



Purchase Agreement Training

Andrew Lim
Director, Contracts Management Services



Agenda

- Objective and Purpose
- Current State of District Purchasing Contracts
- What is being updated and why
- Updated Documents
- Resources
- Final Thoughts
- Questions

Objective and Purpose

Objective of the Training:

Learning to use the updated documents for purchasing goods and services.

Purpose of the Purchase Agreement:

Minimizing legal risk to the District while decreasing end user burden.

Current State

Professional Services Agreement with burden on end user to determine its application.

No agreement for the purchase of goods/services or IT goods and services

Supplier agreements often utilized

Case by case review for purchase of IT goods/services/software

Current State

Rancho Santiago Community College District routed more than \$78M 2022-2023. Without appropriate terms and conditions, there is potential for significant liability and risk.

The PSA was supposed to only be for professional services due to IRS regulations, California Public Code, etc. Using PSAs for nonprofessional services puts undue burden on Suppliers, aka “Why do I (the Supplier) have to sign this?”

Supplier agreements often utilized, which means the District starts off the back foot for any contract negotiations and potential missing clauses to minimize our liability.

Case by case review for purchase of IT goods/services/software is a manual process which delays contracts by weeks if not months.

What is
being
updated?

NEW: Purchase Agreement and Statement of Work (SOW)

REPLACES THE PROFESSIONAL SERVICES AGREEMENT

NEW: General Purchase Terms and Conditions

NEW: Data Protection Exhibit

NEW: Service Level Exhibit

Why the change?



Consistency and
efficiency



Minimize risk to the
District and Colleges



Eases burden on end
user

What is **NOT** being updated?

- Purchase Requisition Process is unchanged
- Signature process is unchanged
- Contracts Review Process is unchanged
- Public work contracts are unchanged (including Field Service Agreements)
- Speaker/Performer agreements are unchanged
- **Educational Affiliation Agreements and Instructional Service Agreements templates are unchanged**
- Independent contractor verification is unchanged

The **TOOL** is being updated, but the **PROCESS** remains the same

Contracts Management Services Intranet

**CONTRACT
GUIDE**

RESOURCES

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SERVICES**

- Contract Guide
- Resources

Continuing Education (COVID-19)

**Moved from
Risk
Management
intranet**



Purchase Agreement and SOW

Purchase Agreement and SOW

Used for purchases requiring a contract

Pre-drafted Statement of Work with fillable fields

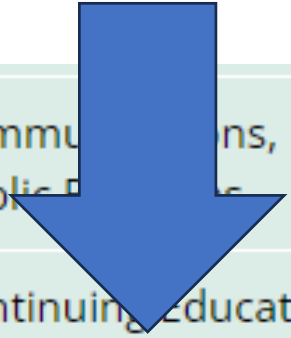
Use checklist as needed to assist with information gathering. Download on Intranet

Replaces the Professional Services Agreement but flexible to be used for non-professional services

Term: **Supplier** to be used vs. Contractor

Not to be used for public works, field service agreements, or performer agreements.

Location



Communications, Marketing &
Public Relations

Continuing Education




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SERVICES**

Coronavirus (COVID-19)

Economic Services

-  [1. Contracts Home - Contracts Guide V1 11092024.docx](#)

Templates and Downloadable Files

-  [2.1 Purchase Agreement v1 11092024.docx](#)
-  [2.2 Amendment V1 11092024.docx](#)
-  [2.3 Purchase Agreement Checklist V1 11092024.docx](#)

Example Files

Location

Communications, Marketing &
Public Relations

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Coronavirus (COVID-19)

Economic Services

-  [1. Contract Template - Contracts Guide V1 11092024.docx](#)

Templates and Downloadable Files

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Example Files

General Purchase Terms and Conditions

Incorporated by
reference

Does not need
to be added to
purchase order
in its entirety

Viewable online
by Supplier

Will be used for
bids, referenced
in purchase
orders, etc.

Location

Contract Management Services

Department Mission Statement

The mission of the Contract Management Services department is to efficiently manage contract o analysis in support of the District's mission. To that end, the Contract Management Services depa contracts within its purview in a professional and timely manner, in full accordance with Californi so that the District can meet its goals and objectives with maximum financial and operational per

Functions and Services

The CMS department creates, reviews, negotiates, and finalizes contracts and contract policies an District. We draft the standard contract templates for use by the District and Colleges and maint current law, regulations, and district policies. We draft new contracts on an as needed basis in ac regulations and district policies as the need arises. We maintain a contract repository to ensure t contracts amongst the colleges. We create, maintain, and evaluate the contracting process by the are efficiently and effectively shepherding contracts from the moment a buyer/department mem something via contract to moment the contract is signed. We maintain relationships with the can the trends that each colleges are facing in an ever-changing legal environment and provide supp

Accounts Payable

Budget Updates

Budget Summary

Business Services Committee

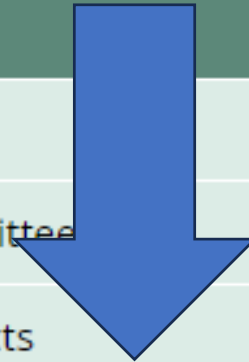
Business Services Contacts

Contract Management Services

District Safety & Security

Facility Planning, Construction and District Support Services

Fiscal Services



District Safety & Security

Facility Planning, Construction and
District Support Services

Fiscal Services

Payroll

Purchasing Services

Archived Committee Records

District. We draft the standard contract templates for use by the District and colleges and maintain current law, regulations, and district policies. We draft new contracts on an as needed basis in accordance with current law, regulations and district policies as the need arises. We maintain a contract repository to ensure that all contracts amongst the colleges. We create, maintain, and evaluate the contracting process by the colleges to ensure that we are efficiently and effectively shepherding contracts from the moment a buyer/department member identifies something via contract to moment the contract is signed. We maintain relationships with the colleges to monitor the trends that each colleges are facing in an ever-changing legal environment and provide support.

This website is intended to provide general information and guidelines and as such, may not answer all questions. Any questions not answered here may be answered by reaching out to Contract Management Services.

General Inquiries: 714-480-7586 or via email (contracts@RSccd.edu).


Office Hours: Monday – Friday 7:30 am – 4:30 pm

Employee Guides, resources and forms are located on the Employee intranet: [Contract Management Services](#)

Key Contacts

Andrew L. ... Director, Contracts Management Services – 714-480-7586

RSCCD ... contracts@RSccd.edu

 [General Purchase Terms and Conditions V1 11092024.pdf](#)

Data Protection Appendix

Used when purchasing goods and/or services that touch or affect District Restricted Data

Does not require departments to fill out form

Usage is determined by Contracts & ITS.

Service Level Agreement Exhibit

Used for IT goods and services that have service level components

Does not require Departments to fill out the form

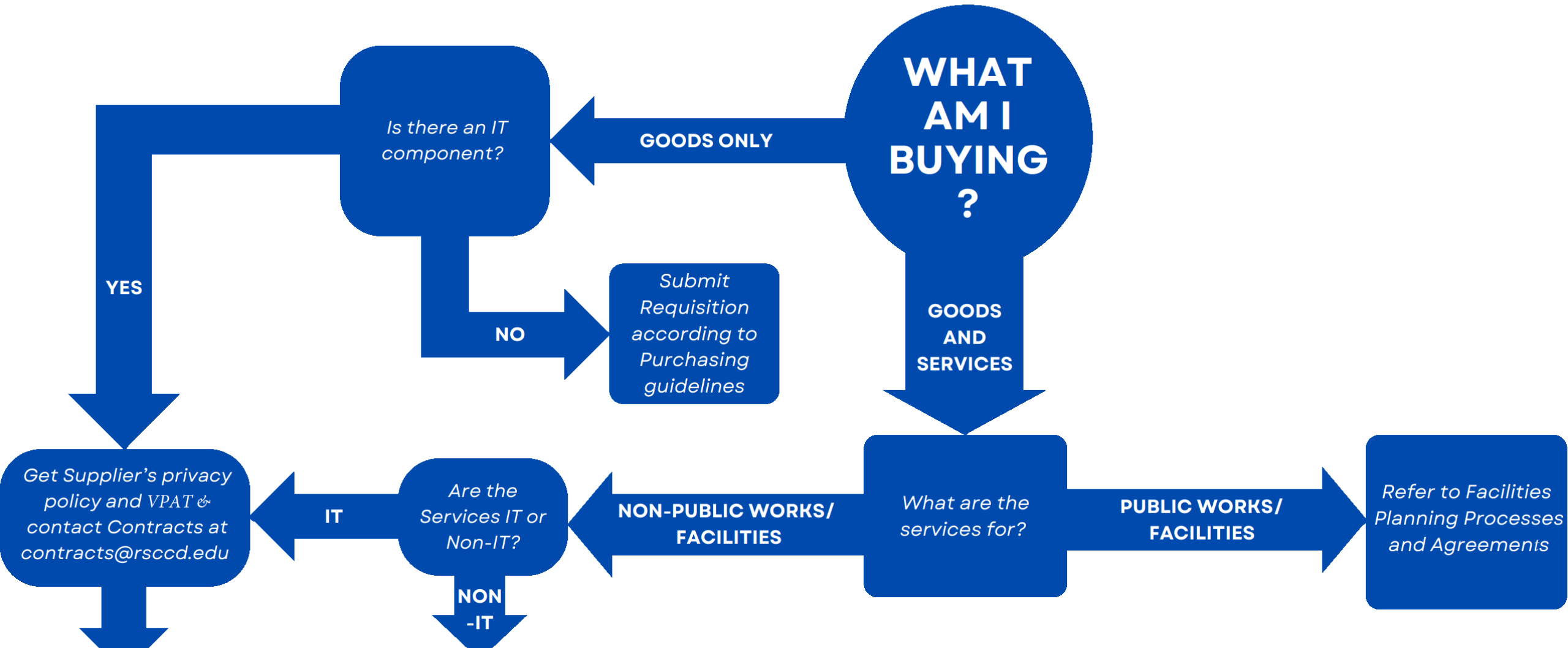
Usage to be determined by Contracts & ITS

Amendment

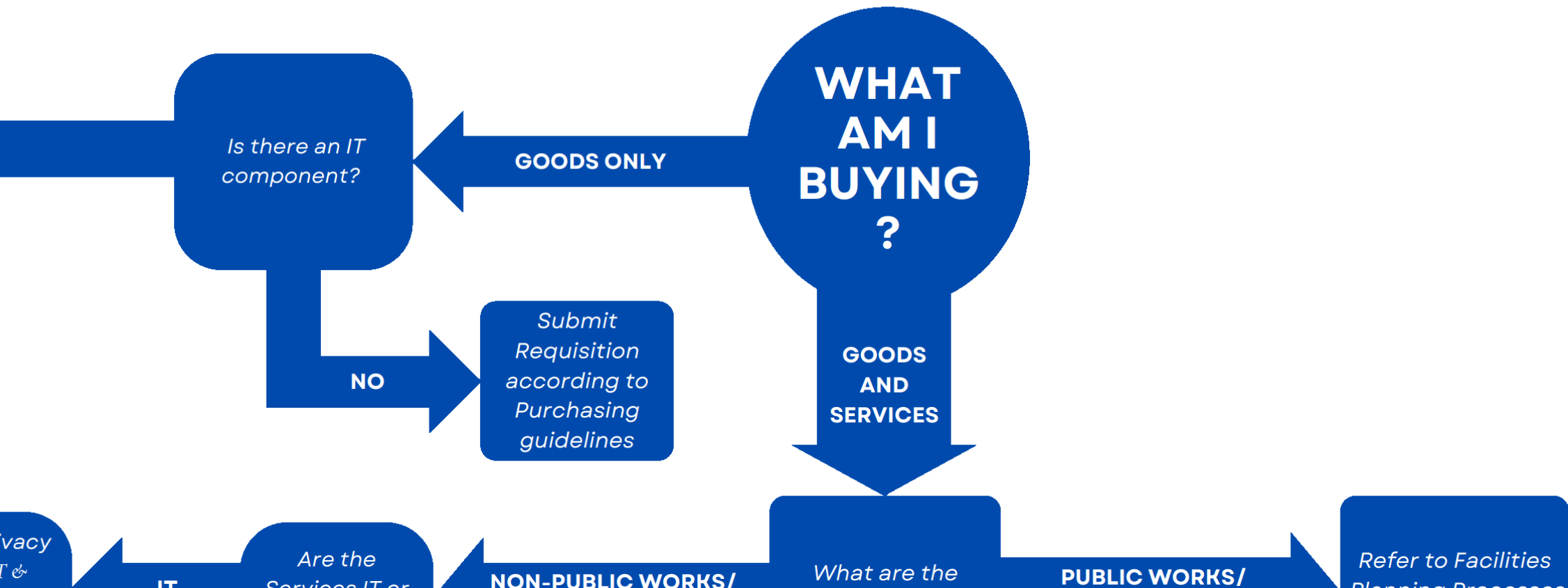
**Updated to match the
Purchase Agreement**

**Utilized to update
changes to Purchase
Agreements**

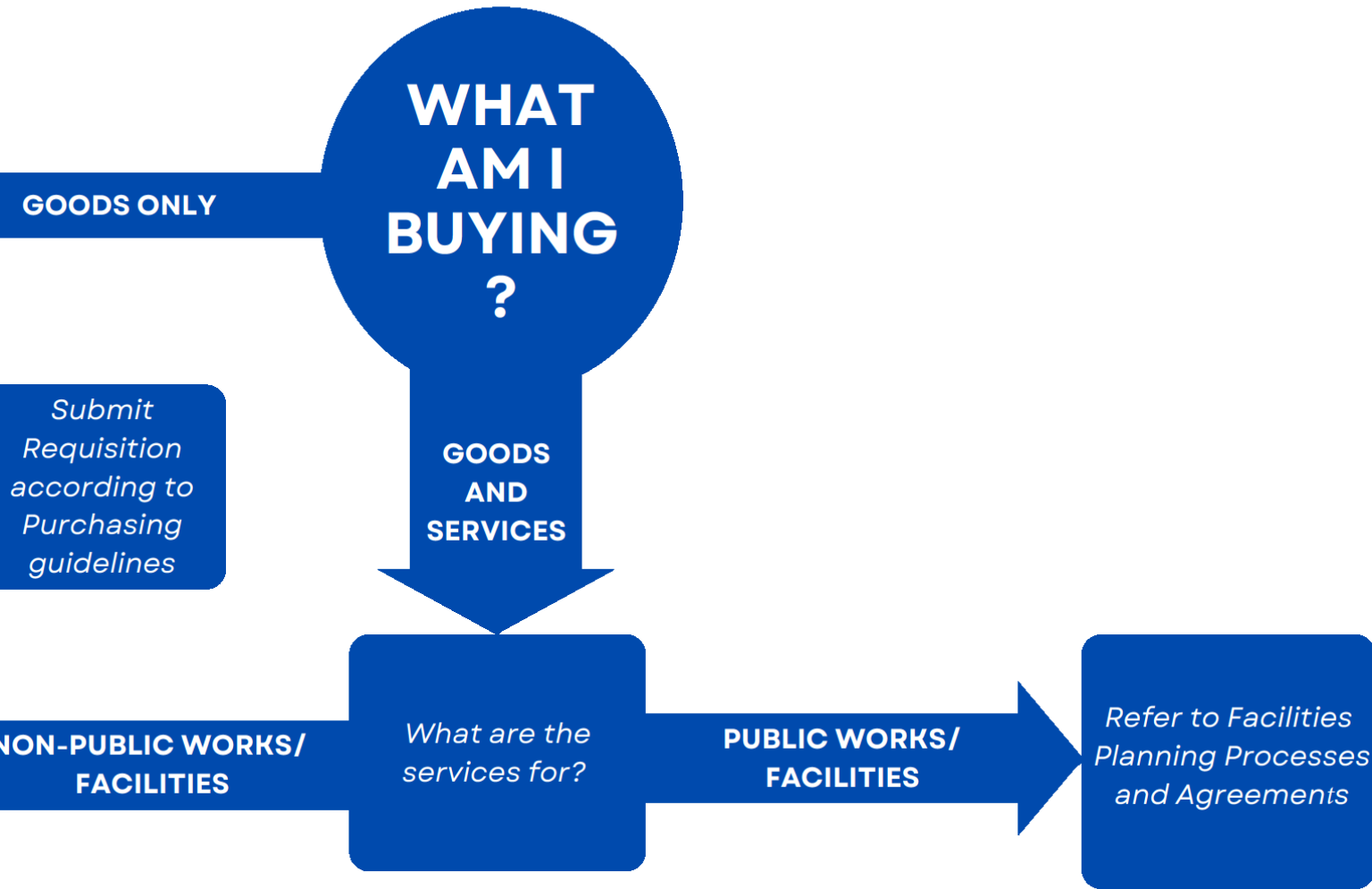
PURCHASE AGREEMENT DECISION TREE



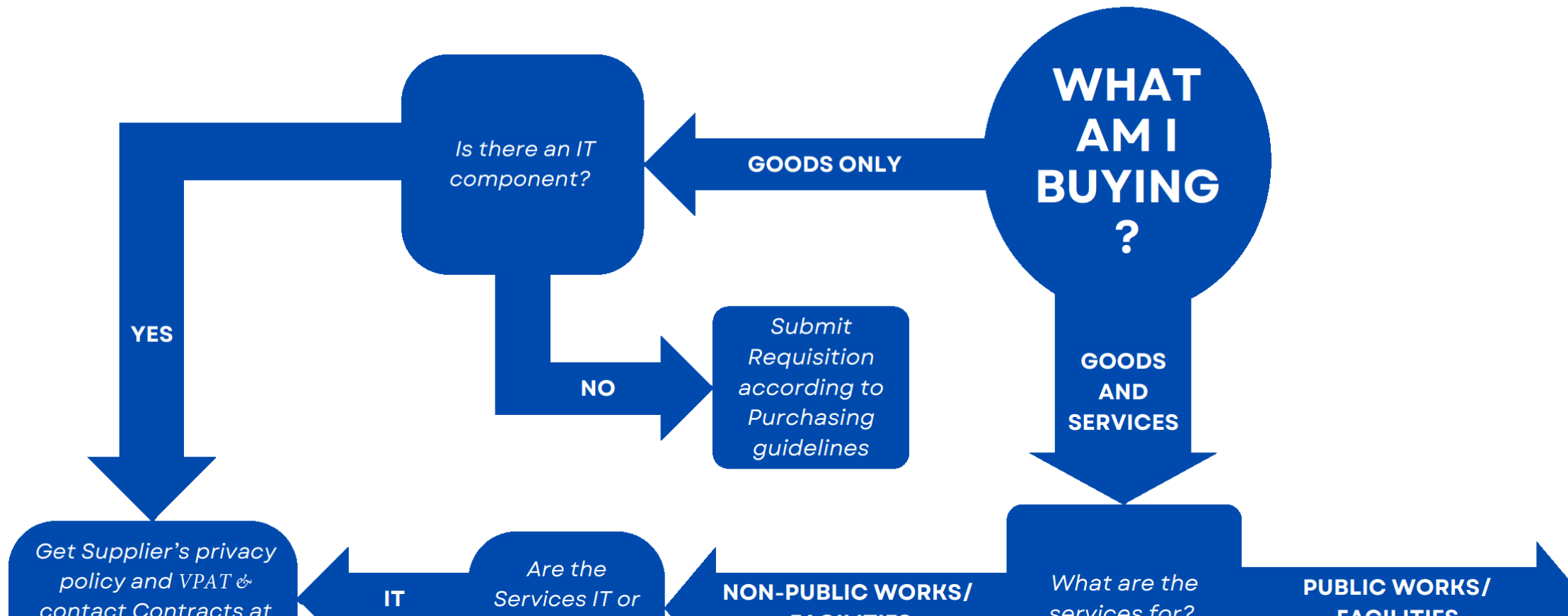
PURCHASE AGREEMENT DECISION TREE

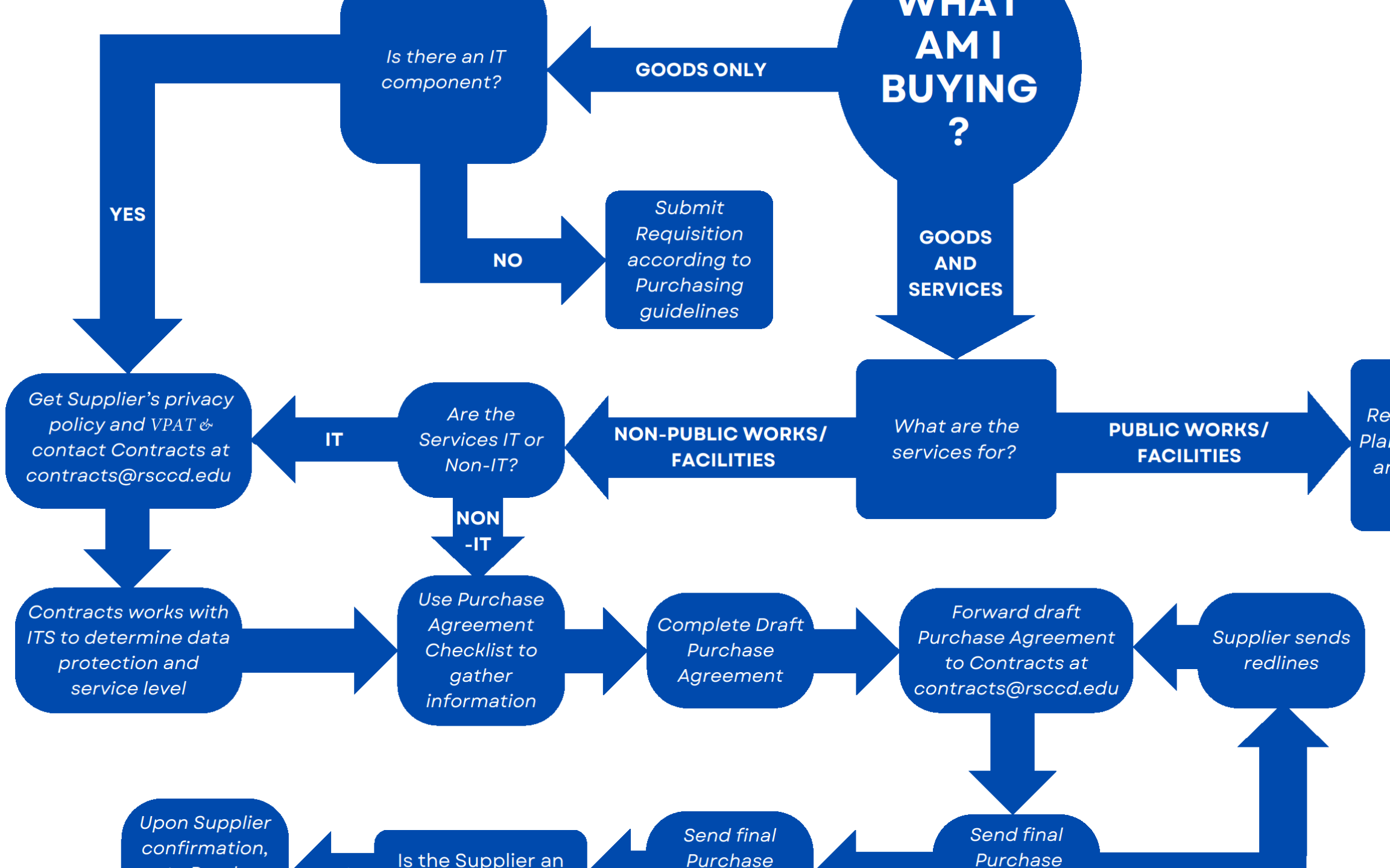






PURCHASE AGREEMENT DECISION TREE





WHAT AM I BUYING ?

GOODS ONLY

GOODS AND SERVICES

Is there an IT component?

YES

NO

Submit Requisition according to Purchasing guidelines

Get Supplier's privacy policy and VPAT & contact Contracts at contracts@rsccd.edu

IT

Are the Services IT or Non-IT?

NON-PUBLIC WORKS/FACILITIES

PUBLIC WORKS/FACILITIES

What are the services for?

Re-Plan and...

NON-IT

Contracts works with ITS to determine data protection and service level

Use Purchase Agreement Checklist to gather information

Complete Draft Purchase Agreement

Forward draft Purchase Agreement to Contracts at contracts@rsccd.edu

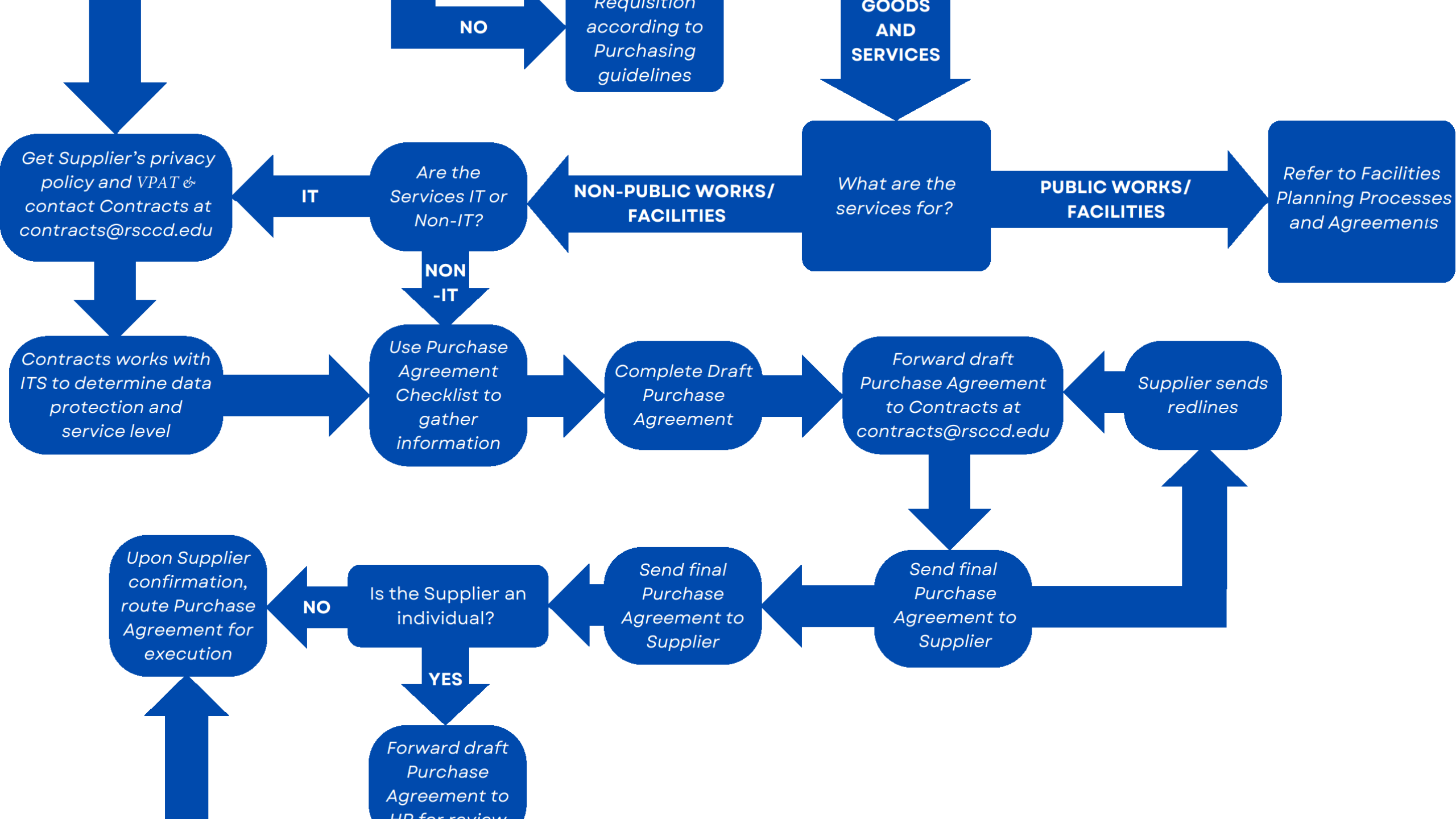
Supplier sends redlines

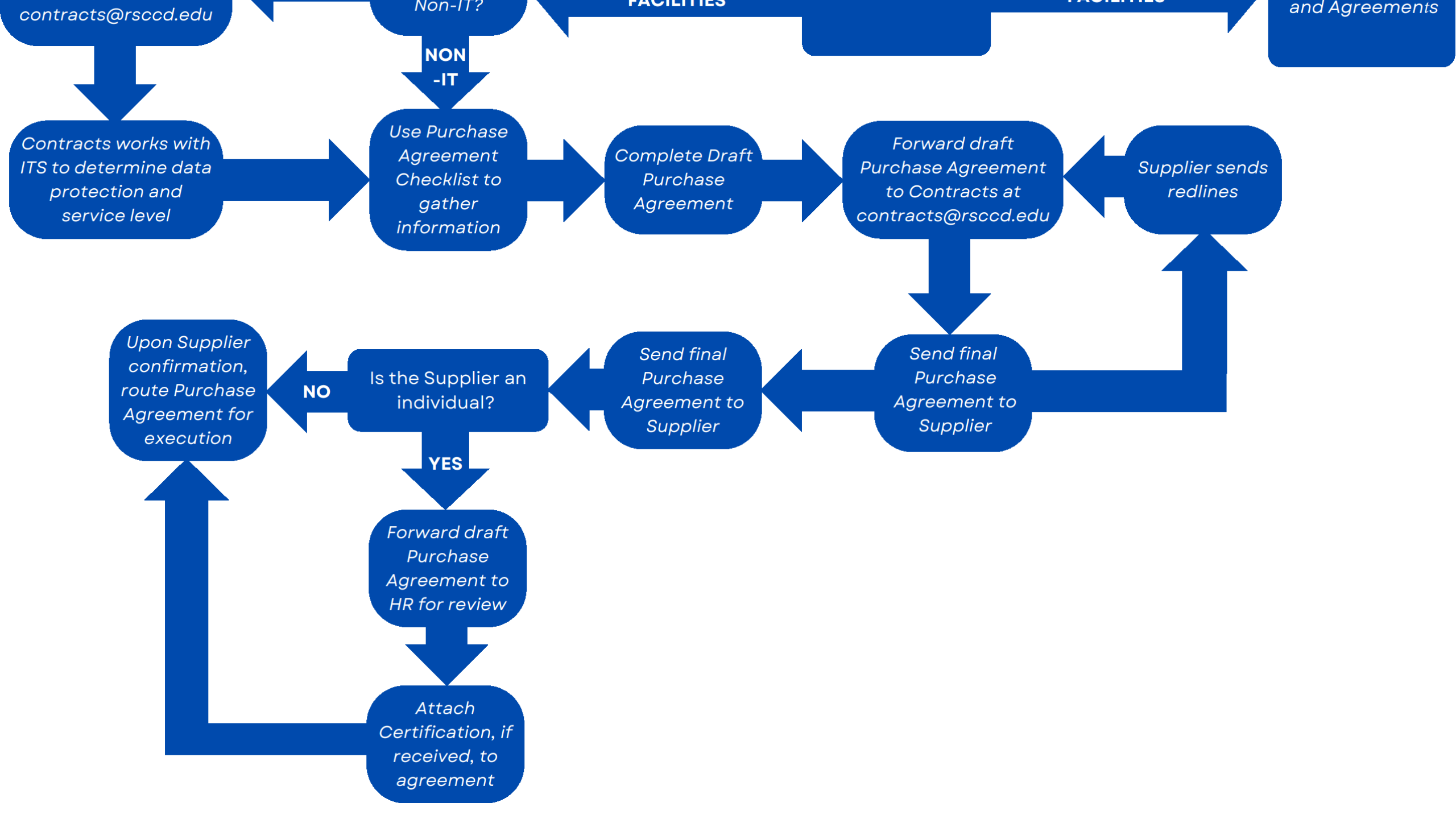
Upon Supplier confirmation, ...

Is the Supplier an ...

Send final Purchase

Send final Purchase





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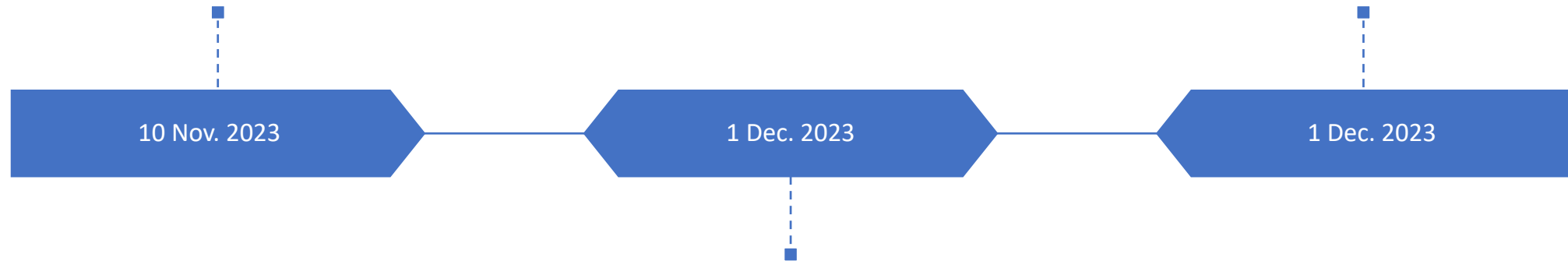
- Contract Guide
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Implementation

New Purchase Agreement and Statement of Work is available on the intranet
NOVEMBER 10, 2023.

Current agreements in work can still be used but transition is expected to occur no later than January 16, 2024.



Purchase Agreement and Statement of Work to be fully utilized January 16, 2024.

Final Thoughts



Follow your college's standard operating procedure for contract execution. Signatory authority is specifically delegated for specific processes and thresholds.



These are internal documents. The Supplier should only see the finished product.
DO NOT GIVE TO THE SUPPLIER TO COMPLETE.



While this template helps ease the contract review process, please remember that **YOU** are responsible to administer your contract. Please ensure you are familiar with the agreement in its entirety.



Questions

Need assistance?

Contact Contracts@RSCCD.edu
