FILL IN ON THE FIRST CALL

Your shared timeline.

Seven dates, who owns each one, and nine things to settle before anything is signed. Type into this PDF and send it back, or fill it in with us during the fifteen-minute walkthrough.

DISTRICT OR SCHOOL		PREPARED ON		PREPARED BY	

Your dates

IF THE BOARD DATE MOVES, EVERY DATE AFTER IT MOVES WITH IT

01	**Walkthrough with your team and finance** WEEK 0	DATE	WHO ATTENDS	
02	**Business office and solicitor review complete by** WEEKS 1–2	DATE	REVIEWER	
03	**Board meeting** THE APPROVAL	DATE	AGENDA OWNER	
04	**Agency list shared with Fullbench™** WEEKS 1–2	DATE	AGENCIES NAMED	
05	**Agencies onboarded by** WEEK 1 AFTER APPROVAL	DATE	PROGRAM CONTACT	
06	**First opening released** WEEK 2 AFTER APPROVAL	DATE	ROLE, BUILDING	
07	**First consolidated invoice** MONTH 2	DATE	BUSINESS OFFICE	

Before you sign

TICK EACH ONE AS IT IS SETTLED

- ☐ **Scope.** One whole program area, or everything your agencies supply.
- ☐ **Covered roles.** The roles the program is exclusive for, listed in Exhibit A.
- ☐ **The agency list.** Every agency you use for that scope, and a green light to contact them.
- ☐ **Required documents by role.** What Fullbench reviews and approves before anyone starts.
- ☐ **Rate range by role.** Built from current agency rates; approved by your office.
- ☐ **Funding codes and invoice structure.** Codes per position; subtotals, or split by fund.
- ☐ **Your contacts.** Who chooses the candidate, approves the hours and reads the invoice.
- ☐ **The approval path.** Direct board approval, cooperative purchasing, or a voluntary RFP.
- ☐ **The solicitor's question list.** Sent to us before the board meeting; answered in writing the same day.