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** (printed in color, along with original signatures)

□ **Certified Board Agenda Item** and Approved **Agenda Item Detail** page – clean and unmarked

□ **Wet Original Signatures** on Agreement(s)

□ **Certificate of insurance (COI)** current and with CUSD as certificate holder
Reference form "Certificate of Insurance Requirements" on CUSD - Purchasing's webpage for details

□ **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

□ (As Applicable) **Requisition** copy, if attached enter ID number: _____

□ **Check box if you would like** the Contracts Desk to mail the completed **Agreement Packet** to the vendor.

□ **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)** 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

(CUSD Contracts Desk March 2025 MS/kd)