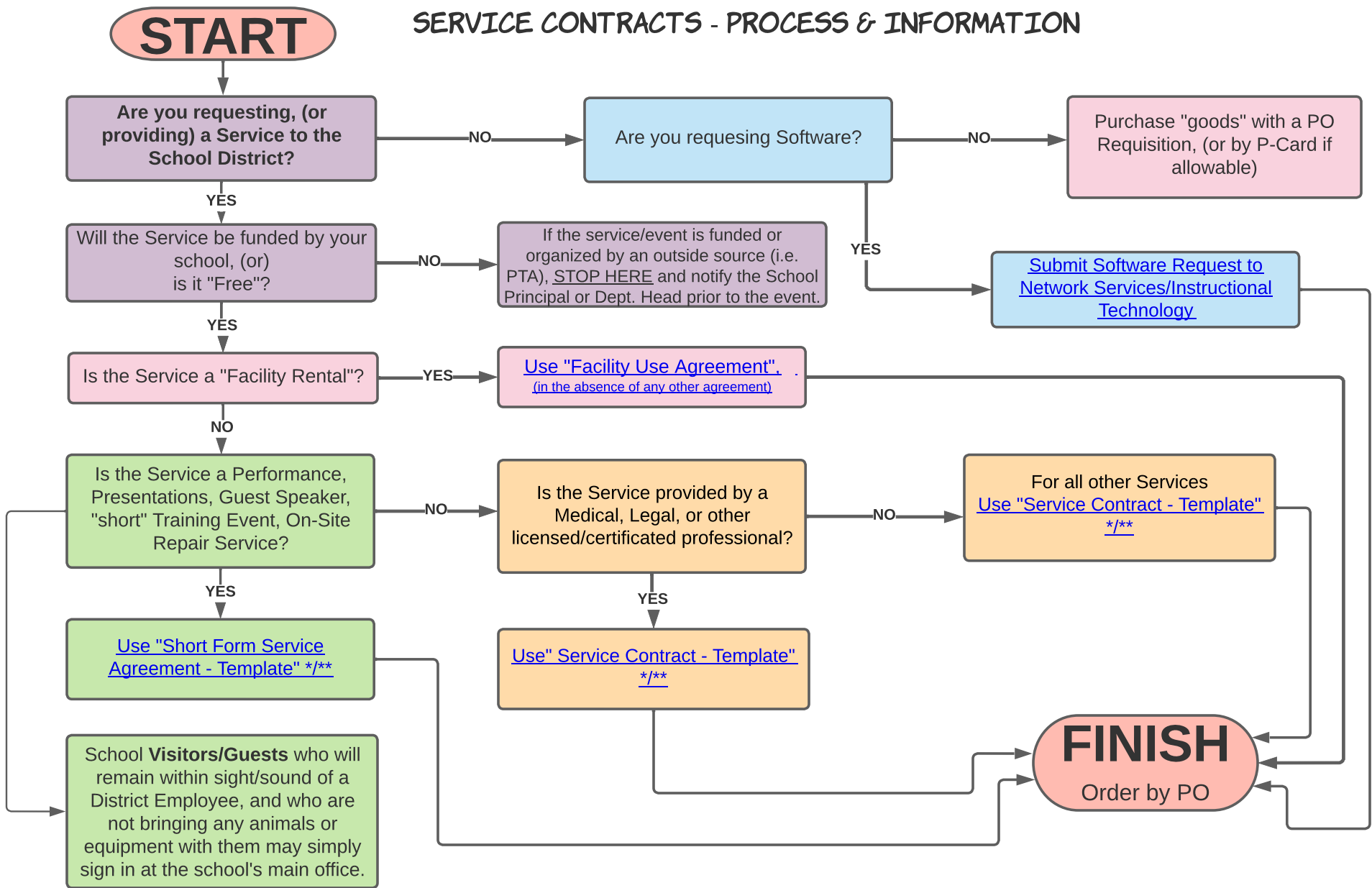


START

SERVICE CONTRACTS - PROCESS & INFORMATION



Definitions:

"Service" = Any work, labor, time/effort; usually provided for a fee. A transaction in which no physical goods are transferred.

"SOW" = Statement/Scope of Work

"Short" = One-time event, up to three (3) consecutive days. May be recurring, or intermittent.

"On-site" = Includes all services provided on school property, and all services provided in the presence of students.

"Software" = Resource that incorporates the benefit of computerization/computation (ie. License, Digital Access/Subscription)

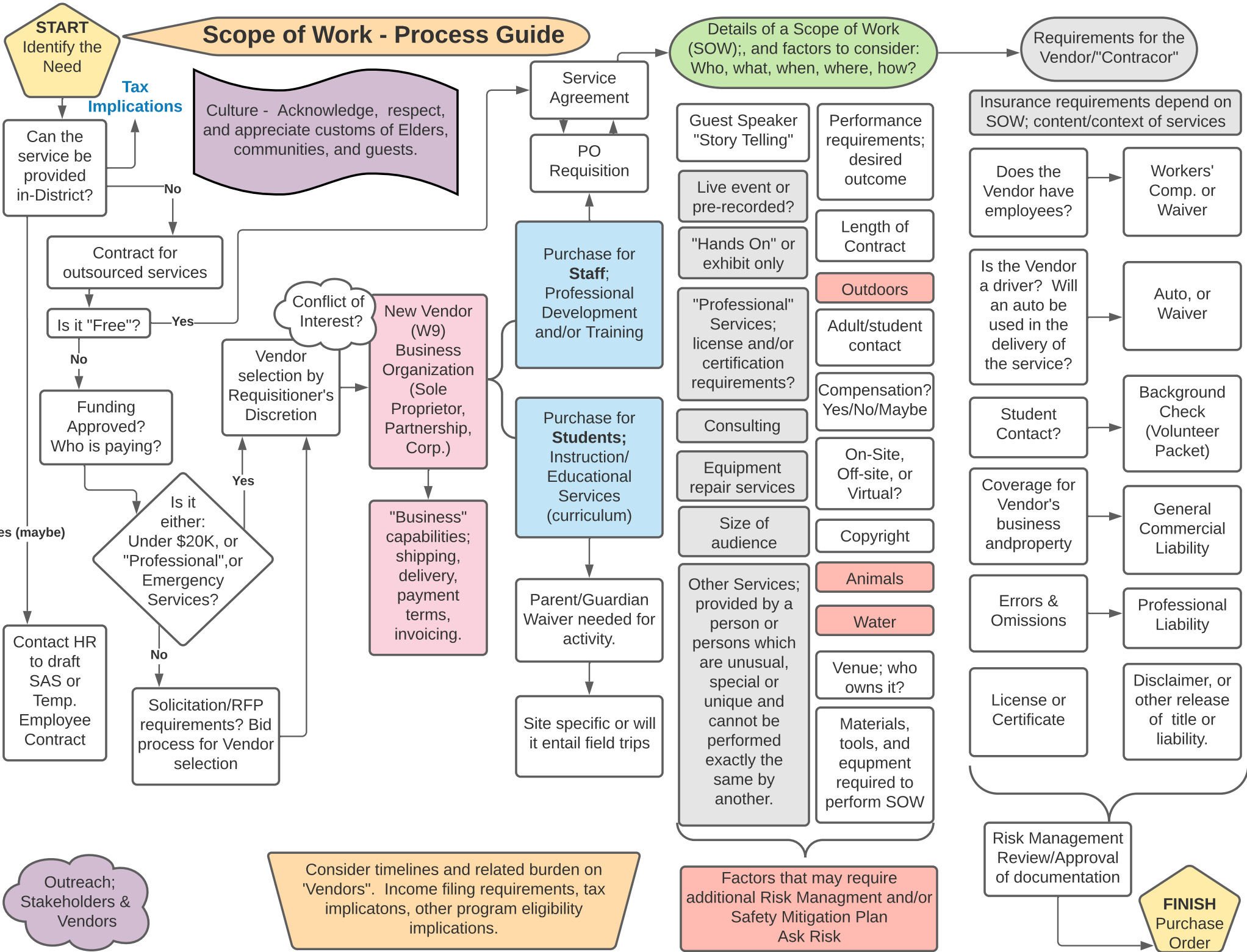
"School District Funded" = General Fund, Grant, or Club Account. "Outside" organizations such as **PTA's** or **"Booster" Clubs** are not financially affiliated with the School District.

"Professional Services" = Licensed or Certificated profession (ie. Doctor, Lawyer, Therapist)

* Standard insurance requirements will apply per SOW (ie. Professional Liability, General Commercial Liability, Auto, Workers' Comp.) Limits are noted in terms of each Agreement/Contract.

** Background checks required for any/all services provided outside the sight and sound of FNSBSD employee.

Scope of Work - Process Guide



Outreach; Stakeholders & Vendors

Consider timelines and related burden on "Vendors". Income filing requirements, tax implications, other program eligibility implications.

Factors that may require additional Risk Management and/or Safety Mitigation Plan
Ask Risk

Risk Management Review/Approval of documentation

FINISH
Purchase Order

Purchasing Checklist for Outsourced Services



Project: _____

- Print this Checklist to use as a guide. Refer to Flow Chart: Service Contracts & Scope of Work - Process & Information for additional guidance.
- Identify the need, funding options, and potential solutions; source "In-District" (i.e. Temp. Employee, or SAS), or outsource "Contracted" services. Funding secured..
- If outsourcing, develop Statement of Work (SOW), and estimate price based on total cost. Contracts in excess of \$20K may have competition requirements. Connect with Purchasing to determine competition and contract requirements per SOW. (SOW) drafted and approved.
- Connect with potential Vendors; furnish SOW and request proposals. Evaluate/compare proposals and select preferred Vendor.
- Furnish Vendor with copies of standard FNSBSD Contract Terms (contract templates), and necessary Vendor forms (i.e. W9 for new Vendors, Workers' Comp. Waivers).
- Complete terms of agreement (i.e. who, what, when, where, how) and submit drafted agreement to Vendor for signature.
- Upon return of Vendor's signed agreement, submit PO Requisition in Munis, attach all documents in TCM, and release into workflow approvals.
- Purchasing will provide final review of documents, obtain proof of insurance as required (per SOW), authorize Purchase Order, execute Contract/Agreement, and furnish Vendor with PO/billing information.
- Vendor issues Invoice and submits to A/P for payment within 30 days.

