



## External Signature Workflow



# Signatory Authority Workflow- External

**Step 1:** Document is identified as needing a signature.

**Step 2:** Email [BOsupport@ideapublicschools.org](mailto:BOsupport@ideapublicschools.org)

**Step 3:** Document proceeds through contract process. Contracts Manager identifies (based on legal guidance provided) which teams need to review (ie. Risk Management, Legal Affairs, Procurement).

**Step 4:** When contract/written agreement is approved for signature, a DocuSign will go to the authorized signer ([Link](#)). DocuSign request will include CRF, Zendesk history, Signature Cover Sheet, and contract/agreement. **You will not directly communicate with signer.**

**Step 5:** IDEA staff will obtain signatures for all parties (both internal and external) through DocuSign.

**Step 6:** IDEA staff will return fully executed document to the end user who made initial request in Step 2.

Region	Items explicitly requiring board approval*	Items not explicitly needing board approval
<b>Southern Louisiana (IPSL)</b>	Board President, secretary and/or treasurer	<ol style="list-style-type: none"> <li>Executive Director</li> <li>Last resort: Supt/CEO</li> </ol>
<b>Greater Cincinnati</b>	Board secretary and/or board chair	<ol style="list-style-type: none"> <li>RDO</li> <li>Back Up: Executive Director</li> <li>Last resort: Supt/CEO – IDEA employee</li> </ol>
<b>Florida</b>	Board secretary and/or board chair	<ol style="list-style-type: none"> <li>Executive Directors</li> <li>Back-up: Supt/CEO</li> </ol>
<b>IDEA/IPS</b>	<ol style="list-style-type: none"> <li>CFO or Superintendent/CEO</li> <li>Other individual should authority be formally delegated</li> <li>Board Chair or Board Secretary</li> </ol>	<ol style="list-style-type: none"> <li>CFO or Superintendent/CEO</li> <li>Other individual should authority be formally delegated</li> <li>Board Chair or Board Secretary</li> </ol>