



**CHECKLIST FOR CAO CONTRACT REVIEW** [may be copied and sent via email]

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**Date:**

**To:** City Attorney's Office

**From:**

**Subject:** Ready for Review and Stamp – \_\_\_\_\_ for \_\_\_\_\_

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**Directions:** Provide the information required in the **highlighted areas** in an email to CAO (**send your email to CAO at [springfieldcao@springfield-or.gov](mailto:springfieldcao@springfield-or.gov)**). **Include this checklist, the complete contract with all attachments compiled as one PDF, and any background information listed in the checklist.** The contract will be reviewed, stamped and returned to the staff person named above. Contact Finance if you have questions about what documents need to be compiled in the final version of the contract.

**Contract Summary:** Check the appropriate category indicating whether the contract is new, or an amendment to a prior/existing contract, and provide the relevant information indicated below.

**Contract Number:** \_\_\_\_\_

New Contract/Agreement

**Brief summary of the goods or services to be provided:**

**Vendor/Contractor:**

**Dollar Value:**

**Term:**

Amendment to an Existing Contract/Agreement:

**Brief summary of the purpose of the amendment and the changes proposed:**

**Vendor/Contractor:**

**Amendment Number:**

**Original Contract Dollar Value and amended contract dollar value (if different):**

**Original Term and amended term (if different):**

**CAO Contract Review Categories:** Check the appropriate category and provide the required information for that contract type. If your contract uses a standard CAO-approved form of contract or purchase order, it does NOT need CAO review; refer back to Procurement Checklist or contact Finance for next steps/questions.

**New Contracts:** The PDF for stamping must include all attachments and exhibits referenced in the contract. If the contract was procured using an RFP or ITB, include a link to the solicitation documents in the email to CAO.

- Changes to Standard Template:** Substantive changes to CAO-approved template (e.g. changes to city's standard terms and conditions *other than* filling in blanks or selecting applicable check-boxes).
- Cybersecurity Risks:** Contracts of any dollar value for services that involve allowing vendor access to City IT systems or other CJIS-protected facilities.
- Vendor Paper:** Contracts using a vendor-supplied or vendor-drafted form of agreement.
- Cooperative Procurement:** Permissive cooperative procurements that do not use the Cooperative Procurement PO or work order form provided in the cooperative master agreement, and any Joint Cooperative Procurement.
- Direct Award:** Contracts with Sole Source Justifications of any value, and Direct Appointment of Professional Services above \$250,000. The email to CAO must include the underlying sole source justification or direct appointment form for CAO signature.
- Special Procurement:** Contracts that are Special Procurements under ORS 279B.085. The email to CAO must include the underlying Council resolution approving the special procurement.
- IGAs:** Intergovernmental Agreements (IGAs) and Memorandum of Understanding (MOU).
- Grant Funded Agreement:** Contracts, agreements, IGAs, and MOUs involving grant funds received by the city. Attach a PDF of the executed grant agreement to the email.
- Other [Please Explain]:**

**Contract Amendments:** The email to CAO must include the original contract as executed and all prior amendments. The PDF for stamping must include all attachments and exhibits referenced in the *current amendment*; attachments or exhibits that are referenced in the original contract or prior amendments, that are not changing, do not need to be attached to the current amendment.

- Changes to Standard Template:** Amendments that include substantive changes to CAO-approved template (e.g. changes to city's standard terms and conditions *other than* filling in blanks or selecting applicable check-boxes).
- Cybersecurity Risks:** Amendments involving vendor access to City IT systems or other CJIS-protected facilities, or changing the scope of existing access.
- Vendor Paper:** Amendments to a vendor-supplied or vendor-drafted form of agreement.

- Cooperative Procurement:** Amendments to permissive cooperative procurements that do not use the Cooperative Procurement PO or work order form provided in the cooperative master agreement, and any amendment to a Joint Cooperative Procurement.
- Direct Award:** Amendments to contracts with Sole Source Justifications of any value and amendments to Direct Appointments of Professional Services above \$250,000. The email to CAO must include the original sole source justification or direct appointment form.
- Special Procurement:** Amendments to contracts that are Special Procurements under ORS 279B.085. The email to CAO must include the underlying Council resolution approving the special procurement.
- IGAs:** Amendments to IGAs and MOUs.
- Grant Funded Agreement:** Amendments to contracts, agreements, IGAs, and MOUs involving grant funds received by the city. Attach a PDF of the executed grant agreement to the email.