



MEMO

TO All Vice Presidents, Deans, Directors, Budget Officers
FROM Mike Mallery, VP for Finance & Administration
DATE JANUARY 13, 2014
RE Campus Signature Authority

The campus signature authority process for contracts and agreements has been updated. If anything is ordered by, contracted to or legally binding on the University that has any budget impact, the following steps must be taken:

- **SIGNATURES:** Contracts/Agreements must be signed by the area's Budget Officer (the person responsible for budgeting and designated by each areas' Dean, Director or Vice President) and/or the Budget Area Officers (budget area VP's, Deans and Directors) in advance of forwarding for legal and insurance review, and processing for payment.
- **LEGAL:** The Director, Office of Legal Affairs, must review and approve all contracts (except the standard Pacific University Letter of Agreement ones for less than \$5,000) unless a previous arrangement has been made with the Budget Area Officer for boilerplate contracts/agreements (defined as form contracts, such as student affiliation agreements generated by the University, that have been approved, in advance by the Director, Office of Legal Affairs and the VP for Finance & Administration, and do not involve the addition or deletion of contract provisions would fit into this category). Boilerplate contracts/agreements should be reviewed annually with the Director, Office of Legal Affairs for updating language and FERPA best practices. All other contracts submitted will be initialed by the Director, Office of Legal Affairs and forwarded as indicated below.
- **INSURANCE:** The Director, Office of Legal Affairs will determine if a certificate of insurance is needed. Because certificates of insurance requests must be made at least a week in advance for a timely response from the University's insurance agent and underwriter, we ask that you send contracts/agreements to the Director, Office of Legal Affairs two weeks in advance of your request. Requests for certificates of insurance shall be forwarded to the Executive Assistant to the VP for Finance & Administration for processing. All certificates will be sent directly to the vendor or outside entity. If no insurance certificate is required, contract/agreement will be

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forwarded directly to the VP for Finance & Administration's office or returned to the Budget Officer, dependent upon the monetary amount.

- **FURNITURE, EQUIPMENT & TECHNOLOGY:** Any orders placed that require encumbrances to budget, including furniture and technology orders, will require the VP for Finance & Administration signature if the total is over and above \$25,000. For amounts less than \$25,000, the area's Budget Officer or Budget Area Officer has signature authority. The ordering procedures that apply to furniture and technology orders will remain in effect.
- **FINAL SIGNATURE AUTHORITY:** A budget impact of less than \$25,000 can be signed by the Budget Officer or Budget Area Officer and then forwarded directly to the Director, Office of Legal Affairs. Any budget impact over \$25,000 will be signed by the VP for Finance & Administration or his/her designee. All signatures, including an initialing by the signature line on the contract/agreement by the Director, Office of Legal Affairs, must be in place before obtaining the VP for Finance & Administration's signature.

At all times, you are asked to review budget constraints within your areas before requesting funds for payment. Contracts attached to a purchase order, letters of agreement, etc. will be archived in the Business Office to be treated as an audit trail. Once fully executed, all contracts/agreements, regardless of cost, should be forwarded by the initiating officer to the Director, Office of Legal Affairs for safekeeping and future liability issues.

A flowchart is attached for your convenience and reference. This memo supersedes any signature authority correspondence in print and is effective immediately. The website will be updated to reflect this change.

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