



CONTRACT REVIEW WITH EXCHANGE OF MONEY

Responsible: Purchasing Department

PURPOSE

This Administrative Procedure is for the use of Washoe County School District's (District) Contract Review with Exchange of Money Form (AF 3326; copy attached used for the review and approval of contracts (e.g., agreements, leases, End User License Agreements (EULA), Privacy Policies, Terms of Service, and other legally binding documents) where money is exchanged between an entity or entities and the District. The *exchange of money* includes the District paying for service(s) and/or product(s) and/or receiving money for service(s) and/or product(s), which is considered revenue generating.

PROCEDURE

1. Step One – "THIS TOP SECTION, INCLUDING OBTAINING ALL REQUIRED APPROVALS, TO BE COMPLETED BY THE INDIVIDUAL SUBMITTING FOR REVIEW"
 - a. For contracts that will require an expenditure of District funds, which includes grant and capital funds, the individual submitting for review and approval shall complete the AF 3326 with the following information:
 - i. Date: *(date the form was initiated by the individual submitting the contract for review)*
 - ii. Requested Completion of Review Date:
 - iii. Name & Title of Individual Submitting for Review:
 - iv. School or Department Name:
 - v. Phone #:
 - vi. Contract Title:
 - vii. Description of Services (required) with the name of the Vendor/Contractor and other important relevant information:
 - viii. WCSD Requestor (Employee) Public Disclosure Form (Pages 2 and 3) required completed and signed:
 - ix. Contract Amount \$ _____
 - x. Contract Term Dates: _____ to _____
 - xi. Board of Trustees Meeting date for award (if applicable):
 - xii. Budget Account # to be charged or "SAF" for Student Activity Fund:

2. Step Two – “REQUIRED APPROVAL SIGNATURES (ONLY CERTIFIED DIGITAL SIGNATURES WILL BE ACCEPTED)”

- a. The following approvals and signatures are required prior to submitting the contract to the Purchasing Department (Purchasing) as instructed below (STEP TWO(b)).
 - i. Principal (for schools) or Department Head (for depts):
 - ii. Other Dept. (if applicable) (i.e., Curriculum, Assessment, etc.):
 - iii. Area Superintendent (required for schools):
 - iv. Chief Officer (required for departments):
 - v. Chief IT Officer (if applicable for software license agreements):
- b. Upon completion of the AF 3326’s TOP SECTION, the individual submitting for review is to email AF 3326, the contract, and the completed and signed WCSD Requestor (Employee) Public Disclosure Form (Pages 2 and 3), to Purchasing via email to:
 - purchasing@washoeschools.net
- c. Only certified digital signatures will be accepted on AF 3326. Forms signed in longhand will be returned to the individual who submitted the documents for review.

3. Step Three – “THIS BOTTOM SECTION TO BE COMPLETED BY THE PURCHASING DEPARTMENT”

- a. Upon emailed receipt of the form and contract as instructed above (STEP 2(b)), the Purchasing Department will log internally and assign the contract to the appropriate Purchasing Department staff for review.
 - i. The Purchasing staff will be responsible for:
 - Completing the Purchasing Staff Assigned for Review and Date Assigned fields.
 - Obtaining applicable funding approval.
 - For non-grant and non-capital expenditures under \$20,000, funding approval is not required. Contract expenditures at \$20,000 or more will require budget approval.
 - All grant and capital funded contracts, regardless of cost, will require budget approval.

- Determining if the contract will require insurance from the vendor/contractor and/or WCSD insurance.
 - If WCSD insurance documentation is required per the contract the Purchasing staff member will note in the Purchasing's Comments/Concerns section, the individual submitting the contract for review will be required to obtain it from the Risk Management Department.
 - If insurance documentation is required per the contract, the Purchasing staff will either send a request to the vendor/contractor to provide required insurance documentation or confirm insurance documentation is on file in the department.
- b. The Purchasing staff will review all of the contract terms and conditions, quotes/proposals included, specifications, policies, practices, including information found using any URL and/or website addresses referenced in the (i.e., *Terms and Conditions can be found at: [www.\[website identifier\].com](http://www.[website identifier].com)*).
- c. Some key factors the Purchasing staff reviews and works to negotiate revisions/changes with the vendor/contractor prior to moving the review forward through the process include, but are not limited to:
 - i. Automatic renewals;
 - ii. Termination (e.g., with or without convenience; funding out; no penalty);
 - iii. Term of contract and payment terms;
 - iv. Legal notices;
 - v. Governing law (state and venue);
 - vi. Scope of work/services and/or deliverables;
 - vii. Warranties;
 - viii. Indemnification; and
 - ix. Management and confidentiality practices of PII (personal identification information), FERPA (Family Educational Rights and Privacy Act) information, and HIPPA (Health Insurance Portability and Accountability Act) information for students and/or staff.

- d. After the Purchasing staff has completed their review and initial negotiations of any requested revisions/changes have been obtained from the vendor/contractor, they will outline their findings in the "Purchasing's Comments/Concerns" section and then forward all documentation to the Director of Procurement and Contracts for their approval or in their absence, the Assistant Director of Procurement and Contracts. If extra space is needed, the Purchasing staff can attach a document with all comments and concerns and refer to the attached document in the "Purchasing's Comments/Concerns" section.
 - i. The Director or Assistant Director of Procurement and Contracts will either approve and return the form to the Purchasing staff for further action required in the review process; **or**
 - ii. Return the form with additional revisions/changes needed to be obtained from the vendor/contractor by the Purchasing staff.
 - If the above is requested and after completed, the Purchasing staff will be required to re-submit to the Director or Assistant Director of Procurement and Contracts for review and approval.
4. Step Four – "THIS SECTION TO BE COMPLETED BY THE OFFICE OF THE GENERAL COUNSEL OR GRANTS LEGAL COUNSEL"
- a. The Purchasing staff will be responsible for emailing the AF 3326, and all submitted documentation to either the Office of the General Counsel or Grants Department Legal Counsel (Counsel) which will review and notate the following:
 - i. Whether or not a "Parent/Guardian Consent or Waiver" form is required.
 - If yes, the individual submitting the contract for review will be responsible for obtaining a copy of the District's "Parent/Guardian Consent or Waiver" form and process accordingly.
 - ii. Counsel will note their findings in the "Counsel's Comments/Concerns" section which may include acknowledgement and approval of Purchasing's Concerns/Comments or a may require the Purchasing staff to contact the vendor/contractor to re-negotiate revisions/changes.
 - iii. Counsel will approve "as to form", date, digitally sign, and return the form to the Purchasing staff for finalization; **or**
 - iv. Counsel will mark the form as "Re-Draft" and return the form to Purchasing for additional actions.

- If a "Re-Draft" is requested by Counsel, the revised contract , and any other supporting documentation (e.g., email communications) must be resubmitted by the Purchasing staff to the requesting Counsel for review and approval.
- If the "Re-Draft" is approved by Counsel, they will complete the "Date Re-Draft Approved" field, digitally sign, and return the form with all submitted documentation to the Purchasing staff for finalization.

5. Step Five – NOTICE AND EXECUTION OF SIGNATURES

- a. If several and/or significant risks/concerns exist, those risks/concerns and final factors of negotiation processed should be provided via email for acknowledgement and acceptance to the individual who submitted the contract for review. A copy of this email communication is to be kept on file in Purchasing accordingly. If some, but not several or significant, risks are present, those are notated in the comments/concerns section of the review form.
- b. The Purchasing staff will obtain all required and authorized signatures for the contract from the entity or entities and the District (as defined in Board Policy 3321 Contract Review and Approval).
 - i. The Superintendent, or their designee, has the authority to sign contracts of any value.
 - Contracts valued at \$100,000 or greater require approval from the District's Board of Trustees prior to obtaining final authorized signatures.
 - ii. The Chief Financial Officer has the authority to sign contracts with a value up to \$100,000.
 - iii. The Director of Procurement & Contracts has the authority to sign contracts with a value of up to \$50,000. In the absence of the Director of Procurement, this task may be delegated to an Assistant Director of Procurement and Contracts.
- c. Once all final authorized signatures on the contract have been obtained by the Purchasing staff, a copy of the completed AF 3326 with all review-related documentation and a copy of the fully executed contract are returned to the individual who submitted the contract for review.
- d. The review of the contract is logged as "completed" and copies of all documents are filed accordingly in Purchasing.

REQUIREMENTS AND ASSOCIATED DOCUMENTS

1. This Administrative Procedure reflects the goals of the District’s Strategic Plan and aligns/complies with the following governing Board Policies and Administrative Regulations of the District:
 - a. [Board Policy 3320 – Procurement](#)
 - b. [Board Policy 3321 – Contract Review and Approval](#)
 - c. [Administrative Regulation 3322 – Contract Review and Approval](#)
 - d. [Administrative Regulation 3323 – Professional Services](#)

REVISION HISTORY

Date	Revision	Modification
01/01/2022	1.0	Adopted (separated from Administrative Form 3326)
02/14/2024	2.0	Revised to follow instructions outlined in approved Administrative Form 3326 (v.13, dated 11/21/23); removed the word “Document” from the title and as previously referenced as “Contract/Document”; changed order of instruction to Section 5 and clarified signature authorities; misc. other revisions for overall clarity of procedure process, readability, and formatting; attached AF 3326.
11/01/2024	3.0	Corrected error in AF number noted in 5(c) (was 3327 now is 3326); reformatted the properties in a fillable “Date” field in the corresponding form (AF 3326) that was duplicating in another unrelated “Date” field within the form.
04/21/2025	4.0	Revised Step 3(a)(i) to reflect new process of acquiring budget approvals for non-grant/non-capital related expenditures at \$20,000 or more and for all grant and capital funded contracts regardless of cost; revised title of “Associate Chief” to be “Area Superintendent”; revised language in Section 3(a)(i)(*) to match new budget approval process; added Assistant Director to form approval process in Section 3(d); updated AF 3326 to reflect revised Step 3(a)(i) and attached it to this procedure.



CONTRACT REVIEW – Exchange of Money

THIS TOP SECTION INCLUDING OBTAINING ALL REQUIRED (*) APPROVAL SIGNATURES IS TO BE COMPLETED BY THE INDIVIDUAL SUBMITTING FOR REVIEW

After completion of this TOP SECTION, email this form, the contract/document, any related documentation, and the completed Public Disclosure Form to the Purchasing Department via email to: purchasing@washoeschools.net

Today's Date: _____ Requested Completion of Review Date: _____

* Name & Title of Individual Submitting for Review: _____

School or Department Name: _____ Phone #: _____

Contract/Document Title: _____

*** Description of Services (required) with name of Vendor/Contractor and other important information:**

WCSD Requestor (Employee) Public Disclosure Form (PUR-F210(A) attached) required completed and signed): _____

Contract Amount: \$ _____ Contract Term Dates: _____ to _____

Board of Trustees Meeting Date for Award (if applicable): _____

Budget Account # to be Charged or "SAF" for Student Activity Fund: _____

*** REQUIRED APPROVAL SIGNATURES (ONLY CERTIFIED DIGITAL SIGNATURES WILL BE ACCEPTED)**

Principal (for schools) or Department Head (for depts): _____

Other Dept. (if applicable) (i.e. Curriculum, Assessment, etc.): _____

Area Superintendent (required for schools): _____

Chief Officer (required for departments): _____

Chief IT Officer (if applicable for software license agreements): _____

THIS BOTTOM SECTION TO BE COMPLETED BY THE PURCHASING DEPARTMENT

Purchasing Staff Assigned for Review: _____ Date Assigned: _____

Budget Approval *(not required if non-grant/non-capital contract under \$20,000)* _____

Is Vendor/Contractor insurance required? Yes _____ No _____ Is WCSD insurance required? Yes _____ No _____

Purchasing's Comments/Concerns:

Approved: ___v___ Date: _____ Director/Assistant Procurement Director:

TO BE COMPLETED BY THE OFFICE OF THE GENERAL COUNSEL OR GRANTS LEGAL COUNSEL

Is a Parent/Guardian Consent Waiver required? Yes _____ No _____

Counsel's Comments/Concerns:

Approved as to Form: _____ Date: _____ *Re-Draft Required: _____ Date Re-Draft Approved: _____

** If a re-draft is required, a revised contract must be re-submitted for approval.*

General Counsel **or** Grants Legal Counsel:

**WASHOE COUNTY SCHOOL DISTRICT PUBLIC DISCLOSURE FORM
WCSD REQUESTOR (EMPLOYEE)**

THIS IS A REQUIRED FORM TO BE COMPLETED, SIGNED, AND SUBMITTED BY THE WCSD REQUESTOR (EMPLOYEE)

WCSD REQUESTOR (EMPLOYEE) FIRST/LAST NAME: _____

I understand that per NRS 281A.020, a public office is a public trust and shall be held for the sole benefit of the people, and a public officer or employee must commit themselves to avoid conflicts between the private interests of the public officer or employee and those of the general public whom the public officer or employee serves.

Furthermore, I understand that pursuant to Washoe County School District (WCSD) Board of Trustees Policy 4505 and per NRS 281A.400, WCSD employees (as public officers) shall not seek and/or accept any gift, work/service, favor, employment, engagement, emolument, and/or economic opportunity, including, but not limited to, unlawful compensation, salary, retainer, augmentation, expense allowance, commission, personal profit, pecuniary interest in the course of performing WCSD duties. In addition, WCSD employees (as public officers) shall not use their positions to secure and/or grant unwarranted privileges, preferences, exemptions, and/or advantages for the public officer or employee with any business entity.

By signing this form, I certify and acknowledge that I am a WCSD employee and/or a public officer of WCSD and that failure to disclose all facts relative to a conflict and/or potential conflict of interest (ethical standards) concerning the specific solicitation, project, and/or contract to which the VENDOR/CONTRACTOR named above is submitting to WCSD may result in a rejection of said solicitation, project and/or contract submission and/or termination of any resulting contract should the above-named VENDOR/CONTRACTOR be selected and/or awarded. Furthermore, I certify and acknowledge that failure to disclose the existence of a conflict and/or potential conflict of interest may result in disciplinary action, up to and including termination.

By signing this form, I also certify that I have completed the following and have provided true and accurate information to the best of my knowledge:

- A. I certify that I have **NO** private pecuniary or financial interest in either the VENDOR/CONTRACTOR or the INDEPENDENT CONTRACT AGREEMENT. **AGREE** **DISAGREE**

If you DISAGREE and cannot certify, then please explain:

- B. I certify that, to the best of my knowledge, **NO** current or former WCSD employees, officers, or trustees have a private pecuniary or financial interest in the VENDOR/CONTRACTOR or the awarding of the INDEPENDENT CONTRACT AGREEMENT.
 AGREE **DISAGREE**

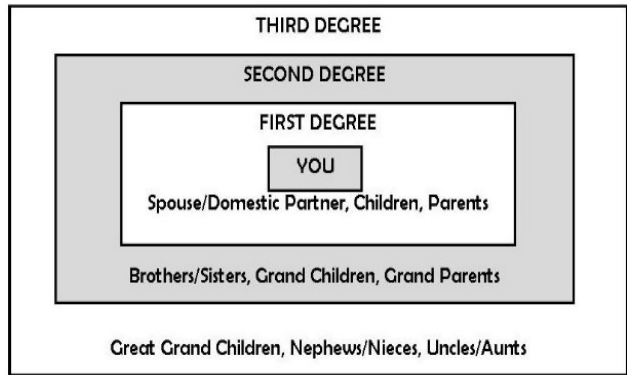
If you DISAGREE and cannot certify, then please explain:

- C. I certify that my family members, to the third degree of consanguinity (refer to the chart below), **DO NOT** have a private pecuniary or financial interest in the VENDOR/CONTRACTOR or the awarding of the INDEPENDENT CONTRACT AGREEMENT.
 AGREE **DISAGREE**

If you DISAGREE and cannot certify, then please explain:

SIGNATURE: _____

DATE: _____



SUPERVISOR OF WCSD REQUESTOR (EMPLOYEE) FIRST/LAST NAME: _____

I understand that pursuant to WCSD Board of Trustees Policy 4505 and per NRS 281A.400, WCSD employees (as public officers) shall not seek and/or accept any gift, work/service, favor, employment, engagement, emolument, and/or economic opportunity, including, but not limited to, unlawful compensation, salary, retainer, augmentation, expense allowance, commission, personal profit, pecuniary interest in the course of performing WCSD duties. In addition, WCSD employees (as public officers) shall not attempt to benefit a significant personal or pecuniary interest of the public officer or employee or any person to whom the public officer or employee has a commitment in a private capacity through the influence of a subordinate. By signing this form, I certify and acknowledge that I am the direct supervisor of the WCSD employee and/or a public officer of WCSD submitting this request and that I, and my family members to the third degree of consanguinity, have no significant personal or pecuniary interest in either the **VENDOR/CONTRACTOR** or the **INDEPENDENT CONTRACT AGREEMENT** submitted by my subordinate employee.

SIGNATURE OF SUPERVISOR: _____

DATE: _____