

COMPTON UNIFIED SCHOOL DISTRICT
Business and Administrative Services Division
Purchasing, Contracts, Reprographics, & Warehouse Department

BULLETIN NO. 24/25-1013

JANUARY 24, 2025

TO: Department Heads, Principals, Administrators, and Supporting Staff

FROM: Contracts Analyst, Purchasing Department

RE: REFERENCE GUIDE FOR AGREEMENTS AND CONTRACTS - PROCEDURES AND REGULATIONS

To All CUSD Employees,

The Purchasing and Contracts Desk provides this Bulletin as a reference guide. The attached is compiled to assist you in submitting accurate and complete contractual agreements. Performing the instructions noted will ensure a smooth completion of this process.

Please, plan ahead to allow time for the completion of the entire Agreement Packet, in order to meet completion within the contract process timeframe. Allow vendors/consultants to provide board-approval services and resources.

It is important for CUSD Employees to have an understanding of Procurement Policies and Procedures, to follow the organization's procurement policy, to ensure compliance with applicable laws, regulations, and ethical standards, and to stay updated on policy changes and new procurement guidelines.

- Only the Superintendent or CAO enter into a formal agreement for the District
- Negotiations with Vendors/consultants are limited – no prepayment for services
- Department Supervisors and Principals are not authorized to sign any documents, this includes quotes, proposals, and scope of work. These documents are considered contracts.
- Anything that requires a signature must go to the Board for approvals
- The vendor/consultant must sign the contract before presenting them to the Board
- The vendor/consultant must supply their Certificate of Insurance (COI) before presenting it to the Board.

Note: Use the Purchasing and Contracts webpage for associated Bulletins, Forms, and Links. Should you require assistance or have any questions, please contact the Contracts Office at extension 55051.

Approved:

Shannon Soto, Ed.D.
Deputy Superintendent/CAO
Business and Administrative Services

Approved:

Darin Brawley, Ed.D.
Superintendent

Purchasing and Contracts Department and Educational Services Department Reference Guide: Contracts and Agreement Procedure

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INTRODUCTION

This Reference Guide is available for all Compton Unified School District (CUSD) employees to use in assisting with:

- Submitting an Agenda Item to BoardDocs; Board Meeting tracking system
- Submitting an Agreement Packet to the Contracts Desk
- Basics to CUSD Chart of Accounts
- Basics to the B.E.S.T. system; procurement tracking software

Follow established timelines for Board Agenda submission per the direction of the Superintendent's Office. Refer to your Division Head and/or Division Head Secretary.

AGREEMENT PACKET

The **Agreement Packet** contains all documents pertaining to a contract/agreement that the department is presenting or presented to the Board for approval. Please see the attached "Inter-Department Contracts Checklist" and the "Flow chart."

The checklist will assist in making sure all necessary documents are included. The Flow Chart offers a suggested order to the agreement flow for timely processing.

- Print a **checklist**, gather documents accordingly, get vendors signature: request COI, W9, etc.
- Don't forget to include all pertaining information in the **XREQ**, All contract-related requisitions are "service" and not "item" requisitions.
- Get an agenda item number, enter it into **BoardDocs**, let it go through the approval tree...
- Send the agreement packet to the **Contracts Desk**. Contracts will be signed by the Superintendent or the Chief Administrative Officer
- The Contracts Desk will get final signatures, information, etc., and email/share the completed/**fully executed agreement** to the requesting department.

The Contracts Desk suggests that your team request invoices, match invoices to purchase orders, and when your department has received all services and/or products forward invoices (with PO number and Supervisor signature of approval) for timely and accurate payment to vendors.

BOARDDOCS

CUSD utilizes BoardDocs® software to manage its monthly board meetings. Any documents requiring approval from the CUSD Board must be submitted as an Agenda Item in BoardDocs, formatted in accordance with the District's established protocols.

Department Supervisors, Administrators, and Principals: Agenda items must be written by department and school site supervisors, not by supporting staff. However, supporting staff should assist in submitting the item, managing the approval process, and ensuring that all inquiries are addressed and the agenda item is clear and well-prepared.

Include legal status and TIN number after Board Approval on Contract (Omit this information when submitting to Board). It is recommended for the Contract to be dated at least one day AFTER Board Approval.

Refer to the examples below for proper formatting of a Consultant Agreement-related Agenda Item.

12/18/24, 2:38 PM

BoardDocs® Pro



Agenda Item Details

Meeting	Dec 10, 2024 - Regular Meeting of the Board of Trustees
Category	M. ACTION - BUSINESS/CONSENT ITEMS (Routine Matters) - Consent Items are considered routine and will be enacted, approved, and adopted by one motion unless a request for removal, discussion, or explanation is received from any Board Member or member of the public in attendance.
Subject	6. 24/25-1244 - Consultant Agreement - Performing Arts of Los Angeles County, dba The Music Center (ELL Department) ***APPROVED***
Type	Action (Consent)
Fiscal Impact	Yes
Dollar Amount	2,175.00
Budgeted	Yes
Budget Source	LCFF: 010-08000-0-11105-10000-5810-7900000-0000
Recommended Action	The Superintendent recommends that the Board of Trustees approve the Consultant Agreement with the Music Center of Los Angeles to conduct performances for CUSD students. Effective December 13, 2024-January 31, 2025.

BACKGROUND

The Music Center is a world-renowned performing arts group, including the LA Philharmonic and the LA Opera. In partnership with local LEAs, the Music Center further supports promoting performing arts through its education division. Specifically, the Music Center on Tour Educational Program seeks to introduce students to the world of performing arts through presentations that model excellence, cultural diversity, and rich educational content. The English Learner Department, in collaboration with the Music Center, will host performances for students from the following schools: Carver ES, Kelly ES, Kennedy ES, Emerson ES, Dickison ES, Davis MS, Bunche MS, Whaley MS, and Centennial HS.

ANALYSIS

Students will listen to folklore, mythology, and literature in an oral storytelling format and learn the processes of language and acting as art forms, including artistic perception and creative expression. Students will understand the role of oral storytelling within various cultural groups, identifying key geographical and topographic features of story settings. Additionally, students will engage in academic discussions regarding program content at the conclusion of the performance. They will be given the opportunity to summarize the performance content verbally and in written format. Lastly, students will understand and apply the historical and cultural context of the performance to folktales from their own culture.

Exposure to the oral storytelling traditions of culturally and linguistically diverse groups will make learning more engaging and accessible. Overall, exposure to oral storytelling and culturally relevant musical performances will create a more inclusive educational environment where students see themselves reflected in the curriculum, feel valued, and develop important social and emotional skills.

STUDENT ACHIEVEMENT IMPACT

Exposure to oral storytelling traditions from culturally and linguistically diverse groups can positively impact student achievement. This type of performance fosters critical thinking and problem-solving skills as students interpret and engage with narratives that align with classroom instruction. Furthermore, oral storytelling incorporates rich language

Refer to the examples below for proper formatting of subject lines in agenda items.

Type of Agenda Item	Subject Line Format
Consultant Agreement	18/19-5105 - Consultant Agreement - Enviro-Guide, Inc. (Hazardous Waste Program) (Risk Management)
Affiliation Agreement	18/19-1067 - Affiliation Agreement - Theatre of Hearts, Inc. (Bunche Middle School / School and Community Partnerships)
Amendment for a Consultant Agreement	18/19-3033 - Consultant Agreement - Amendment No. 1 to Item No. 18/19-3009 (09/11/18) - Los Angeles County Office of Education (Personnel Commission)
Ratification for an Affiliation Agreement	18/19-1361 - Ratification - Affiliation Agreement - Communities in Motion (School Readiness Summit) (Family Engagement Center / Special Projects)
Ratification for a Consultant Agreement	18/19-5019 - Ratification - Consultant Agreement - Haslyn Miller (DBA: Umobli Technology, LLC) (Emergency Preparedness Services) (Risk Management)
Software Agreement	18/19-4049 - Software Agreement - Colbi Technologies, Inc. (Software Services to Accountability and Colbi Docs) (Facilities, Maintenance, Operations, and Transportation)
MOU	Memorandum of Understanding between Teamsters Local 911 and Compton Unified School District (Human Resources)
Acceptance of Bid	18/19-4050 - Acceptance of Work - Bid No. 02(17-18)FP - Pacific Tennis Courts, Inc. (New Tennis Courts at Dominguez High School) (Facilities, Maintenance, Operations, and Transportation)
Utilization of Piggybackable Bid	18/19-1291 - Utilization of Piggybackable Bid - Advanced Exercise (Procurement of Weight Room Equipment and Related Products for 2018-2019 School Year) (Centennial HS / Educational Services)

("Board Agenda Items – Subject Line Examples" C.Ellington 06/2019)

Type of Agenda Item	Subject Line Format
Travel	18/19-1326 - Travel - Stanford University in Palo Alto, CA, Georgetown University in Washington, D.C. and Princeton University in Princeton, NJ (Junior State of America (JSA) Summer School Program) (Compton Early College HS, Centennial HS, Compton HS and Dominguez HS / School and Community Partnerships / Educational Services)
INFORMATION	INFORMATION - Williams Settlement Implementation Project - 3rd Quarterly Report on William Lawsuit Settlement Uniform Complaints 2018-2019 (Accountability & Compliance) (Human Resources)
PRESENTATION	PRESENTATION - Chavez Continuation and Marshall High School - Tony Hua (Educational Services)
RECOGNITION	RECOGNITION - Snap Chat Employee Day of Service (Centennial High School / School and Community Partnerships / Educational Services)
RECOGNITION	RECOGNITION - Compton Unified School District Teacher of the Year (Educational Services)
RESOLUTION	18/19-2057 - RESOLUTION NO. 18/19-42 - Proclaiming May 8, 2019 as California's Day of the Teacher (Human Resources)
PUBLIC HEARING	PUBLIC HEARING - 2016/2017 Annual Budget Plan and Service Plan of the Office of Special Education for the Compton SELPA (Office of Special Education - Compton SELPA)
Other	18/19-2056 - Certificated Personnel Actions (Human Resources)

("Board Agenda Items – Subject Line Examples" C.Ellington 06/2019)

BEST© SYSTEM

CUSD uses BEST Software to create and manage Purchase Orders. It is essential to submit accurate requisitions (XREQ) that include all relevant supporting documents. Providing complete information ensures that all departments in the approval workflow have the necessary details to review and approve the requisition at each level.

District protocol requires all contract-related requisitions to include the following information to ensure efficient and accurate routing and processing:

- **Type of Agreement**
- **Effective Date** (Period of Performance Dates)
- **Board Approved Date**
- **Agenda Item Number**
- For **Multi-Year Agreements**, specify the current year of the agreement in the requisition description.

Including all the information mentioned above ensures the efficient processing of the requisition and guarantees that it is routed to the Contracts Desk for accurate handling.

The following documents are required by LACOE and should be attached to the Header section of the Requisition (XREQ);

- Board Certified Report
- 'Approved' Board Agenda Pages
- Vendor/Consultant Signed Agreement
- Detailed pricing: quote, proposal, etc. itemizing pricing

Depending on the workflow of the Agreement Packet, your department may not have all the items listed above. It is recommended to include whatever information is available. All departments on the approval tree understand the completed agreement packet will not be accessible until the Purchase Order (PO) reaches Final status.

VENDOR SELECTION AND MANAGEMENT

Departments and School Sites have autonomy in conducting market research to identify and evaluate potential vendors/consultants based on criteria like price, quality, reliability, and compliance. Obtaining at least 3 quotes is suggested. The CUSD Purchasing Department, including your assigned Buyer, is available to assist in obtaining Requests for Quotes (RFQ) for your project.

The Purchasing Department ensures fair competition and a transparent selection process, ensuring purchases are within approved budgets, that prices have been negotiated and payment terms follow procurement protocols.

Important Notes

1. Payment Policy

- Compton Unified School District does not prepay for services or products, nor does it make payments for partial orders.
- Payments are issued only after services have been fully delivered and meet the District's satisfaction.

2. Authority to Sign Agreements

- Only the Superintendent's Office is authorized to enter into agreements on behalf of the District.
- Department supervisors, administrators, principals, and supporting staff **must not** sign quotes, scopes of work, proposals, contracts, or any other documents requiring a signature; except the invoice.

3. Definition of Agreements

- All documents requiring a signature, including quotes, scopes of work, proposals, and contracts, are considered agreements.

4. Representation of the District

- All school sites and departments act as representatives of the Compton Unified School District and must adhere to these policies.

In accordance with **CUSD Bulletin No. 22/23-1003** (July 14, 2022), any service, supply, or equipment received from a vendor before an authorized purchase order is issued to the vendor to execute previously described matter(s) will be considered an unauthorized purchase and is deemed an unethical procurement practice.

OVERVIEW OF CHART OF ACCOUNTS

CHART OF ACCOUNTS

This is a short introduction to the structure of an accounting string. All information has been taken from the CUSD reference guide, Chart of Accounts

Chart of Account – A list of accounts, systematically arranged, and applicable to a specific organization. All account names and numbers are listed in order. Coding is structured to isolate programs, goals, functions, and/or objects of expenditure.

FUND (2 + 1)	RESOURCE PROJECT YR (5 + 1)	GOAL (5)	FUNCTION (5)	OBJECT (4)	SCHOOL LOCATION (7)
XX.X	XXXXX.X	XXXXX	XXXXX	XXXX	XXXXXXX

The **Standardized Account Code Structure (SACS)** is comprised of 6 fields consisting of 30 digits. Each field is designed to categorize revenues, expenditures, assets, and liabilities by specific groups. The grid shows the SACS string and the 6 fields within the accounting string.

Funds – A fund is an accounting entity with a self-balancing set of accounts recording financial resources and liabilities. It applies to revenue, expenditure, and balance sheet accounts. There is no change to the existing fund structure and definition.

Resources – a six-digit field that tracks activities funded with revenues that have restrictions on how funds are to be spent and that distinguishes the activities of those federal projects that span more than one fiscal year. It applies to revenues, expenditures, and balance sheet accounts.

Goals – this important, five-digit field accumulates costs by instructional goals and objectives. This field provides the framework for charging instructional costs and direct support costs directly to the designated instructional program with the introduction of the Local Control Accountability Plan (LCAP), the district has established five (5) goals for both instructional and non-instructional.

Function – This five-digit field describes activities or services performed to accomplish one or more objectives in the goal field. All expenditures must have a function. The function field relates to our current program and location accounts. It defines the services we provide to our students and community: Direct Instruction or Instruction Support. The Direct Instruction Function includes classroom teachers, instructional aides, and items purchased for use by students in the classroom. This field applies only to expenditure accounts.

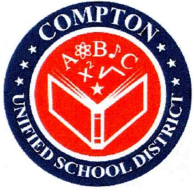
Objects – a four-digit field that classifies revenues by general sources and types of expenditures according to types of items purchased or services obtained. This field applies to revenue, expenditures, and balance sheet accounts and is used to generate financial statements. No transaction can be entered without a defined object.

School/Location – a seven-digit field that designates a specific school structure or group of structures, that form a campus as identified in the California Public School Directory, Existing location codes will be amended to adhere to the range values assigned at the State level.

General Fund – The fund used to finance the basic operations of the school district. It is available for any legally authorized purpose of the district.

Restricted Revenue – Restricted funds are those moneys for which the grantor has imposed some conditions on how the moneys are to be spent.

Attached: Inter-Department Contracts Checklist
 Flow chart – contracts agreement
 Insurance Requirement for CUSD Form



INTER-DEPARTMENT CONTRACTS CHECKLIST PURCHASING & CONTRACTS DEPARTMENT

Type of Agreement: _____

Agenda Item Number: _____

Board Approved on (Date): _____

Check that all items are included in your Agreement Packet:

- ☐ **One (1) copy** of the **Agreement Packet** (original documents, wet signatures, in color)
- ☐ **Certified Board Agenda Report** page and **Approved Agenda Item Detail** page – clean and unmarked
- ☐ **Wet Original Signatures** on Agreement(s)
- ☐ **Certificate of insurance (COI)** current and listing CUSD as certificate holder (all pages)
Reference form "Certificate of Insurance Requirements" on CUSD - Purchasing's webpage for details
- ☐ **Certificate of insurance (COI)** – Endorsement page
- ☐ **Scope of Work, Quote or Proposal**, detailing pricing
- ☐ **W9**, signed and dated in the current year
Reference Template "W-9 Form" on CUSD – Purchasing's webpage for details
- ☐ (if Available) **Requisition** ID number: _____
- ☐ **Check box if you would like** a time-stamped receipt of this Checklist from the Contracts Desk once all agreement items are processed and distributed.

Please review the instructions page of the Contract Checklist and include this completed Checklist page with each **Agreement Packet** submission.

Mail/drop off to the **CUSD District Office, Attn.: Purchasing Dept. – Contracts Desk**

Requestor Name

Department/School Site

INSTRUCTIONS FOR CONTRACTS CHECKLIST:

The **Requestor** is the person submitting the Contract Checklist, and the **Agreement Packet** and will be identified as the contact person for the documents submitted to the Contract Analyst. When processing of the agreement packet is complete, it will be emailed to the **Requestor**.

If the **Requisition** is not generated by the **Requestor**, share the following information with the person completing the requisition data entry: In the additional commodity field, be sure to enter the Agenda Item Number, Board Date, and Type of Agreement. The **Requisition** must contain this information to be effectively and efficiently forwarded to the Contracts Desk. The **Requisition** can be submitted prior to the scheduled Board Meeting date. If this is the case, please indicate, "*Pending Board Approval MM/DD/YEAR*," in the additional commodity field on the **Requisition**.

The **Agreement** must be signed by the **Vendor** and **District Representative** before the Board Meeting. CUSD protocol is for the Superintendent's office, Chief Administrative Officer, or authorized designee, to sign the Agreement after it has been approved by the CUSD Board of Trustees. Although there may be special exceptions to this rule, the standard protocol is for Agreements to be signed by the Superintendent's office, Chief Administrative Officer, or authorized designee, after the Board's review.

***Please, leave it to the Contract Analyst to obtain the Superintendent's, or authorized designee's signature. The Superintendent's office will sign the original agreement copy provided in the Agreement Packet submitted.**

The Approved **Agenda Item** detail page and **Certified Agenda** page are available after the Board Meeting and are posted online by the Superintendent's office. The Agreement received cannot be formally executed (processed) without these board-certified documents.

A **Certificate of Insurance (COI) and Endorsement** is a standard requirement for the majority of agreements. Exceptions to this standard must be approved/authorized in writing by the Superintendent's Office, Chief Administrative Officer, or authorized designee. Exceptions to COI requirements are rare.

A completed **W9** should be included with the agreement packet, whether the agreement has a cost to the District or not. The District's Agreements are legal and binding documents. The W9 helps to ensure the data entry in the agreement is correct.

***Please note, do not include personal identification numbers (such as social security numbers or TIN numbers) in the agreement attached to BoardDocs since all documents are open to the public once posted on the District's website. This information should be filled out after the Board Meeting and before submitting the agreement packet to the Contract Analyst's desk for execution (processing).**

Links for all agreement templates, and forms, can be found on the Compton USD website:
www.compton.k12.ca.us/departments/business-services/purchasing-contracts/forms-and-links

If you have any questions or concerns, please contact the Contract Analyst or the Director of the Purchasing Department.



Department of Purchasing, Contracts, Reprographics and Warehouse

gather documents

print a checklist, gather documents, get vendors signature: request COI, W9, etc.

generate XREQ

don't forget to include all pertaining information. All contract related XREQs are service under the commodity section.

go to BoardDocs

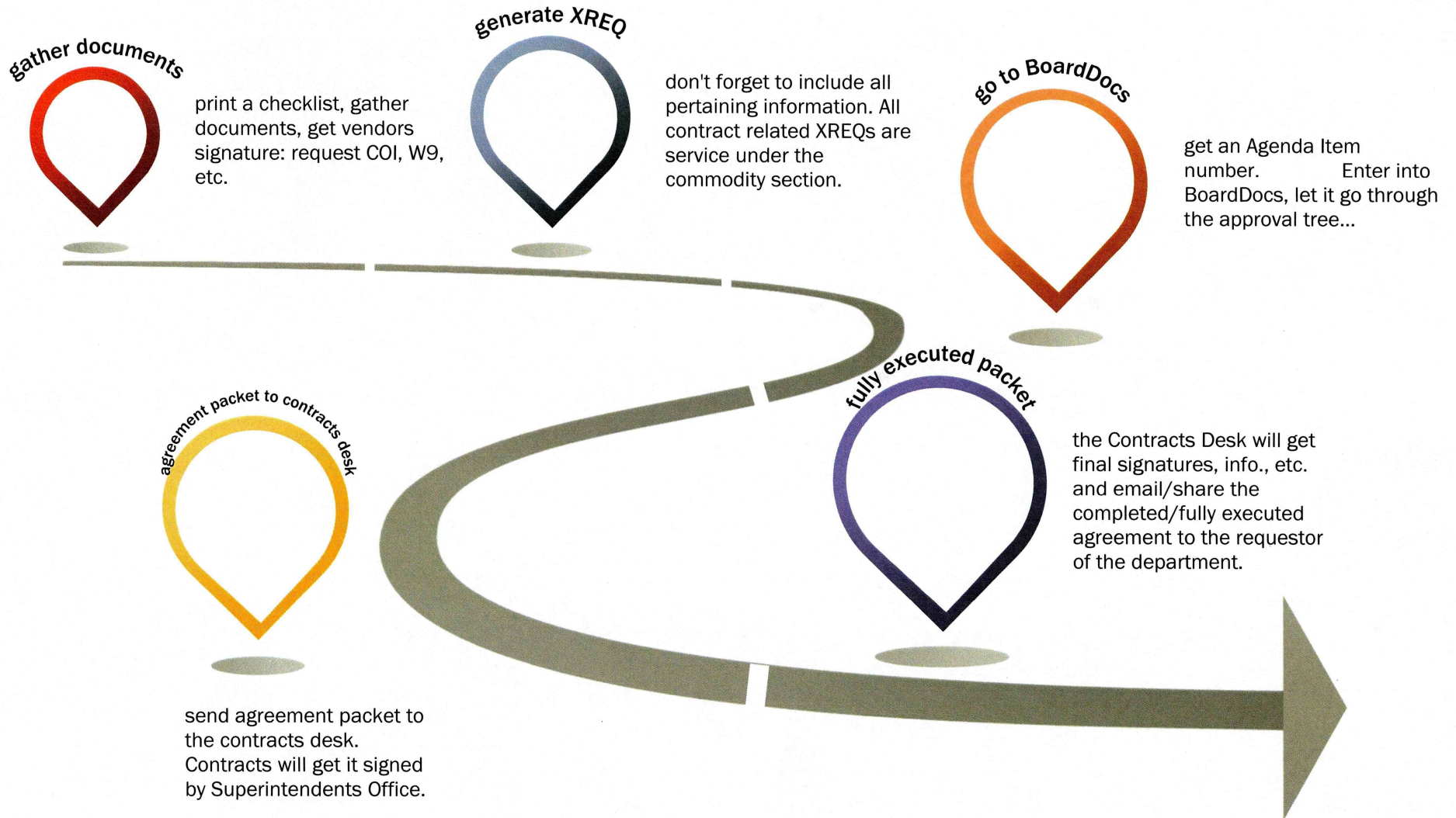
get an Agenda Item number. Enter into BoardDocs, let it go through the approval tree...

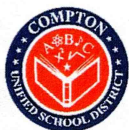
agreement packet to contracts desk

send agreement packet to the contracts desk. Contracts will get it signed by Superintendents Office.

fully executed packet

the Contracts Desk will get final signatures, info., etc. and email/share the completed/fully executed agreement to the requestor of the department.





Insurance Requirements for Compton Unified School District

Type of Coverage

Minimum Coverage Limits

Commercial General Liability (CGL) ISO form CG 0001 10-93, or other forms acceptable to District	Bodily Injury, Property Damage, or Combined Single Limit (CSL)	Occurrence \$1,000,000 \$	Aggregate \$1,000,000 \$
Business Automobile Liability (BAIL) Including coverage for claims arising from the ownership, operation, loading, and unloading of owned, hired, leased, non-owned, and/or borrowed private passenger and commercial vehicles.	Bodily Injury, Property Damage, or Combined Single Limit (CSL)	Individual \$1,000,000 \$	Accident \$ \$
Environmental Impairment Liability (EIL) Including coverage for claims arising from handling, abatement, and transport of pollutants including asbestos and lead paint.	Bodily Injury, Property Damage, or Combined Single Limit (CSL)	Occurrence \$ \$	Aggregate \$1,000,000 \$
Sexual Misconduct <i>*Required for vendors having contact with students.</i>	Bodily Injury, Property Damage, or Combined Single Limit (CSL)	Each Claim \$2,000,000	Aggregate \$
Professional Errors and Omissions Liability (E&O)	Bodily Injury, Property Damage, Financial Losses, or Combined Single Limit (CSL)	Each Claim \$1,000,000 \$	Aggregate \$ \$
California Statutory Workers' Compensation Including Employer's Liability (and United States Longshoreman's & Harbor workers, where applicable)	Bodily Injury, Property Damage, or Combined Single Limit (CSL)	Employee \$1,000,000 \$	Aggregate \$ \$
Crime or Fidelity Coverage Including fraud, theft, dishonesty, and disappearance	Financial Loss	Each Claim	Aggregate
Fiduciary	Financial Loss	Each Claim \$1,000,000	Aggregate \$
Cyber Liability Including coverage for claims arising from data breaches, stolen or damaged intellectual property, and/or other cybersecurity-related events. <i>*Required when sharing/downloading software onto the CUSD network and/or accessing software with CUSD devices.</i>	Bodily Injury, Property Damage, or Combined Single Limit (CSL)	Occurrence \$1,000,000 \$	Aggregate \$1,000,000 \$

Insurance required above shall be primary with respect to the Compton Unified School District (CUSD), its trustees, administrators, representatives, agents, and employees, respectively, and any other insurance effected or procured by CUSD shall be excess of and shall not contribute with the required insurance. These policies, with the exception of Workers' Compensation, Employer's Liability, and Errors and Omissions coverages, shall name CUSD, its directors, officers, agents, representative, and employees as additional insurers with respect to work performed pursuant to or incidental to this contract. ISO Form CG 2010 11/85, or other forms acceptable to CUSD shall be used. Severability of interest (cross liability) and waiver of subrogation clauses shall be included. Pursuant to the terms of this contract, insurance effected or procured by Contractor shall reduce or limit Contractor's obligation to indemnify and defend CUSD for claims made or suits brought which result from or in connection with the performance of this contract. These coverages, when written on an occurrence form, shall be maintained during the entire term of the contract. Coverages written on a claims-made form, and all Errors and Omissions Liability and Environmental Impairment Liability Coverages, shall be maintained during the entire term of the contract and further until one year following termination and acceptance of all work under the contract.

The Contractor shall, before commencing work under this contract, arrange for the delivery of a certificate of insurance completed by its insurance carrier, agent, or broker certifying that at least the minimum insurance coverages required above are in effect and specifying whether the liability coverages are written on an occurrence form or a claims-made form, and that the coverages will not be canceled or changed without thirty (30) days advance written notice to:

Compton Unified School District – Purchasing/Contracts/Reprographics Department – 501 South Santa Fe Ave., Compton CA 90221