

**SANTA ANA COLLEGE**  
**Contract Checklist for Board Docket Items**

Agreement Name: \_\_\_\_\_

Department/Program Contact: \_\_\_\_\_

Ext. \_\_\_\_\_

**PHASE ONE: Preliminary Work & Development of Agreement  
(4-6 months before Board submission)**

**\*\*NOTE:** To ensure a timely process, please allow extra time to meet the deadlines for BOT docket submissions provided by the SAC President's Office. Please note work can not start until contract is fully executed (signed by Vice Chancellor of Business Services), and a PO has been generated.

1. Submitting division must request a SAC Contract Number from President's Office. Contract # \_\_\_\_\_  
(\*Must be added to the footer on each page of the contract, bottom left corner preferred)  
Date: \_\_\_\_\_

2. 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.

3. Agreement reviewed and approved by Director/Dean.  
Date: \_\_\_\_\_

4. What type of agreement is this?  
New (with existing partnership)  
New (no previous relationship)  
Renewal (\*)  
Amendment (\*)

(\* If Renewal or Amendment, please provide original contract #: \_\_\_\_\_.

**NOTE:** If the services you are purchasing are "Professional" in nature, please ensure you have completed the required steps as per the training PowerPoint listed [here](#). The checklist provided by Contracts Management Services can assist with the information required to complete the Purchase Agreement. Contracts 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 Purchasing for guidance in assessing this threshold. Inquiry Date: \_\_\_\_\_

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

5. Term of Agreement Specified (stated in docket coversheet, agreement and talking point summary)  
(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.** Please confirm your agreement does not include automatic renewal language, by checking the following box:

\*Please note the start of service should be about two weeks **after** the Board approval date. This will allow ample time to obtain necessary signatures, input a requisition and to generate a purchasing order number. As noted under AR 6330, issuance of a purchase order and a fully executed contract is required prior to the start of service.

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**6. Agreement reviewed by:**

**Andrew Lim – Director, Contracts Management Services**

Date: \_\_\_\_\_

\*Director, Contracts Management Services will manage the necessary approvals from District ITS and Risk Management as outlined in the PowerPoint.

**7. Does entity name and type of agreement match Docket Coversheet?**

(Reference line, recommendation, within body text)

Yes

**8. Has the agency/company reviewed and approved the Final document version and terms to be submitted to the Director/Dean?**

Date: \_\_\_\_\_ Name of agency person: \_\_\_\_\_

**9. Final review of docket item by Director/Dean before submitting to Vice President’s Office**

Docket Cover Sheet (\*)      Agreement      Talking Points      Date: \_\_\_\_\_

(\*) If you’re submitting a renewal or amendment to an existing agreement, you will need to embed a hyperlink to the original agreement in your docket cover sheet. ([SharePoint Web Publishing Manual](#))

**PHASE TWO: Submission**

**1. Originals (Agreement/Contract, Docket Coversheet and Talking Points) submitted to Area VP by due date in Board Docket Schedule from President’s Office. *With your submission, also include this checklist.***      Date: \_\_\_\_\_

- Files submitted via email to VP Assistant (Word versions preferred). File names should be as follows:
  - SAC Contract #\_Docket Cover\_Program Name\_Outside Agency/Vendor Name
  - SAC Contract #\_Agreement\_Program Name\_Outside Agency/Vendor Name (\*BoardDocs does not permit the upload of a signed agreement. If your agreement is already signed by the outside agency, please submit both the signed and unsigned versions.)
  - SAC Contract #\_Talking Points\_Program Name\_Outside Agency/Vendor Name (unless submitting multiple contracts within one talking point file)
- Submitting area has identified the agency's signing preference and if executing electronically, has obtained the authorized signer's name, title and direct email address.

2. If revisions are needed, they will be communicated back to the submitting area.
3. If approved as final, the VP Assistant uploads approved final docket to Assistant to President via BoardDocs by due date.
4. Assistant to President prepares final complete docket for President’s Cabinet approval, followed by submission to the District office via BoardDocs approval tree.

**PHASE THREE: Execution (post board approval)**

**Electronic Execution (\*)**

The submitting Vice President’s Office will forward the final Board approved version of the docket cover sheet and agreement back to the submitting division following each board meeting. Within 7 business days, the division will prepare the electronic version for execution (per the examples in the [Contracts Repository Example Items folder](#)).

The division creates the Adobe-Sign document to forward to the Vice Chancellor of Business Services and the authorized signer for the outside agency/company.

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- The division will copy the VP Office Executive Secretary and Assistant to the President on the Adobe-Sign document when initiated to expedite the return of the fully signed document for their files.
- As noted in the [Contracts SOP](#), the submitting Dean is responsible for logging the agreement terms and uploading a fully executed copy of the Board approved document in the Contracts Repository.

Both the workbook and repository can be found in:

- H:\Public\SAC Contracts Workbook and Repository

**(\*) If an original wet signature document is needed for execution, the submitting area will coordinate directly with the office of the Vice Chancellor, Business Operations/Fiscal Services and outside agency/company.**