



Responsible: Purchasing Department

PURPOSE

This Administrative Procedure is used for the review and approval of documents such as contracts, agreements, leases, and other legally binding documents where money is exchanged between another entity or entities and the Washoe County School District (District). The *exchange of money* includes the District paying for service(s) and/or product(s) or receiving money for service(s) and/or product(s) (revenue generating).

PROCEDURE

1. Step One – “THIS SECTION TO BE COMPLETED BY THE REQUESTING SCHOOL OR DEPARTMENT”
 - a. For documents that will require an expenditure of District funds, to include grant funds, the department/school seeking review and approval shall complete the Administrative Form 3326 Document Review with Exchange of Money with the following information:
 - i. Date submitted and requested completion date;
 - ii. Name and title of individual submitting document;
 - iii. School or Department;
 - iv. Phone number;
 - v. Document/contract title;
 - vi. Vendor Name & Additional Information* – include a complete description of the document/contract and services/products to be provided and/or any specific questions;
 - vii. Contract amount;
 - viii. Term dates (beginning and ending);
 - ix. Budget Account Code to be charged; and
 - x. Completed and fully executed copies of both Public Disclosure Forms are to be completed and submitted with review documentation.
 - WCSD Staff Requesting Contract (AF 3326; Page 2 of 3)
 - Vendor/Contractor (AF 3326; Page 3 of 3)
2. Step Two – “REQUIRED APPROVALS / SIGNATURES”
 - a. The following approvals and signatures are required prior to submitting the document, contract, or agreement to the Purchasing Department.

- i. Principal/Department Head. For schools, all documents subject to an expenditure of District funds must be approved by the principal or site administrator. For Departments, all documents subject to an expenditure of District funds must be approved by the Department Head.
 - ii. Area Superintendent. Documents/contracts for schools, once approved by the principal, shall be reviewed and approved by the Area Superintendent of the Office of School Leadership.
 - iii. Chief Officer. For departments/non-schools, all documents subject to an expenditure of District funds shall be submitted by the department head. Documents/expenditures approved by the department head shall be reviewed and approved by the Chief Officer.
 - iv. Chief IT Officer. If the contract/agreement relates to software or license agreements, the contract/agreement must be reviewed and approved by the Chief Information Officer from the office of Information Technology.
 - b. Upon completion of the above, send the review form, any related documentation, both completed and fully executed Public Disclosure Forms, and the document/contract to the Purchasing Department via email to: purchasing@washoeschools.net. Original signatures are not required. The document may be copied and scanned for the purpose of emailing to Purchasing. The contract review form has been created to accept electronic signatures. It is preferred to use electronic signatures for each approval rather than printing, signing, and scanning wherever possible.
3. Step Three – “THIS SECTION TO BE COMPLETED BY THE PURCHASING DEPARTMENT”
 - a. Upon receipt of the document review form, contract/agreement, and any other applicable documentation, the documents are logged on the Contract Review Log and assigned to the appropriate Purchasing Department staff member (Reviewer), who will be responsible for processing the first of two Purchasing review phases (refer to Section 3d). The assigned person will notate the following:
 - i. Approval of any other applicable departments such as the Department of Curriculum and Instruction, the Office of Human Resources, the Department of Assessment, and/or any other department deemed necessary by the Purchasing Department;
 - ii. Approval that funds exist for the execution of the contract through the Office of Business and Financial Services or the Grants Department;
 - iii. Ensure that his/her name is listed as the Purchasing Staff Assigned; and
 - iv. Whether or not the contract will require insurance.

- b. The Reviewer reviews any/all terms and conditions, quotes/proposals included, specifications, policies, practices, including any URL and/or website addresses referenced in the document (s) (i.e., *Terms and Conditions can be found at: [www.\[website identifier\].com](http://www.[website identifier].com)*) and any other documents that have been provided.
 - c. Some key factors the Reviewer looks for in the documentation and works to negotiate revisions/changes with the vendor/firm prior to moving the review forward include, but are not limited to:
 - i. Automatic renewals;
 - ii. Termination (e.g., 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 (if applicable);
 - 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 Reviewer has completed his/her review and negotiations (phase 1 of 2), the document packet is provided to the Director of Procurement and Contracts for his/her approval of the Reviewer's action(s) and/or to add any concerns or additional edits needed to be revisited by the Reviewer (phase 2 of 2).
 - e. After the Director of Procurement and Contracts approves the review form, he/she will either:
 - i. Approve the document and move it forward to the Office of the General Counsel or Grants Department Legal Counsel (dependent on type of funding); or
 - ii. Return the document to the Reviewer to address noted concerns and additional edits that need to be completed prior to his/her final approval. This may require the Reviewer to contact the vendor/firm again.
4. Step Four – "THIS SECTION TO BE COMPLETED BY THE OFFICE OF THE GENERAL COUNSEL (non-grant funded) or GRANTS LEGAL COUNSEL (grant funded)"

- a. The Office of the General Counsel or Grants Department Legal Counsel shall review and notate the following:
 - i. Need for a parent/guardian consent or waiver to accompany execution of the contract or agreement. If so, the school/department must contact the Office of the General Counsel to obtain a copy of the District's waiver form. Staff are not to create their own release/waiver.
- b. Legal counsel will either:
 - i. Approve the document as to form and return it to the Purchasing Department for execution; or
 - ii. Return the document for redraft. As stated above, this may include the Purchasing Department contacting the vendor directly to negotiate terms; and
 - iii. If a redraft is required, the revised contract must be resubmitted for Legal review and approval.

5. Step Five – "NOTICE AND EXECUTION"

- a. Any contract valued at \$100,000 or greater requires approval from the District's Board of Trustees prior to final execution of the contract.
- b. The Purchasing Department will notify the requestor when the review has been completed and will obtain final authorized signatures to the contract (if applicable).
- c. Once final authorized signatures have been obtained, all final documents are returned to the requestor and copies are filed and logged accordingly in the Purchasing Department.

REQUIREMENTS AND ASSOCIATED DOCUMENTS

- 1. This Administrative Procedure reflects the goals of the District's Strategic Plan and aligns/complies with the governing documents of the District, to include:
 - a. Board Policy 3321, Contract Review and Approval
 - b. Administrative Regulation 3322, Bids/Quotations and Contracts

REVISION HISTORY

Date	Revision	Modification
01/01/2022	1.0	Adopted (separated from Administrative Form 3326)