EXECUTION OF CONTRACT FOR OUTSIDE PROFESSIONAL SERVICES PROCEDURE (BUS-P002)

Clarksville-Montgomery County School System

1.0 SCOPE:

1.1 This procedure outlines the process of executing a contract for outside professional services.

2.0 RESPONSIBILITY:

2.1 Program Coordinator

2.2 Principals

3.0 APPROVAL AUTHORITY:

3.1 Chief Financial Officer (CFO)

4.0 DEFINITIONS:

4.1 Board Account: Funds approved by the Board of Education and appropriated by the County Commission

4.2 ISA: Individual School Account

4.3 Program Coordinator: Employee responsible for implementing a Federal Project or controlling expenditures for a particular instructional or operational component of the budget.

4.4 Program Supervisor: Employee exercising supervisory control over a program.

5.0 PROCEDURE:

5.1 Need for an outside professional service is established.

5.2 Appropriate school system program coordinator draws up contract utilizing the standard template (BUS-F006). **Contracts must be typed on letter size paper.**

5.2.1 All contracts which do not utilize the standard CMCSS template (BUS-F006) are routed to the Human Resources Legal Counsel office for review prior to processing.

At any point in the contract preparation process a question arises affecting the execution of the contract, or there is a question regarding language, budget information, accounting procedures or anything else affecting the contract, please contact Business Affairs for assistance. The point of contact is the Chief Financial Officer at 920-7850.

5.3 If the performance of this Contract requires the Contractor and/or an employee of the Contractor to have direct contact with the school children or have access to the grounds of a school or child care center when children are present, the Contractor must complete the attestation form (BUS-F020) and attach it to the contract.

5.4   If contract is funded by a Board Account:

   5.4.1   Proposed contract is sent via email to the Program Supervisor for approval.

      5.4.1.1   If contract is not approved, it is returned via email with changes and for rewrite.

   5.4.2   Contract is sent to vendor via mail or email to obtain signatures.

      5.4.2.1   Vendor signs original and mails the contract or e-mails a signed copy to the Program Supervisor.

      5.4.2.2   New vendor must complete a W-9 before Purchase Order is processed.

   5.4.3   Contract is routed to the Business Affairs office for review regarding budget availability and language using Contract Routing Sheet (BUS-F007).

   5.4.4   Business Affairs approves contract: Note: Issues affecting approval of the contract will be resolved by Business Affairs with assistance from the requestor.

   5.4.5   Once the contract is approved and signed by the Chief Financial Officer or designee, it is executed.

      5.4.5.1   One copy is returned to vendor.

      5.4.5.2   Executed original is kept in the Business Affairs office.

   5.3.6   The Business Affairs office updates the Contract Data Base System for the purposes of retrieving copies of contracts for future research or use. Data Base System will contain the following information:

   •   Contract Number: to be assigned upon receipt in the Business Affairs Office

   •   Vendor Name

   •   General Description

   •   Contract Term: beginning and ending dates

   •   Date Approved

5.5   If the contract is funded by an Individual School Account (ISA):

   5.5.1   Proposed contract must be approved by Principal: Note: Issues affecting approval of the contract will be resolved with assistance from the requestor.

      5.5.1.1   School sends contract to vendor via mail or email to obtain signatures.

         5.5.1.1.1   Vendor signs original and mails the contract or e-mails a signed copy to the school for execution and processing.

5.5.1.1.2   New vendor must complete a W-9 before Purchase Order is processed.

5.5.2   Principal signs, executes and processes the contract.

5.5.3   Purchase Request form is completed and a P.O. is issued.

5.5.4   A copy of the signed contract is forwarded to Business Affairs office for archival purposes.

5.5.5   Purchase Order and one signed copy are sent to the vendor to begin work.

6.0 ASSOCIATED DOCUMENTS:

6.1   Contract Template (BUS-F006)

6.2   Contract Routing Sheet (BUS-F007)

6.3   Attestation Form (BUS-F020)

6.4   W-9

6.5   T.C.A. §49-5-413(d): Contracting with certain persons who may have contact with certain children

7.0 RECORD RETENTION TABLE:

Identification	Storage	Retention	Disposition	Protection
Professional Service Contract with associated documents	Business Office	Current plus five	Recycle	Secured Building
P.O. Contract with associated documents	Purchasing Office	Current plus six	Recycle	Secured Building
W-9	Purchasing Office	Indefinite	Permanent	Secured Building

8.0 REVISION HISTORY:

Date:	Rev.	Description of Revision:
2/07/07		Initial Release
10/17/07	A	Update 5.2 to include typed contract requirement, change three to two in 5.4.1.1.1, reword 5.4.4, add 6.4 and 6.5, update flowchart
3/5/10	B	Add section 5.2.1.

5/30/12	C	Update 5.3, move 5.5 to 5.3.6, updated Associated Documents
6/13/13	D	Update Point of Contact in 5.2 to Marcia Demorest
10/5/16	E	Changed 5.2.1 to have contracts not on standard template sent to HR Legal Counsel instead of Business Affairs.
1/16/19	F	Added 5.3, renumbered contents following 5.3. Added BUS-F020 to associated documents.
9/14/21	G	Updated point of contact to Chris Reneau
8/14/24	H	Updated point of contact from Chris Reneau to CFO.

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