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**THIS SECTION TO BE COMPLETED BY THE REQUESTING SCHOOL OR DEPARTMENT**

Date Submitted: \_\_\_\_\_ Requested Completion Date: \_\_\_\_\_

Name/Title of Individual Submitting for Review: \_\_\_\_\_

School/Department: \_\_\_\_\_ Phone #: \_\_\_\_\_

Document/Contract Title: \_\_\_\_\_

Additional Information: \_\_\_\_\_

Contract Amount: \_\_\_\_\_ Term Dates: \_\_\_\_\_ to \_\_\_\_\_

Budget # to be charged: \_\_\_\_\_

**REQUIRED APPROVALS/SIGNATURES**

Principal/Administrator (for schools only): \_\_\_\_\_

Area Superintendent (required for schools): \_\_\_\_\_

Chief Officer (for Departments): \_\_\_\_\_

Chief IT Officer (if applicable for Software/License Agreements): \_\_\_\_\_

**Upon completion of the above**, send this form, any related documentation, and the contract/document to the Purchasing Department via email (purchasing@washoeschools.net). Original signatures are not required.

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**THIS SECTION TO BE COMPLETED BY THE PURCHASING DEPARTMENT**

Other Approval (if applicable) (i.e. Curriculum, Assessment, etc.): \_\_\_\_\_

Business Office **or** Grants Dept. (fund confirmation): \_\_\_\_\_

Purchasing Staff Assigned: \_\_\_\_\_

Insurance Required? Yes \_\_\_\_\_ No \_\_\_\_\_

Approved \_\_\_\_\_ Dated: \_\_\_\_\_

Director of Procurement and Contracts Approval: \_\_\_\_\_

Comments: \_\_\_\_\_

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**TO BE COMPLETED BY THE OFFICE OF THE GENERAL COUNSEL or GRANTS LEGAL COUNSEL**

Is a Parent/Guardian Consent/Waiver Required? Yes \_\_\_\_\_ No \_\_\_\_\_

Approved as to Form: \_\_\_\_\_ Dated: \_\_\_\_\_ Re-Draft \_\_\_\_\_ Dated: \_\_\_\_\_

(If redraft is required, revised contract must be re-submitted for approval)

General Counsel or Grants Legal Counsel Approval: \_\_\_\_\_

Comments: \_\_\_\_\_

**Responsible:** Purchasing Department

1. Step One

a. "THIS SECTION TO BE COMPLETED BY THE REQUESTING SCHOOL OR DEPARTMENT"

i. For documents that will require an expenditure of District funds, to include grant funds, the department/school seeking review and approval shall complete the necessary information, to include:

1. Date submitted and requested completion date
2. Name and Title of individual submitting contract
3. School or Department
4. Phone number
5. Title of Document or Contract
6. Additional Information. Include a description of the document/contract and/or any specific questions
7. Contract Amount and term dates
8. Budget # to be charged

b. "REQUIRED APPROVALS / SIGNATURES"

i. The following approvals and signatures are required prior to submitting the document, contract, or agreement to the Purchasing Department.

1. Principal/Administrator. For schools, all documents subject to an expenditure of District funds must be approved by the principal or site administrator.
2. 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; or executive director of the Office of Student Services, as applicable.
3. 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.

4. 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.
- c. Upon completion of the above, send the contract review form, any related documentation, and the contract/document to the Purchasing Department via email (purchasing@washoeschools.net). Original signatures are not required. The document may be copied and scanned for the purpose of emailing to Purchasing.

## 2. Step Two

### a. "THIS SECTION TO BE COMPLETED BY THE PURCHASING DEPARTMENT"

- i. Upon receipt of the contract review form, contract / agreement / document, and any applicable documentation, the Purchasing Department shall notate the following:
  1. Approval of any other applicable departments such as the Department of Curriculum and Instruction and/or the Department of Assessment;
  2. That funds exist through the Office of Business and Financial Services or the Grants Department;
  3. The Purchasing Department staff member responsible;
  4. Whether or not the contract will require insurance.
- ii. The Purchasing Department will either:
  1. Approve the document and refer it to the Office of the General Counsel or Grants Department Legal Counsel (dependent on type of funding); or
  2. Return the document for redraft. This may include the Purchasing Department contacting the vendor directly to negotiate terms.

## 3. Step Three

### a. "THIS SECTION TO BE COMPLETED BY THE OFFICE OF THE GENERAL COUNSEL (non-grant funded) or GRANTS LEGAL COUNSEL (grant funded)"

- i. The Office of the General Counsel or Grants Department Legal Counsel shall review as to form and notate the following:

1. Need for a parent/guardian consent or waiver to accompany implementation of the contract or agreement. If so, the Office of the General Counsel must be contacted by the school/department for the District's Release/Waiver. Staff are not to create their own release/waiver.
  - ii. Legal Counsel will either:
    1. Approve the document as to form and return it to the Purchasing Department for execution; or
    2. Return the document for redraft. As stated above, this may include the Purchasing Department contacting the vendor directly to negotiate terms.
  - iii. If a redraft is required, the revised contract must be resubmitted for Legal review and approval.
4. Step Four, Notice and Execution
- a. The Purchasing Department shall initiate execution of the document and notify the originating school or department.
  - b. Only authorized representatives of the District may execute a contract or other agreement. See Board Policy 3321 and its associated Administrative Regulation 3322, Bids/Quotations and Contracts, for additional information.

#### **IMPLEMENTATION GUIDELINES & ASSOCIATED DOCUMENTS**

1. This Administrative Procedure reflects the goals of the District's Strategic Plan and aligns with the governing documents of the District, to include:
  - a. Board Policy 3321, Bids/Quotations and Contracts
  - b. Administrative Regulation 3322, Bids/Quotations and Contracts
  - c. Administrative Form 3327, Contract Review – No Exchange of Money

#### **REVISION HISTORY**

Date	Revision	Modification
2/7/2018	v8.0	Revised: updated form; included "approved as to form" related to legal review