



2024-25 NO. BS 28

BOARD OF EDUCATION

DATE: February 22, 2024

Subject information: 4441A-0# 344EK
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TO: All Principals, Administrators, Admin Assistants, and Office Managers

FROM: Janea Marking, Chief Business and Operations Officer

Subject information: 44423K
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RE: Contract Procedure Update

Subject information: 34H+H/37/OEK
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The purpose of this bulletin is to provide an update and clarification on the procedures and requirements for the authorization of contracts and agreements with third parties for services. Please note that the responsibility to manage a contract, to ensure its compliant processing, to communicate with the vendor, to transmit invoices, to ensure all documentation is on file, and to oversee that procedures are met - all rests with the department or site.

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At the December 14, 2023 Board Meeting, Business Services provided information on the Contract Procedures Audit conducted by Dannis Woliver Kelly (DWK). DWK reviewed the district's purchasing procedures to ensure compliance and success using best practices and policies to implement adequate controls. The Purchasing Team has implemented procedures as recommended by DWK.

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To avoid a y interruption in service and ensure payment(s) are processed in a timely manner, below are a few important reminders:

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- 1. Cease all services that are not operating with an approved Purchase Order (PO) and do not allow services to begin without a PO
2. Vendors may not perform work that is assigned to a bargaining unit without approval from HR first
3. When providing approved services, vendors must document evidence of meeting all district minimum thresholds for the work to be performed
- This includes insurance, fingerprinting, and background checks
4. Only the Business Services department may legally endorse and approve such contracts and agreements, which are subject to additional review by internal departments and the Board of Education.
5. Approval is not guaranteed; services must be rendered prior to obtaining approval, executing a contract, and receiving a purchase order.
6. All Service Agreement (SA) requisitions are approved online, in Escape, by assigned approvers.

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Payment information:

For approved purchase orders, send a signed invoice to invoices@scusd.edu.

Business Services has established a new procedure for transparency and approval of unauthorized contracts. Beginning in January, in the event that a contractor seeks payment without an approved contract, the payment amount will appear on the Consent Agenda seeking Board approval for payment.

1. Vendors that cannot be approved should provide invoices for the services provided (and work should cease until approved)
2. Departments or sites should contact Purchasing to complete an "Unauthorized Vendor Form" for board approval of payment owed
3. Attach the signed invoice(s) to the vendor form
4. Create a requisition for the total amount owed
5. Vendor will be paid upon board approval

A bulletin with information regarding district 7/27/18 #14, 874" 1850 is coming soon. Several contracts are held up due to not meeting minimum insurance requirements. If you have any contracts that are held up ONLY due to insurance

1. Cease services until insurance is obtained
2. Work with vendor
 - a. Are they likely to get insurance soon for an approved PO? Pay with approved PO
 - b. If payment is needed and they are not likely to get the insurance, submit invoice to Purchasing as an Unauthorized Vendor for payment

For more information, please see the attachments

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Friendly reminder from Business Services regarding Approval of Consultants & Other Contracted Services

To our Staff,

The purpose of this communication is to remind Principals and Department Administrators