for scope of work. *Contact the Contracts Office for minimum requirements.

If services affect central office functions. approval is obtained. For example, if the agreement is for

academic/instructional. communications, operations/facilities, or technology related services, those departments must approve before the

contract can move forward. Contact the Contracts Office to help determine affected departments if needed

Site submits a Services Agreement (SA) requisition in ESCAPE. The detailed quote, estimate, scope of work

or unsigned written agreement is attached to the requisition with evidence of the functional departments' approval included. Attach Certificate of Insurance.

SA requisition is reviewed and approved by the Budget team and is *submitted for approval to the

Purchasing Review Committee (PRC) by the Contracts Office.

*>\$25,000 Unrestricted Resource *>\$50,000 Restricted Resource

Purchasing Manager will review procurement compliance

SA requisition has been approved both in ESCAPE and by the PRC. If there is no existing agreement, a written agreement will be drafted by the

Contracts Office. If the contract is >\$114.500*

> Board agenda. If data sharing is involved a Data Sharing Addendum will be required.

the Contracts Office will

submit for approval on

the next available

The written agreement required, either by the District or by the contractor, a Contract **Approval & Routing**

Form will be completed prior to District signing the agreement. The Contracts Office will send the routing form to all required approvers using DocuSign (web-

based eSignature service).

The contract is executed by both parties. Contracts Office prints purchase order and transmits it to

the contractor along with the executed agreement. Services begin.

Parties Involved: Site Contractor/Vendor

Parties Involved: Site As Needed: Academic Office Communications Operations/Facilities

Technology Services Other Depts as Needed Parties Involved: Site

Parties Involved: Budget **Contract Analyst** Purchasing Review Committee

Purchasing Manager

Parties Involved: Contract Analyst Contractor/Vendor As Needed: **Board of Education**

Parties Involved: **Contract Analyst** Principal/Director AS/AS/Chief Purchasing Mgr. Legal (as needed)

Risk Management CBO/Deputy Supt.

Parties Involved: Site **Contract Analyst** Contractor/Vendor District Signer (CBO, Purchasing Manager, Deputy Supt. or Superintendent)