RANCHO SANTIAGO
Community College District
2323 N. Broadway, Room 109, Santa Ana, California 92706-1640
Purchasing Department • Phone: (714) 480-7370 - Fax: (714) 796-3907

Professional Service Agreements Quick Guide

Determine your need and draft a scope of work.

Contact prospective vendor(s).

Negotiate scope of work and fees/payments and review the terms and conditions, and insurance requirements with selected vendor. Obtain W9 for new vendors.

Administer the "A, B, C Test"

Complete the Professional Services Agreement document and have the vendor sign.

Identify funding—Professional Service Agreements must be charged to a 5100 (Personal and Consultant Services) object code

If your need has a technology component, the project must be discussed with and approved by ITS. ITS will provide a certification of approval if the scope of work meets District requirements.

District Insurance requirements can be found on the Employee Intranet. Questions? Contact Risk Management.

If the vendor is a corporation and not an individual, proceed without HR certification.

Submit completed, vendor signed agreement to Human Resources for verification that the individual may be hired.

If not okay to proceed, Human Resources will contact the requesting department to provide explanation and options.

If okay to proceed, Human Resources will attach certification and return all documents to department.

$14,999.99 and under

Obtain District signature from the Vice Chancellor, Business/Fiscal or refer to AR 6150, Designation of Authorized Signatures. *Signed HR Certification must be attached for individuals.

Speaker Agreements to be signed by the Director of Purchasing Services will be countersigned once the Purchase Order has been issued.

$15,000 and over

Prepare and submit docket for Board approval, including only the docket cover and agreement. Ensure agreement is signed by vendor prior to submittal. Submit hard copy *including the HR Certification for individuals* to the Vice Chancellor of Business and Fiscal Services to sign once Board Approved.

Generate a Purchase Requisition and submit with **ALL** backup documentation to Purchasing Services via email and reference the PR number in the subject line. All items should be submitted to Purchasing Services no later than 14 days prior to the start of the agreement.

No vendor is to begin ANY type of work until they receive the Purchase Order.