



BULLETIN

SUBJECT: Contracting for Services FY 23-24 2023-24 NO. BS - 2
TO: All Principals and Department Managers
DATE: August 1, 2023
PREPARED BY: Tina Alvarez Bevens **DEPARTMENT:** Contracts Office
Contract Analyst
REVIEWED BY: Robert Aldama **APPROVED:** Jesse Castillo
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APPROVAL OF CONSULTANTS AND OTHER CONTRACTED SERVICES

The purpose of this bulletin is to remind Principals and Department Managers about procedures and requirements surrounding the authorization of contracts and agreements with third parties for services.

Principals and Department Managers should be aware only the Business Services department may legally endorse and approve such contracts and agreements, and that they may be subject to additional review by internal departments and the Board of Education. Prior to submitting such agreements and contracts for approval, Principals and Department Managers should always engage with internal stakeholders who maintain oversight for any organizational function(s) related to or impacted by the products, resources or services under consideration.

Approval is not guaranteed; services **may not** be rendered prior to obtaining approval and executing a contract and/or purchase order. **PRINCIPALS AND DEPARTMENT MANAGERS CAN BE HELD PERSONALLY RESPONSIBLE FOR EXPENSES RELATED TO UNAUTHORIZED SERVICES.**

All requests for consultants and other service providers, including services related to academics, technology and facilities, must be submitted on a Service Agreement (SA) requisition for approval **prior to** the service(s) being performed. The Contracts Office will process your requests and submit for signature, and Board approval, if necessary.

- Reference the attached flowchart for visual guidance of the necessary steps to entering into a contract.

Be prudent – spend wisely. Our Board of Education monitors expenditures to ensure that they align to our district goals and support positive student outcomes. Administrators are encouraged to review their requirements carefully and use due restraint before submitting a SA requisition.

If a written agreement, contract or Memorandum of Understanding (MOU) with the District is required by the party providing the services, even if there is no use of district funds, it must be signed/approved by the Superintendent and/or Chief Business Officer after completion of a Contract Approval & Routing Form. No other signature is authorized.

- A Purchasing Review Committee reviews and approves all service agreements over \$25,000 (non-restricted resource) or over \$50,000 (restricted resource), including contracts and MOUs.
- All SA requisitions are approved on-line by funding approvers. SA requisitions over \$20,000 typically require written contracts, which the Contracts Office prepares. The Superintendent or the Chief Business Officer must approve/sign these contracts before a purchase order is printed and payment is issued. No other signature is authorized.
- As of January 1, 2023, contracts that exceed \$109,300 require Board approval. The threshold for Board approval changes every January 1st.
- Any requisition that involves the use of services or products requiring access to district data must include a Data Sharing Agreement. This document serves to ensure that data security and privacy requirements will be met by outside agencies with access to district information. Please contact the Technology Services department at support@scusd.edu to request the initiation of a Data Sharing Agreement.

In addition, all purchases of technology resources will be reviewed in detail to maintain conformance to district standards and to ensure fit to purpose. Requisitions may be adjusted to maximize the value of specific items being purchased.

- If the services of an independent contractor are being considered, please reference the Independent Contractor Guidelines posted on the Contracts Office webpage at www.scusd.edu/contracts-department. This document will help you determine whether the individual providing services is truly an independent contractor or should be treated as an employee.
- Contracts over \$5,000 paid from Associated Student Body funds must also be reviewed by the Contracts Office.