

General Purchasing Contract or Lease Approval Routing Form

Overview: University contracts for the purchase of equipment, equipment leases, real estate leases, goods and services are subject to normal administrative reviews and approvals prior to signatory commitment. Departments are strongly encouraged to use this form to document the reviews and approvals by appropriate University officials before contracts are submitted to General Officers or their delegates for signature. See page 4 for instructions regarding the use of this form. The Delegation of Authority subdelegation matrix is located at: https://www4.vanderbilt.edu/vc_finance/delegations/

Contract, Lease or Project Name **Date**

Requesting Department

Department Requester
 Contact Name Phone email

Supplier/Lessor

Contract/Lease Annual Amount \$ Contract/Lease Total Amount \$

Contract Term (Years) Start Date End Date No End Date

Contract Scope Dept/Division only Provost Institution-wide

Funding Sources

Unrestricted Restricted Endowment Debt Plant
 Budgeted Grants / Contracts Gifts

Supporting Documentation

Business Case / Proposal Specifications
 Contract / Lease Financial Analysis

Executive Summary (Additional comments may be attached as separate documents)

Contract, Lease or Project Name

Date

Review /
Routing
Sequence

University Approval Signature List - enter the routing sequence for each required reviewer in the check box

Date: Approved Disapproved

Dean, Department Chair or Director

Subdelegate
Name _____

Date: Approved Disapproved

Director Purchasing & Strategic Sourcing

Subdelegate
Name _____

Date: Approved Disapproved

General Officer

Subdelegate
Name _____

Date: Approved Disapproved

Vice Chancellor for Administration

Subdelegate
Name _____

Date: Approved Disapproved

Vice Chancellor for Finance & CFO

Subdelegate
Name _____

Date: Approved Disapproved

Chancellor

Subdelegate
Name _____

Date: Reviewed Not Reviewed

Office of the General Counsel

Date: Approved Disapproved

Other/Title

Date: Approved Disapproved

Other/Title

When to use this Form

This Contract or Lease Approval Routing Form is to be used for routing contracts for appropriate review and approval prior to the procurement of equipment, equipment leases, equipment evaluation contracts, goods and services (e.g., maintenance, consultants, contractors, professional trades, speakers), real estate leases and all associated confidentiality agreements.

Departments are strongly encouraged to use this form for any general procurement contract or lease that requires external review or approval. Completed forms will be archived along with the associated contract.

How to use this Form

This form is an interactive PDF file that allows you to fill in your information online and maintain an electronic file for your records. Forms may also be printed and filled out manually.

The Contract, Lease or Project Name field automatically duplicates on each page. The Date field displays today's date on each page. Field navigation is done with the tab key or mouse.

The Executive Summary text field is to be completed by the requesting department. Your summary should include a brief description of the subject, what commercial / technical / legal issues need to be addressed or approved prior to signature, and your recommendations. Please include your name and instructions for the signer about how and where to return the executed documents for further processing. If you need more space please attach a separate document. Each reviewer may attach their own comments as separate documents.

Signatures: Completed forms are to be printed and signed in the appropriate signature field. If a specific delegate is not listed, use the "Other/Title" signature line and type or write in the appropriate title. Authorized subdelegates are to use the appropriate officer's signature block and type or print their name in the adjacent Subdelegate Name field.

Routing the Form

The originating department should use the Review/Routing Sequence box next to each signature block to indicate each person required to review or approve the contract and designate the routing sequence (1,2,3, etc.). The originating department is responsible for physically routing this form and all associated documentation to the first reviewer. Each reviewer should then subsequently route the form and attachments to the next applicable department, general officer or authorized sub-delegate for their review and signature according to the Delegation of Authority Policy and subdelegation matrix. A list of routing addresses for officers and specific sub-delegates is included on page 5.

While it is not required that all contracts be routed to Purchasing prior to submission to the general officer or authorized subdelegate, it is recommended contracts for the purchase of goods, services and capital equipment be reviewed by Purchasing as appropriate prior to signature.

Real estate leases are to be routed to VU Real Estate Operations for their review and approval.

Electronic Routing: Documents may be scanned and sent electronically **only** with the prior permission of the applicable general officer or authorized subdelegate. Signatures are still required on e-mailed forms. Individually signed and routed forms will collectively be considered valid approvals.

Signed Contracts: Signed contracts including this form and all associated documents, are to be returned to the originating department, or Purchasing as appropriate for further processing.

Contracts requiring Purchase Orders: Completed forms and all associated contract documentation are to be attached to purchase order requisitions submitted to Purchasing for processing. For contracts that have not been reviewed or signed by the applicable general officer or subdelegate, Purchasing will initiate the contract review and routing process.

Questions or Suggestions?

Questions about the use of this form or suggested improvements may be directed as follows:

Purchasing & Strategic Sourcing 875-3776 purchasequestion@vanderbilt.edu or <http://www.vanderbilt.edu/procurement/>

**General Purchasing Contract or Lease Approval Routing Form
Routing Addresses**

University Departments

Director Purchasing & Strategic Sourcing	Chuck Nicholas 1110 Baker Building (PMB 407000)
Director Real Estate Operations	Ally Sullivan 1110 Baker Building (PMB 407767)
Vice Chancellor for Administration	Eric Kopstain 421 Kirkland Hall (PMB 407771)
Vice Chancellor for Finance & CFO	Brett Sweet 321 Kirkland Hall
Chancellor	Nicholas S. Zeppos 211 Kirkland Hall
Office of the General Counsel	2100 West End Ave Suite 750