

## CONTRACT ADMINISTRATOR/LEGAL DRAFTING REQUIREMENTS CHECKLIST

**Objective:** Produce initial drafts in timely manner while utilizing resources efficiently

Depending upon complexity of document and resource availability, initial drafts of legal documents may be initially generated from the Contract Administrator, Legal Assistant or Attorney (for purposes of table below, Legal Assistant and Attorney are collectively "Legal Requirement for drafting"). Whenever possible, determination of who will provide initial draft will be made in Legal Priorities meeting.

Step #; Step Description <b>[All Steps 2-13, "if applicable"]</b>	CA Requirement for initial drafting	Legal Requirement for drafting/review
[1] Sr. Manager advised and matter placed on Legal Priorities list; drafter identified in bi-weekly Legal Priorities meeting	★ [*see exception if not placed on Legal P. list]	★
[2] BATS generated and time for receipt of comments has expired <i>[Note: Depending on nature of unresolved comments, this step may delay drafting process; .Sr. Manager approval required if not doing a BATS and one is required]</i>	★	★
[3] All BATS comments received & resolved <i>[in consultation with Attorney, if appropriate]</i> .	★ [preferred over Step 2]	★
[4] If new Tenant, entity name verified with Tenant. <sup>^</sup>	★	★
[5] Provide leased space detail; begin steps for finalizing lease plat/drawings <i>[finalized is preferred]</i> . <sup>^</sup>	★	★
[6] Maintenance issues identified and communicated to drafter; Maintenance Matrix started <i>[finalized is preferred]</i> .	★	★
[7] Provide copy of <u>unsigned</u> Executive Summary <i>[Note: If terms of Exec. Summary change, this step may delay drafting process]</i> .	★	
[8] Provide copy of <u>signed</u> Executive Summary	★ [preferred over Step 7]	★
[9] Provide copy of <u>unsigned</u> Proposal letter, or detailed email of terms.**	★	
[10] Provide copy of <u>signed</u> Proposal Letter <i>[Note: If complex matter, Legal desires to review PL before it is sent out]</i> .	★ [preferred over Step 10]	★
[11] Environmental audits <i>[Phase I, walkthroughs, Phase II, special audits]</i> scheduled, and drafter given "heads up" of any possible issues.	★	★
[12] In addition to PM review, applicable environmental audits reviewed by Aviation Environmental; and copies provided to drafter with Environmental's recommendations/comments.	★ [preferred over Step 11]	★
[13] Any "non-standard" exhibits done, or specific requirements articulated <i>[i.e., scope of work timeline for reimbursement agreements, etc.]</i> <i>[exception: these exhibits may not be identified as required until after drafting request made]</i>	★	★

### **\*Emergency Requests between Legal Priorities Meetings**

If noncomplex drafting request, and not possible to place on Legal Priorities within window of time initial draft is needed, advise Sr. Manager, and upon approval, request for initial draft should go to Diane for CA to begin drafting until it can be placed on Legal Priorities for Legal review. *[See list of basic information needed below]*

### **\*\*Basic Information Needed for CA to Begin Drafting if Proposal Letter Not Provided**

If unable to provide unsigned or signed Proposal Letter at time initial drafting request is made to CA, conduct Steps 1-7, as applicable, and then send an email to Diane (cc Sr. Manager) with following minimum terms outlined, as pertinent, including, but not limited to:

- (i) type of document requested (i.e., Amendment, Consent, Lease, etc.);
- (ii) if new Tenant, provide entity name;
- (iii) pertinent background information (i.e., whether there is a prior lease, etc.);
- (iv) term of Lease;
- (v) rental rate and adjustments;
- (vi) lease area;
- (vii) insurance limits;
- (viii) security deposit;
- (ix) environmental information (i.e., will a Phase I or walkthrough be performed?); and
- (x) any special conditions (i.e., Tenant has a 90 day out).

### **<sup>^</sup> Other Information needed to Finalize Legal Document; Contract Administrator and Legal Assistant Help**

In order to finalize a legal document, the entity name needs to be confirmed as well as whether the business is authorized to do business in Oregon. In addition, it's desirable to have identified the authorized signatory(s). Do not hesitate to request CA or Legal Assistant assistance in confirming entity name, and checking Oregon business registry. The Lease Plat Process provides that CA's take a lead role in finalizing lease plats.