



Agreement/Contract Approval Routing Sheet

DATE: _____

Note: All Agreements/Contracts Require Board Approval

<u>Person submitting agreement</u>	<u>Location</u>	<u>Initials</u>	<u>Corresponding goal number(s)</u>
Originator _____	School Site / Location _____	Initials _____	
			LCAP Goal
<u>Legal name of vendor</u>	<u>What the agreement is for</u>	<u>Total amount of contract</u>	
Name of Company _____	Type of Service / Event _____	Contract \$ Amount _____	

Checklist

- Agreement signed by vendor **Make sure the agreement is signed by an authorized signatory of the vendor.**
- Exhibit A (Pricing) and Exhibit B (Scope of Work) **If not using the CVUSD Agreement, Exhibit A & B do not need to be labeled as such, but information must be included in the document.**
- Vendor proposal attached **Make sure vendors proposal does not conflict with CVUSD Purchasing Terms and Conditions.**
- Vendor fee schedule and/or service schedule attached **Should include all expenses broken out as necessary.**
- Vendor proof of insurance attached **Certificates must be current and cover the event/service period. The certificate holder is listed as Conejo Valley Unified School District, not a site or a specific person.**
- Additional supporting documents attached: Any specific licenses needed, quotes, proposals, etc.

**On CVUSD Agreement, double check that line items 5a., 5b., 5c., and 5d. are all completed.*

Route in Order:

Principal: Signature _____ Comments: Principal approves before documents are submitted to Director _____
Initials / Date _____

Director: Signature _____ Comments: Director approves before documents are submitted to Risk Mgr. _____
Initials / Date _____

Risk Mgt: Signature _____ Comments: Risk Mgr. approves before documents are submitted to Purchasing _____
Initials / Date _____

Purchasing: Signature _____ Comments: Purchasing Director approves and returns documents. If any additions or corrections are needed, they will be noted here. _____
Initials / Date _____

Administrative approval must be received before a Board Report is created.

ADMINISTRATIVE APPROVAL: (only one approval required)

Mark McLaughlin _____
Superintendent

Jeanne Valentine _____
Assistant Superintendent of Human Resources

Victor Hayek _____
Deputy Superintendent of Business Services

Lou Lichtl _____
Assistant Superintendent of Instruction

Lisa Miller _____
Assistant Superintendent of Student Support Services

Board of Education Approval Date: _____/_____/_____