

## CONTRACT APPROVAL PROCEDURE

This procedure is intended to ensure that all agreements obligating the University are properly reviewed, approved, and signed prior to implementation. The procedures below outline the necessary steps in: (1) completing a Contract Approval Form (**CAF**); (2) obtaining the necessary approvals; and (3) obtaining the President's signature on behalf of the University.

### Policy

It is the policy of The Lincoln University that all purchases of goods or services, and any other commitments of the University's resources, must be documented by a written contract approved by the General Counsel and signed by the President.

### Procedure

#### 1. Obtaining a contract

The University prefers to use its standard form contracts, including the University's purchase order and standard terms and conditions. Purchase orders are available on Datatel. You should contact the Office of General Counsel for other form contracts. The University will, however, consider the service provider's contract. A completed and executed **CAF** must be submitted along with any proposed contract. The **CAF** may be obtained from the Office of General Counsel ([vreeves@lincoln.edu](mailto:vreeves@lincoln.edu)). A purchase requisition can substitute for the **CAF**. Therefore, if the contract is accompanied by a purchase requisition, there is no need to also complete and attach a **CAF**.

#### 2. Completing the CAF

##### Section 1: Information about the Vendor of Service Provider and the Contract

- 1-A Provide complete contact information so that new companies can be added to the vendor file. The vendor or service provider should be able to provide its federal tax ID number.
- 1-B Provide a brief description of the project.

- 1-C Provide information about the contract (e.g. what goods or services Lincoln will receive or provide to the other party).
- 1-D Please indicate whether the vendor is currently providing goods or services.
- 1-E If the contract is an unmodified Lincoln form or a renewal/modification of a previously approved contract, processing can be expedited.
- 1-F Please indicate the term of the contract or if the contract provides for automatic renewal.
- 1-G University contact information is required in case questions arise during processing of the contract.

**Section 2: Approvals**

- 2-A Obtain the signature of the applicable department chair or director (or authorized signatory).
- 2-B Obtain the signature of the applicable Vice President.
- 2-C Forward the **CAF** and contract to the Office of General Counsel for review and approval. The Office of General Counsel will in turn arrange to have the President execute the contract and return it to the University contact.



**CONTRACT APPROVAL FORM (CAF)**

If this contract requires a financial commitment, a purchase requisition with first line approval may be substituted for this CAF.

\*Contract Number \_\_\_\_\_  
(\*General Counsel use only)

**Section 1. INFORMATION ABOUT THE VENDOR OR SERVICE PROVIDER AND THE CONTRACT**

1-A Name of company \_\_\_\_\_  
Contact person \_\_\_\_\_  
Address \_\_\_\_\_  
Phone, fax, email \_\_\_\_\_  
Federal ID number \_\_\_\_\_

1-B Project name/description \_\_\_\_\_

1-C Describe Lincoln's interest in the goods/services: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

1-D Is vendor currently providing goods or services?  YES  NO

1-E Type of Agreement  
Check one:  New contract  Purchase order w/ quote (attach standard terms & conditions)  
 Renewal/Modification of previously approved contract  
 Unmodified Lincoln form contract

1-F The term of the contract is from (DATE) \_\_\_\_\_ to (DATE) \_\_\_\_\_

1-G Lincoln Contact Name/Extension: \_\_\_\_\_

**Section 2. APPROVAL**

2-A Department Chair/Director Approval: \_\_\_\_\_

2-B Dean Approval: \_\_\_\_\_

2-C Vice President Approval: \_\_\_\_\_

**Section 3. FOR COUNSEL'S USE ONLY**

3-A Additional Information Requested by Counsel?  YES  NO Date Requested \_\_\_\_\_

3-B Description of Additional Information Requested: \_\_\_\_\_  
\_\_\_\_\_

3-C Counsel Approval \_\_\_\_\_ Date \_\_\_\_\_