



Form VII.1: Contract Review Checklist

DO NOT SUBMIT THIS FORM TO OGC. This is only here to help you.

As provided in the College's Contract Review Procedures, a contract's originating department and the Office of the General Counsel (OGC) use this contract checklist to ensure that College contracts comply with relevant laws and College policies and procedures.

Before submitting a contract for OGC review, or when considering use of an unmodified standard contract not required to be submitted for OGC review, the originating department is responsible for ensuring that a contract satisfies the criteria in this checklist. The checklist is for the originating department's records and does not need to be sent to OGC.

- 1. The contract ___ **requires** or ___ **does not require** (mark one) Board of Trustees approval. Board Policy Manual Section III.D.1.3. lists most types of contracts that require Board approval. If you have questions regarding the applicability of Board approval to your matter, please contact OGC. Note: The Board of Trustees delegates signature authority to the Chancellor or designee for contracts requiring Board approval.
- 2. If the contract does not require Board approval, identify the individual with delegated authority who will sign the contract on the College's behalf.

--

- 3. If applicable, the College has complied with all legally required competitive processes before selecting the other party to this contract. If you have questions regarding applicable competitive processes, please contact the College's Procurement department.
- 4. Is this contract a sole source purchase for \$50,000 or more? If so, has a sole source affidavit been executed?
- 5. Will grant funds awarded to the College be spent under this agreement? If so, has the College's Resource Development Administration team been involved up to this point? If not, please contact them before processing the contract any further.
- 6. The following information about the other party is accurate:

Legal Name	
Street Address	

- 7. The other party's identity (for an individual) or legal status (for an entity) has been verified.

- 8. If payments will be made, the College is the ___ **payor** or ___ **payee** (mark one) under this proposed contract.
- 9. The following information about the proposed transaction is accurate:

General

Sum to be paid	
Contract start date	
Contract end date	

Goods

Description of goods	
Delivery date	

Services

Description of services	
Service start date	
Service end date	

- 10. The originating department has reviewed all contract provisions and corresponding attachments and exhibits and has ensured that all information therein is accurate and that the intended business outcomes are likely to result.
- 11. The proposed contract clearly identifies the parties' rights and obligations, including any time frames for performing such obligations. **The originating department should work out any adjustments in a contract's business terms before submitting a contract for OGC review.**
- 12. The College can reasonably fulfill its obligations under the contract within the specified time frame.
- 13. The contract would provide value to the College and would ensure adequate return for any public funds to be spent and/or public property to be used during the contract.
- 14. The contract's term does not exceed a cumulative period of five years, including renewal terms. Contracts for the College to purchase goods and services may not exceed five years under Board policy.
- 15. The College employees working on this contract know of no illegality or unethical conduct associated with the contract.



Form VII.2: Delegation of Contract Authority

Deegee: _____
Name and Title

Signature

Delegator: _____
Name and Title

Signature

Date: _____

Subject: Delegation of Authority to Approve and Execute Contracts
Lone Star College Policy Manual—Authority to Purchase Goods and Services

Under the College's Policy Manual and Chancellor's Procedures, this memorandum confirms that the deegee named above has delegated authority from the delegator to approve and execute contracts that are less than \$_____ within the deegee's area of responsibility.

This delegation ___ **includes** or ___ **does not include** (mark one) authority to sub-delegate contract authority under established procedures.

This delegation supersedes and will govern any prior delegation of authority issued to the deegee. This delegation of authority will continue as long as you are an employee of the College unless amended or revoked at the sole discretion of the delegator or the delegator's supervisor(s) or by automatic revocation under relevant Chancellor's Procedures.

Further, this delegation and your approval and execution of contracts are subject to and limited by (i) existing and/or future Board of Trustee policies; (ii) existing and/or future Chancellor's Procedures; and (iii) review and approval of all proposed contracts as to legal form by the Office of the General Counsel.

cc: Mario K. Castillo, General Counsel