

Contracts & Agreements

Process for Submission of Contracts and
Agreements

Presented by Fiscal Services,
Business Services Department

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Contract/Agreement Check List

Almost all services require a contract or agreement prior to the start of services being rendered regardless of their fund source. If in question about whether a contract/agreement is required, please contact the Business Services Office at 909-382-4085.

Examples of services requiring a contract/agreement: Memorandum of Understanding, bus/van rental, maintenance/repair from an outside vendor, independent contractor, consultants, performance by an individual or group, speaker, entertainment, catering, advertising, banquet room rental, block hotel room rental; i.e., almost all items being charged to 51xx.xx, 56xx.xx, 58xx.xx series object codes and some of the 55xx.xx series object codes.

Information and/or documents required in order to be submitted for signature and Board of Trustees approval/ratification process:

- Three original contracts signed by the Contractor. Either a contract generated by Contractor or the district template contract is usually acceptable. *(Note: Independent Contractor agreement or Performance/Speaker agreement must include all eight pages with original signatures signed by the vendor. Professional Services Contract, Independent Contract or Performance/Speaker Agreement must have Resume, Vita or Bio that state how they are qualified. Advertising agreement must have copy of the advertisement with agreement. These are district forms and have been updated as of 02/08/2007.*
- Funding source for this contract expense; i.e., budget number or Trust or Club Account Name
- Contract starting and ending date (all contracts/agreements must have a start and ending date)
- If required, the certificate of insurance
- Name and phone number for employee who is the contact for this agreement/contract in case of Club this would be club advisor. **This must be an employee of the campus/district.** *(hourly/short-term/substitute or adjunct faculty employees or students will not be accepted)*
- The department, division, club, or trust generating the contract
- Contractor's mailing address, phone and contact person and copy of W-9
- If the contract is associated with a campus event, the event's board approval date is required. *(Note: The event must be approved by the board prior to any contract being signed or approved. These processes will usually require three months prior to the event to get all approvals completed.)*
- If contractor requires a Certificate of Coverage from the District, a request of COI form must be filled out and sent to Business Services Department with the contract package. The form can be found on the District web site under Fiscal Services then under Business Services www.sbccd.cc.ca.us list as COI Request form
- If the District requires a Certificate of Coverage from the contractor, please have them send it to the District address in care of the Business Services. This must be received by the district prior to the contracted services are started.

- A Financial 2000 purchase requisition number in the approval process will need to be sent to Business Services Office along with the three original contracts. *(the contract/agreement will not be signed without the purchase requisition number)* Note: purchase requisition (PR) in approval process means the following, the PR must have been sent to the next person in the approval path from the person who entered the PR in the system.
- If a trust account is the funding source, a copy CBO Request with all the required signatures must accompany the contract/agreement. If a club account, a copy of the club minutes will also be required.
- The above items must be completed and the contract/agreement signed by a Board approved authorized signer prior the start of any service or work. Please review Board Policy and Administrative Regulations 6340 & Contracts and 6330 Purchasing.
- Please send all required documents and information to Business Services located at the District Office *(Any contract/agreement missing any of the information listed above will be returned without being processed)*

Attached is the Business Services Board Agenda Item due dates for the Calendar Year 2009.

Please note the following: Contracts may not begin prior to Board Approval and signature. In cases of emergencies you must contact the Business Manager.

Contract packets that are missing information, do not have funding, are under funded and/or are incomplete will be returned to the department **unprocessed** and will not be sent to the board for approval. A memo will be attached requesting the necessary information and/or documents. This will start the contract/agreement submission process over from the beginning. ***Only complete contract/agreement packets that are submitted on time will be guaranteed for submission to the next available Board meeting for approval.***

Please note that no payment can be processed without the contract/agreement having been approved by the Board of Trustees. (See Board Policy 6340, Administrative Regulation 6340)

In order to help you with this process, the Business Services Department has made available to you a copy of the Contracts & Agreements handbook on the District web-site www.sbccd.cc.ca.us. Go to District Faculty and Staff Information/Forms. Then go to Business Services Forms and Information page and lastly then go to Contracts. On this web page, we have listed the forms and information needed to complete a contract packet. You will also find examples of District contract templates, Contract Check list, Contract Cover Page form and contract handbook. Please read and follow all directions listed on the forms.

Thank you.

Board Agenda Deadlines

2009 Business Services

Contract/agreement packets must be received by the Business Services Department by the date and time listed below for that corresponding Board Meeting Date to be guaranteed submission for board approval. Any Item(s) received after the date and time listed may be sent to the next available Board Meeting for approval. Any incomplete item will be returned unprocessed and will not be scheduled for Board Agenda placement.

| Board Meeting Date | Due Date to Business Services | Time Due No Later Than |
|---------------------------|-------------------------------|------------------------|
| January 15, 2009 | December 5, 2009 | 4:00 p.m. |
| February 12, 2009 | January 09, 2009 | 4:00 p.m. |
| March 12, 2009* | February 04, 2009 | 4:00 p.m. |
| April 09, 2009 | March 04, 2009 | 4:00 p.m. |
| May 14, 2009 | April 08, 2009 | 4:00 p.m. |
| June 11, 2009 | May 06, 2009 | 4:00 p.m. |
| July 09, 2009 | June 03, 2009 | 4:00 p.m. |
| August 13, 2009 | July 08, 2009 | 4:00 p.m. |
| September 03, 2009 | July 29, 2009 | 4:00 p.m. |
| October 08, 2009 | September 02, 2009 | 4:00 p.m. |
| November 05, 2009 | September 30, 2009 | 4:00 p.m. |
| December 10, 2009 | November 02, 2009 | 4:00 p.m. |
| January 2010 (TBA) | December 02, 2009 | 4:00 p.m. |

* Revised Date: Date changed from March 26 to March 12

San Bernardino Community College District Contract Templates

Contract Templates may be found on the District web site under Fiscal Services the under Business Services

When to use which template:

Independent Contract Template:

This template is used when an outside person or agency is going to produce a finish product (i.e. report, working document, Research Data or other type's product document)

Performance/Speaker Template:

This template is used for individuals or groups who are to give a speech, or performance. (i.e., guest speaker, musicians, actors, presenters, workshop presenters)

Professional Services Template: (On Request not found on Web Site)

This template is used for Professionals for who the District needs their specialized services for a specific project. This contract is use for those professionals who by industry standers are pay by the hour or through a rate schedule (i.e., Doctors, Attorneys, Investigator, Engineers, and etc.). If you think you will need this contract please contact Business Services office to obtain the Professional Services Template.

Business Services Contact Information

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Business Manager

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San Bernardino, California, 92408

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