



APPROVAL REQUEST FOR A BEYOND 5 YEAR CONTRACT TERM

Date of Submission:

For Professional Services submit document via SAP Requisition. Refer to the [Contact and Commodity Assignment List](#) for buyer code guidance.

For Goods & Related Services refer to [Contact and Commodity Assignment List](#) for buyer code guidance.

SECTION I

Service Agreement Number:

Contractor/Consultant:

Current Contract Start Date:

Current Contract End Date:

Total Current Value of the Service Agreement:

Budget Unit #:

Description of Service:

User Agency/Department(s):

Requesting Agency/Department Contract Manager/Coordinator

Name:

Phone:

Email:

SECTION II

Recommended # of Months Extension:

Recommended End Date:

Recommended Additional Amount:

Recommended Total Value of the Service Agreement:

SECTION III

Mark appropriate box for Contract's Signature Authority

Board of Supervisors

Delegated to Department Head or designee

Director of Procurement



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SECTION IV

Pursuant to Board Policy 5.4.5.4, **EXCEPTIONS** to the maximum 5-year term limit for Professional Services are listed below. Select the appropriate exception(s).

- | |
|---|
| (1) When the funding source for a contract provides that the contract term must exceed five years. Such funding sources may include the State or Federal government or an outside funding source (private or foundation grant). |
| (2) When the County “piggybacks” on another jurisdiction’s contract that is more than five years or that is subsequently extended for more than the initial five-year term. |
| (3) When a specific law, code or regulation requires that a particular type of contract include certain contract terms(s) that exceed 5 years. Please provide a specific citation below. |
| (4) Contracts for goods, which includes equipment, that have a lifespan that exceeds five years and the benefits to the County of exceeding a five-year term outweigh the benefits of creating and executing a new contract after five years |
| (5) Contracts for technology software or hardware that have a lifespan exceeding five years and the benefits to the County of exceeding a five-year term outweigh the benefits of creating and executing a new contract after five years |
| (6) Proprietary maintenance contracts. |
| (7) Contracts for project-specific professional services where the length of the project is expected to exceed five years. |
| (8) Revenue contracts. |
| (9) Contracts with other governmental entities. |
| (10) When an Agency/Department is otherwise able to justify that it is in the County’s best interest to exceed the maximum 5-year term requirement. For example, an Agency/Department is able to demonstrate that the financial and/or programmatic impact on the County would be significant if the contract term does not exceed the maximum 5-year term requirement [Specific rationale must be provided in Section V, below]. |

SECTION IV continued

Provide BRIEF but CONCISE details to validate the EXCEPTION(S) selected above



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SECTION V

If relying upon Exception (10), the OCCM or the Director of Procurement, as applicable, has discretion to approve a contract term for more than five years. Provide a narrative explanation below:

A. BACKGROUND (Describe the good or service procured)

B. CONTRACT HISTORY, if applicable. (How was the contract awarded? What were the events that occurred prior to the end of the contract term?)



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C. REASONS FOR CONTRACT TERM EXTENSION

D. RECOMMENDATION PLAN TO CURE ISSUE(S) (If applicable)

SECTION VI

Requesting Agency/Department Contracts Manager:

Print Name:

Signature:

Phone:

Email:

Requesting Agency/Department Director:

Print Name:

Signature:



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SECTION VII

Decision and Required Steps Following Decision (to be completed by OCCM or Procurement)

Approved	Attach to Legislative File
	Attach to Delegation of Authority Coversheet
	Attach to Service Agreement Checklist
Approved with Conditions	Comments:
Returned for Possible Reconsideration	Comments:
Denied	Comments:

SECTION VIII

Office of Countywide Contracting Management/Procurement Department Signature

Date