



## **CONTRACT ROUTING PROCEDURE (BUS-P008)**

Clarksville-Montgomery County School System

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### **1.0 SCOPE:**

- 1.1 This procedure outlines the process for routing contracts for review and signature by Business Affairs

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

### **2.0 RESPONSIBILITY:**

- 2.1 Chief Financial Officer
- 2.2 Purchasing Director
- 2.3 District General Counsel
- 2.4 Administrative Analytical Specialist

### **3.0 APPROVAL AUTHORITY:**

- 3.1 Chief Financial Officer (CFO)

### **4.0 DEFINITIONS:**

- 4.1 Contract: 1. An obligation, such as an accepted offer, between competent parties upon a legal consideration, to do or abstain from doing some act. The essential elements of a contract are an offer and an acceptance of that offer; the capacity of the parties to contract; consideration to support the contract; a mutual identity of consent; legality of purpose; and definiteness. 2. A legally binding promise, enforceable by law. 3. An agreement between parties with binding legal and moral force, usually exchanging goods or services for money or other considerations.
- 4.2 Originator: An individual who begins the process of creating a contract.
- 4.3 Vendor: A person or business that provides goods or services.
- 4.4 Contractor: Any individual or business having a contract with CMCSS to furnish goods, services, or construction for an agreed-upon price.

### **5.0 PROCEDURE:**

- 5.1 Identify Contract Needed
- 5.2 Dept./school contacts vendor for proposal and/or contract terms.
- 5.3 Vendor submits proposal and/or contract terms.
- 5.4 Does it use a standard District template?
  - 5.4.1 Yes: Dept./school prepares contract on contract template.
  - 5.4.2 No: Dept./school reviews vendor's contract terms and conditions.
    - 5.4.2.1 Items for review:



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- 5.4.2.1.1 Deliverables: What is the vendor required to do? What is the District required to do?
- 5.4.2.1.2 Payment terms (Net 15 days or longer)
- 5.4.2.1.3 Payment method: CMCSS pays only by check.
- 5.4.2.1.4 Indemnification: CMCSS cannot agree to indemnify another party.

5.5 Dept./school completes contract routing form.

5.6 Regular contract: Submit unsigned contract & completed routing form to Purchasing Director.

5.7 Fundraiser: Submit unsigned contract & completed routing form to Business Affairs ISA Accounting Technician.

5.7.1 ISA Accounting Technician reviews and sends to Purchasing Director.

5.8 Purchasing Director assigns contract number, reviews & submits contract to General Counsel for review.

5.9 General Counsel reviews & returns to Purchasing Director with notes if changes are required or with approval if no changes required.

5.10 Purchasing Director contacts vendor to have changes made, if required

5.11 Vendor signs contract once all changes are made and approved.

5.12 Purchasing Director cc's Originator on email to vendor to get signature.

5.13 Originator prepares requisition, enters contract number in Notes.

5.14 Purchasing Director sends contract to Administrative Analytical Specialist, who checks the budget and gives to CFO or designee to sign.

5.15 CFO or designee signs, and Administrative Analytical Specialist scans and sends fully executed copy to General Counsel, Originator, ISA Accounting Technician (if fundraiser), and Purchasing Director. Files original.

5.16 Purchasing Director converts requisition to PO and sends PO and contract to contractor.

5.17 Contractor begins work.

### **6.0 ASSOCIATED DOCUMENTS:**

- 6.1 Contract Routing Sheet ([BUS-F007](#))



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### **7.0 RECORD RETENTION TABLE:**

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Original fully executed contract.	File cabinet or vault	Retain seven years or until expiration of guarantees. If no guarantees are involved, destroy seven years after completion of contract.	Destroy	Secured Building

### **8.0 REVISION HISTORY:**

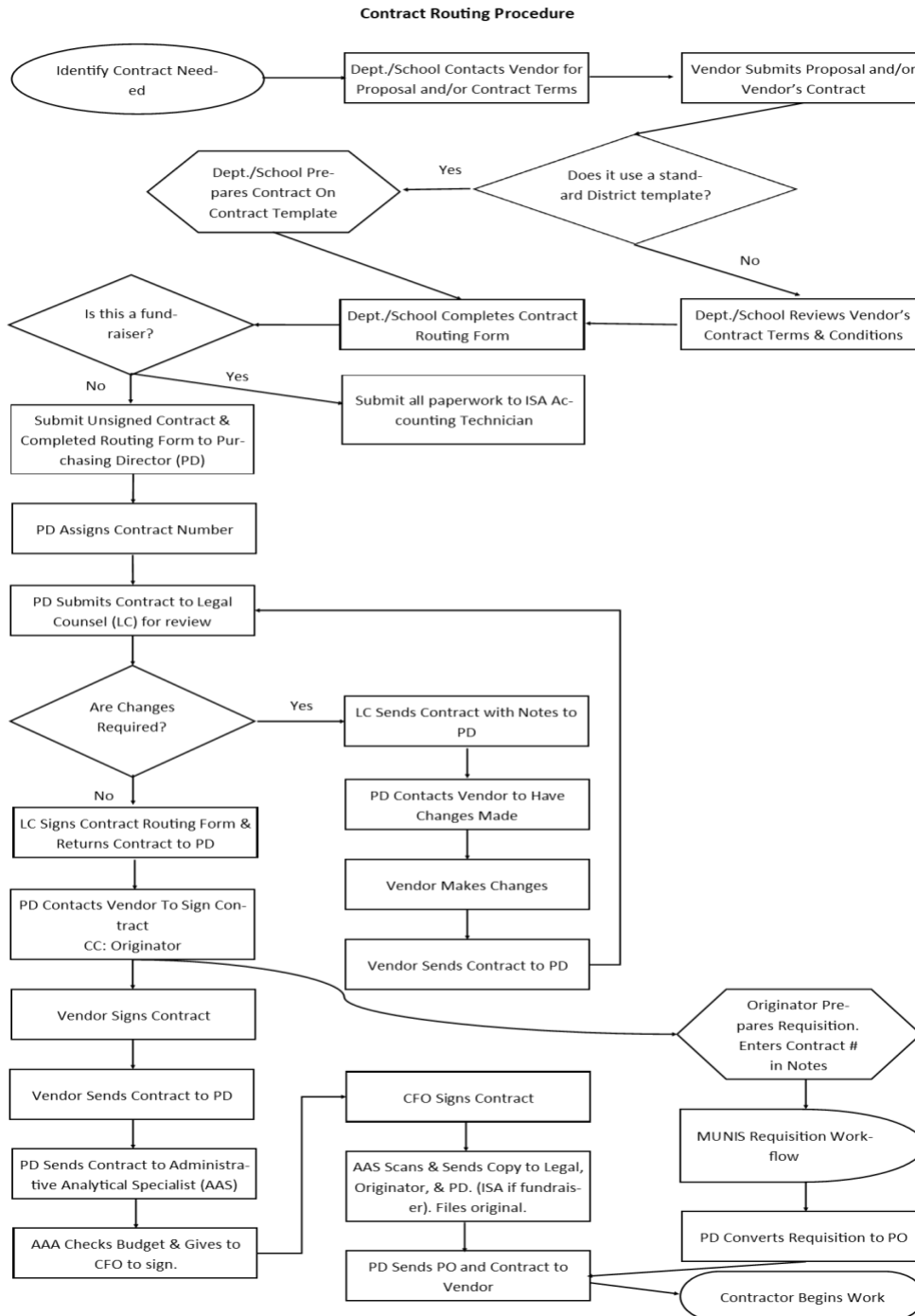
<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
7/27/2021		Initial Release

### **9.0 FLOWCHART:**

9.1 A flowchart detailing this process can be found below.

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\* \* \* End of Procedure \* \* \*