

Vendor _____
Division _____

B – NB Year: _____ Contract #: _____
Originator _____

Business Services Check List – For Services **\$500 and More**

(This form MUST accompany your paperwork throughout the process. Failure to do so may cause delays.)

Check one: ___ Guest Lecturer ___ Performer ___ Professional Services ___ Consultant* (Only the President, the VCBA, or the Board may authorize final approval for consultants.) **DO NOT USE THIS FORM FOR CATERED EVENTS.**

Step I: Prior to making contact with any vendors, provide a detailed proposal to Business Services as follows:

- ___ Purpose of contract, including originator's expectations from the vendor
- ___ Date(s) of service
- ___ Expected cost, including any travel, hotel, etc., expenses
- ___ Division and account number to be charged and ___ signature of appropriate budget manager
- ___ Signed & dated by originator
- ___ Signed by appropriate dean/director
- ___ Signed & dated by appropriate VP
- ___ ***Signed & dated by President (for consultants only)**
- ___ Countersigned & dated by Vice President of Business Services
- ___ Signed & dated by Director of Purchasing (if applicable)

Step II: Once proposal is approved, solicit bids (at least 3). Documentation required:

- ___ Information provided by the originator to prospective vendors
- ___ Responses from vendors
- ___ **Rating sheets for each vendor**

Step III: Prepare a letter of justification as follows:

- ___ Indicate why a particular vendor was chosen
- ___ Indicate why other vendors were **not** chosen
- ___ Signed & dated by originator
- ___ Signed & dated by appropriate dean/director
- ___ Signed and dated by appropriate VP
- ___ ***Signed and dated by President (for consultants only)**
- ___ Countersigned and dated by Vice President of Business Services

Step IV: Compile backup material.

- ___ Account Balance (ACBL) Screen
- ___ **One** of the following is required as backup for the selected vendor. For assistance, call Accounts Payable: 6156 or 6048.
 - ___ **A vendor screen for a selected individual or business vendor already set up in Colleague.**
 - ___ **A W-9 for a selected individual or business vendor not set up in Colleague.**

Step V: Prepare Professional Services Contract. Only 1 PSC per vendor is required. Original signatures only.

- ___ Signed and dated by vendor
- ___ Signed and dated by originator
- ___ Signed and dated by appropriate budget manager
- ___ Signed and dated by appropriate dean/director
- ___ Reviewed, signed, and dated by Employee Services (formerly HR) **ONLY** if it's an individual.
- ___ Signed and dated by appropriate VP
- ___ ***Signed and dated by President (consultants only)**
- ___ Countersigned and dated by Vice President of Business Services

Step VI: District or Vendor-prepared contracts (if required)

- ___ **Does the contract reflect Dallas County Community College District on Behalf of Richland College?**
- ___ Signed and dated by vendor ___ **If less than \$49,999, provide 2 original contracts with original signatures.**
- ___ Signed and dated by originator ___ **If \$50,000 or more, provide 3 original contracts with original signatures.**
- ___ Signed and dated by appropriate budget manager
- ___ Signed and dated by appropriate dean/director
- ___ Signed and dated by appropriate VP
- ___ ***Signed and dated by President (consultants only)**
- ___ Countersigned and dated by Vice President of Business Services

Step VII: Prior to the event, submit letter of justification, bid information & rating sheets, PSC &/or vendor contract, & all pertinent backup documents, along with original proposal, to Business Services for final approval.

➤ Requires Legal Approval? Y N Requires VCBA Approval? Y N Requires Board Approval? Y N

REMINDER: NO CONTRACT IS COMPLETE UNTIL ALL PAPERWORK IS PROPERLY PROCESSED AND SIGNED BY APPROPRIATE DISTRICT OFFICIALS.

For assistance, please contact the following on the back of page: _____➔

Vendor _____
Division _____

B – NB Year: _____ Contract #: _____
Originator _____

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Terry Lefler	214.890.3880
Tatiana Matyushina	972.238.6048
Sonia Ford	972.238.3788