



Contract Routing Form

*** ROUTING FORM MUST STAY WITH THE CONTRACT THROUGH COMPLETION AND MUST BE SIGNED BY ALL REQUIRED PARTIES ***

EMPLOYEE ROUTING CONTRACT:			
CONTRACT TOPIC:			
CONTRACTOR:		PROJECT MANAGER:	
ESTIMATED COST/REVENUE:		INSURANCE CERTIFICATE? Yes <input type="checkbox"/> No <input type="checkbox"/>	
ESTIMATED START DATE:		ESTIMATED END DATE:	
BUDGET LINE ITEM: <small>See Department Director or Division Manager</small>			
OTHER BUDGET INFORMATION: <small>See Finance Department</small>			
<i>Contract Number:</i> _____			
<i>Department Code:</i> _____ <i>Account Number:</i> _____			
PROCUREMENT CLASSIFICATION: <small>See Purchasing Manager</small>			
<small>See Purchasing Policy for Definitions (Please check one)</small>			
Small Dollar Exempt (\$0-5,000) <input type="checkbox"/>	Cooperative Bid Exempt (List Organization in Comments) <input type="checkbox"/>	Sole Source Bid Exempt (Attach Justification Memo) <input type="checkbox"/>	
Simple Procurement (\$5,000-30,000) (Attach Quotations) <input type="checkbox"/>	Formal Procurement (\$30K-\$150K or \$300K for PW/CIP) (List IFB No. in Comments) <input type="checkbox"/>	High Value Procurement (Over \$150K or 300K for PW/CIP) <input type="checkbox"/>	
COMMENTS			
ROUTING ORDER			
Department:	Department Contact Signature:	Date Signature Requested:	Date Returned with Signature:
1) Department Director or Division Manager			
2) Finance Department			
3) Purchasing Manager			
4) City Attorney's Office (If Required)			
5) Contractor/Vendor			
6A) City Manager's Office			
6B) Council / Mayor (If Required)			
7) City Clerk's Office			

Distributed By:	Distributed To:	Name:	Date:
	Contractor		
	City Attorney's Office		
	City Clerk's Office		
	Finance Department		

Contract Routing Guidelines

The Project Manager is responsible for the contract from creation to execution. The contract and all documents incorporated by reference in the contract, including attachments, appendices, and exhibits must be attached to the contract. The Project Manager attaches the Contract Routing Form (above) to the contract. The following steps are guidelines for the Project Manager to follow:

- 1) **Department Director/Division Manager** – Project Manager must obtain approval from the Department Director or Division Manager responsible for completing the Budget Line Item section and the Insurance Certificate section.
- 2) **Finance Department** - Project Manager must obtain approval from the Finance Department employee responsible for completing the (1) contract number, (2) department code, and (3) account number in the Other Budget Information section.
- 3) **Purchasing Manager** - Project Manager must obtain approval from the Purchasing Manager to ensure the Procurement Classification section is completed in accordance with the Purchasing Policy.
- 4) **City Attorney's Office** - *If required*, the Project Manager should meet with the City Attorney's Office to draft a contract in accordance with the Purchasing Policy.
- 5) **Contractor** - The Project Manager must obtain the approval of the Contractor.
- 6) **Approval** - The "City Manager Approval Amount" is \$300,000 for public works or capital improvement projects, and \$150,000 for items not related to public works or capital improvement projects. Depending on the amount of the contract, the Project Manager must obtain the approval of the (A) City Manager or (B) the City Council.
 - A. City Manager Approval – If the contract is less than the City Manager Approval Amount the Project Manager must:
 - i. Create one (1) original contract for the Contractor and two (2) additional original contracts for City records.
 - ii. Obtain the signature of the Contractor for all three (3) original contracts.
 - iii. Obtain the signature of City Manager for all three (3) original contracts.
 - iv. Provide one (1) signed original contract to the Contractor.
 - v. Proceed to Step 7.
 - B. City Council Approval – If the contract is more than the City Manager Approval Amount the Project Manager must:
 - i. Obtain the approval of the City Manager for the contract amount.
 - ii. Schedule the contract as an item on the City Council Agenda through SIRE.
 - iii. Give the City Clerk's Office an electronic copy of the contract.
 - iv. Request the City Attorney's Office draft a Resolution.
 - v. Create one (1) original contract for the Contractor, and two (2) additional original contracts for City records.
 - vi. Obtain the signature of the Mayor for all three (3) original contracts upon approval by City Council. If requested, the City Clerk will assist if three (3) originals are provided prior to the City Council meeting.
 - vii. Obtain the signature of the Contractor for all three (3) original contracts.
 - viii. Proceed to Step 7.
- 7) **City Clerk's Office** - Project Manager must provide the remaining two original contracts and a Proof of Insurance Certificate to the City Clerk's Office for records management.