

GCISD Contract Submission Process

For non-Federal Funds Contracts

Federal Funds Contracts should be sent to Paula Shafer for processing
see page 2 for the Federal Funds Contract Submission Process

These instructions were emailed by Leslie Krawetzke on September 23, 2020. There are no changes being made. This document is intended as a helpful reference guide for the contract submission process and designed to be used as a partner with Leslie's email. Additional information and current year approval forms can be found on the Operational Services webpage under Contract Process.

All **non-Federal Funds Contracts** should be submitted by **email** to Donna Brennan in the Purchasing department, do not cc Leslie on this email. Copying Leslie on this email causes confusion when Purchasing forwards the contract to her for Operational Services review.

Do not send paper or forward online versions of contracts. Contracts for review should be in a Word format and emailed to Donna along with any documents needed for review. Documents cannot be edited if scanned in a PDF format. All documents should be sent in **one email** but as **separate attached files** and follow the **naming conventions** outlined on page 3.

Donna will return a contract back to you if the forms are not separated, named correctly or there are missing/incomplete forms. She will not "hold" contracts waiting for additional documents. This creates a lot of confusion and something could be missed when forwarding the contract to the next level for review. You will receive a copy of the email when Donna forwards your contract to Operational Services for review.

Please add the contract to the **Contract Status Sheet** on our google drive, before sending your email to Donna.

If you need to replace a document or add additional ones after you send it to Donna, check the Contract Status Sheet to determine where to send the document.

- If Operations has already logged it in (column L), please send the additional/replacement document(s) directly to Leslie; do not cc Donna on this email.
- If it has not been logged in by Operations and you have not received an email, **all** documents, including the additional/replacement one(s), should be emailed to Donna with a note that this is a replacement submission for an earlier one. **Please do not send the additional/replacement document(s) by themselves.**

Federal Funds Contract Review Process

Campus/Department should prepare and submit the following documents to Paula Shafer through the Title Crate. If you need assistance with using the Title Crate, please contact Paula S. All Federal Funds Contracts must be submitted through the Title Crate. Please do not send through email or these will be returned to you.

Please upload files to the Crate using the naming conventions on page 3 of this document. The only documents that can be combined in a single file are the **Federal Programs Budget Request Form, DIP/CIP, and EDGAR Quote Form and quotes**. Contracts for review should be in a Word format. Documents cannot be edited if scanned in a PDF format.

DO NOT send a copy to Donna Brennan. If using Federal Funds, it must be approved by Shannon Tovar before moving forward in the contract approval process. Once the Federal Funds Contract has been approved by Shannon to move forward through the District Contract Approval Process, Paula S. will email documents to Donna Brennan.

Please add the contract to the **Contract Status Sheet** on our google drive, before adding your contract to the Title Crate.

If any of these documents are missing, it will cause a delay in the review of your contract.

Please note that a Federal Funds Contract Purchase is a two-step approval process. First Shannon approves the contract to move forward through the District Contract Approval Process. Once the contract has been approved, it comes back to Shannon for the Federal PO approval. Paula S. will enter a requisition after Shannon has approved the Federal PO.

Do not hesitate to let Donna, Leslie or Paula S. know if you have any questions.
Thank you for your help with this process.

Donna.brennan@gcisd.net

Leslie.krawetzke@gcisd.net

Paula.shafer@gcisd.net

Naming Contract Documents for Review

All contract documents should be named using the following naming conventions. Please do not attach scanned documents using the auto assigned name, ex. 20210312153024265. We cannot tell which attachment is which with these names. These naming conventions apply to both Local and Federal Funded contracts.

Form	Naming Convention
Contract Approval Form – use current year (see below on how to complete this form)	“Vendor Name” Contract Approval Form (ex. Jostens Contract Approval Form)
Quote – 1 required if cost is over \$3,000 3 required if cost is over \$10,000 (quote should reference awarded bid number being used for the purchase – ex. BuyBoard #963-15, TIPS 1801501)	“Vendor Name” Quote (ex. Jostens Quote)
Terms and Conditions – Word Format	“Vendor Name” Terms and Conditions (ex. Jostens Terms and Conditions)
Privacy Policy – Word Format	“Vendor Name” Privacy Policy (ex. Jostens Privacy Policy)
Data Sharing Form – if needed*	“Vendor Name” Data Sharing Form (ex. Jostens Data Sharing Form)
Vendor Software Review Form – if needed*	“Vendor Name” Vendor Software Review Form (ex. Jostens Vendor Software Review Form)
Software Purchase Review Form – if needed*	“Vendor Name” Software Purchase Review Form (ex. Jostens Software Purchase Review Form)
Misc. Documents – if needed* (each document <u>type</u> must be a separate attachment)	“Vendor Name” “Name of Document” (ex. Jostens Schedule A)
*These forms are not needed on every contract. Before sending the contract, you may contact Leslie (Data Sharing Form) or Donna (Software Forms) to see if you need to include these.	

Additional Forms Required for Federal Funds Contracts

Form	Naming Convention
<p>Upload to Title Crate as one document</p> <ul style="list-style-type: none"> *Federal Programs Budget Request Form *DIP/CIP – depending on if district or campus *EDGAR Quote Form *Quotes - 3 required for all Federal Funds purchases no matter the cost 	Documentation for “Vendor Name” (ex. Documentation for Pearson)

Completing the Contract Approval Form

- Use the [current year](#) Contract Approval Form.
The most current form can be found on the Operational Services webpage under “Contract Process”. If you save a copy on your computer, be sure to update it at the beginning of each school year. Contracts submitted with incorrect cover sheets will be returned.
- In the [Title field](#), please enter the proper name for the agreement including the company name. Example Scholastic Book Fair (not Campus Book Fair), Learning A-Z (not license agreement), Georgia Pacific Copy Paper (not paper)
- In the [Duration Period field](#), please enter the new term dates. The term for all Federal Funds contracts should coincide with the federal grant year, which is July 1st to June 30th. Please do not extend Federal Funds contracts beyond June 30th. It is allowable to have a short term contract as long as it does not extend beyond June 30th.
- **If using Federal Funds, select box 1.**
- Select one of boxes [7, 8 or 9](#), the cost of the contract.
- The [blank box under item 10](#), may be used to provide fund type (Local, Student) for this purchase, the expiration date of the vendor’s quote or any other pertinent information.
- Select any of the applicable [Student boxes](#) located above the signature section.
- Request signature(s) of [Campus/Department](#) staff in the corresponding fields.

Completing the EDGAR Quote Form for Federal Funds Contracts ONLY

- Date
- Submitted By
- Vendor 1,2, & 3’s information, quoted unit prices and totals
- Comments if needed
- **Vendor Selection and Justifications**
It is very important to be sure you provide enough information so that if it is reviewed by the Auditors they will understand why the awarded vendor was chosen. Your justification should explain why one vendor was chosen over another – not just information about your chosen vendor or product, but what was the difference between the vendors? (ex. Pearson is the chosen vendor because their product provides remediation and enrichment. The other vendors have only remediation or grade level instruction.)