

SANTA ANA COLLEGE
Checklist for Contracts under \$15,000

Agreement Name: _____

Department/Program Contact: _____

Ext. _____

**PHASE ONE: Preliminary Work & Development of Agreement
(4-6 months before desired start date)**

****NOTE: To ensure a timely process, agreements should be submitted to the Vice President of Administrative services for approval, three to four weeks prior to the start of the agreement.**

Agreements will not be signed if work has already started or has been completed.

1. Are you using a district template? If so, please be sure you are using the most current version found on the District Intranet ([link here](#)). Please also leave the template name/version in the agreement footer.

Yes No Name of Template _____ (*)

(*) Please be sure to check with Purchasing on W-9 & Certificate of Insurance requirements for this company/agency.

2. What type of agreement is this?

New (with existing partnership)

New (no previous relationship)

Renewal (*)

Amendment (*)

(*) If Renewal or Amendment, please provide original contract file name: _____

NOTE: If Purchase Agreement, please ensure that you have completed the required steps in Purchasing Agreement Quick Guide ([link here](#)). Purchase Agreement's require board approval if they individually total \$15,000 or more AND if the vendor has a cumulative District relationship that exceeds \$15,000.

Divisions/areas should check in with Administrative Services for guidance in assessing this threshold. Inquiry

Date: _____

REMINDER: Attach copy of original agreement and/or subsequent amendment(s), if applicable.

3. Term of Agreement Specified.

(Must not exceed a total of 5 years, including the renewal options)

Yes

Initial Term: _____ Renewal Options: _____ (i.e. 2, 1 yr. terms)

Automatic Renewals are not permitted.

4. Agreement reviewed by:

Andrew Lim – Director, Contracts Management Services

Date: _____

5. Review by Director/Dean before submitting to the Vendor.

Date: _____

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6. Draft agreement and terms reviewed by vendor/company. (No Signature at this Stage)

Date: _____ Name of vendor contact: _____

PHASE TWO: Submission to Area Vice President

1. If revisions are needed, they will be communicated back to the submitting area.
2. If approved as final, the area VP Executive Secretary will notify submitting area.
3. **Agreement/Contract submitted to Area Vice President's Office for their review and initials. *With your submission, also include this checklist.*** Date: _____
 - Files submitted via email to area VP Executive Secretary (Word versions preferred).

PHASE THREE: Signature Execution

****NOTE:** Before submitting to the Vice President of Administrative Services, please ensure the start date of the agreement is at least three to four weeks from the date of execution (Phase Three). This will allow ample time for review, approval, and to process a purchase order.

- Submitting area has notified the agency of RSCCD preferred signing preference, which is via adobe-sign. If the vendor's signing preference differs, please contact the Administrative Services office for guidance at x46128. Submitting area has also obtained the authorized signer's name, title and direct email address.

1. Final agreement and terms approved and signed by Vendor/company.

Date: _____ Name of vendor contact: _____

Electronic Execution (*)

The submitting area/department will prepare and email the approved electronic version of the agreement via adobe sign to the Vice President of Administrative Services for final signature/execution. Please make sure to include all the supporting documents and this checklist with your adobe-sign packet and send a carbon copy to saccontractsandagreements@sac.edu.

Please note agreements will not be signed by the Vice President of Administrative Services, if work has started or has been completed.

- As noted in the [Contracts SOP](#), the submitting Dean is responsible for logging the agreement terms in the Workbook and uploading a fully executed copy of the agreement in the Contracts Repository. The Contracts Workbook and Contracts Repository can be found in: **H:\Public\SAC Contracts Workbook and Repository**
- Please visit our District's Purchasing Services intranet page at [Purchasing Services -Forms and Resources](#) for information on completing a requisition.

(*) If an original wet signature document is needed for execution, the submitting area will coordinate directly with the outside vendor/company and the office of the Vice President of Administrative Services.