

# WHAT FORMS ARE REQUIRED TO PROCESS A CONTRACT?

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## QUOTE/BID/RFP REQUIREMENT (Select ONE of the following): \*

- CONTRACT IS BELOW \$3,000? Submit for direct payment using Individual Service Provider Form. If agreement is BELOW \$3,000, use the *Individual Service Provider Form (ISP)* for direct payment. Submit ISP (and vendor's invoice) directly to Accounts Payable (do **not** submit to Purchasing Department)
- CONTRACT IS BETWEEN \$3,000 - \$60,000? THREE (3) quotes from similar vendors are required (please attach copies of quotes with contract package)
- CONTRACT EXCEEDS \$60,000? Formal bids process (RFP, RFQ) required. Include RFP/Q Contract Approval Cover Sheet where indicated.
- \*SOLE SOURCE EXCEPTION: if the vendor is approved as a **sole source** for the service or product, submit a Sole Source form for approval.

## REQUIRED CONTRACT DOCUMENTS:

### CONTRACT EXCEEDS \$3,000 submit the following:

- FORM: CONTRACT APPROVAL TRANSMITTAL SHEET
- FORM: CONTRACT (submit ONE of the following):
  - SHORT FORM CONTRACT: Complete and submit with the vendor's signature (vendor must execute before the contract can be processed).
  - LONG FORM/PROFESSIONAL SERVICES AGREEMENT: Generally used for contracts which exceed \$60,000 or involve professional services.
  - VENDOR'S OWN CONTRACT: Although not preferred, some vendor's require use of their own contract form.
- FORM: BOARD RESOLUTION:\*
  - BELOW \$60,000 over THREE (3) year period? No prior Board Approval required.
  - EXCEEDS \$60,000 over past **THREE (3) years** to same vendor? Board Approval must be obtained **BEFORE** submitting contract for processing. (The contract compliance officer cannot process a contract until a board approval is obtained).
- INSURANCE: A certificate of insurance (or waiver) is required for all contracts.

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\* Threshold amounts differ for construction related services.