

Contractual Services Agreement (CSA) – Checklist (Do not send to the vendor!)

Prior to a vendor providing services to the District, a fully signed contract needs to be in place. All contracts need to be initiated by the Procurement team to ensure the District is compliant with state, federal & District guidelines, as well as protected from a liability standpoint. Sometimes vendors have their own contracts/agreements. Before signing them, please forward to the Procurement team for review. Please also remember that contractual services cannot be paid with your p-card.

In order to expedite the creation of new contracts, please fill out this checklist and include it when requesting a new contract. If they are a new vendor, a W-9 is required. If we have previously worked with the vendor (and they have a PEID in B+), then a W-9 is not required, but requesting one is still a good idea.

Contractor's Legal Name (as it appears on their W-9):

Address:

Telephone Number:

Email:

Social Security or Federal Tax ID Number:

Washington State Department of Revenue UBI number:

Where will the services be performed?

List specific dates & times, if applicable:

How many hours will the vendor be on District property?

What is the total contract value?

If applicable, what is the hourly rate?

Is the Contractor, or any principal of the organization, a retiree of one of the Washington State Retirement Systems? If yes, was it before age 65 using the Early Retirement Factors?

Please provide a detailed scope of work for the requested services:

If your school/department will not be paying for these services, please advise who the budget authority will be, so the contract can be properly routed to them for signature: