Contracts and Agreements

Workflow Chart

1. Identify Need.

Clearly identify and define the need for service.

2. Review Existing Bids.

Is the need for service included on an existing bid?
If the answer is yes, proceed to 2.a. If the answer is no, proceed to 2.b.

2.a. Services are in Existing Bid.

Identify the bid → Get a quote from the vendor on the bid.

2.b. Services are NOT in Existing Bid.

Identify the total cost.

- Less than $50,000 → Solicit three quotes from potential vendors for comparison.
  Continue on Three Quote Comparison Workflow Chart.
- More than $50,000 → Submit a request for proposal
  Continue on Request for Proposal Workflow Chart.
  OR
  Request approval from the Executive Officer of Finance for noncompetitive process.

→ Enter requisition.

3. Order, Receive, Pay.

PO issued by purchasing. → Receive services or commodity.
Receive services or commodity. → Mark PO as received in MUNIS.
Mark PO as received in MUNIS. → Payment issued to vendor.

- **All items that are highlighted in gold indicate an action required from the school or department requesting the service.**
- **Services may not begin until PO is issued by purchasing.**

Templates and additional documents are available on the JCPS Purchasing Site and JCPS General Counsel Site.

Three Quote Comparison

Workflow Chart

1. Determine if a Professional Services Contract is needed.

Are we relying on the skills or expertise of a vendor that is not interchangeable with other vendors?
For example, this could be an artist or professional speaker.

Yes
Continue on Professional Services Contract Workflow Chart.

No
Solicit three quotes from separate vendors for the needed service.

2. Enter Requisition.

School/department enters requisition.

Cost is under $10,000.
Attach the quote

Cost is between $10,000 and $50,000.
Attach all three quotes.

3. Order, Receive, Pay.

PO issued by purchasing.

Receive services or commodity.

Mark PO as received in MUNIS.

Payment issued to vendor.

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Request for Proposal

Workflow Chart

An RFP is a formalized process to solicit bids or proposals from vendors for a tailored solution. An RFP is ideal for situations where the school or department may not have the experience or expertise to understand all the available options to solve a need.

1. RFP Development and Selection

- Request RFP Template from purchasing.
- Purchasing Advertises RFP.
- Score RFP proposals.
- Recommend winning proposal.

2. Verification and Contract Execution

- Verify insurance and funding.
- Board or Superintendent approve contract.
- Purchasing initiates service contract.
- Inform School/Department once contract is fully signed.

3. Requisition, Fulfillment, and Payment.

- School/Department enters requisition.
- PO issued by purchasing.
- Commodity is delivered or service is rendered.
- School/Department marks PO as received in MUNIS.
- Issue payment to vendor.

- **All items that are highlighted in gold indicate an action required from the school or department requesting the service.**
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JCPS

Professional Services Contract (PSC)

Workflow Chart

A PSC is required when we are relying on the skill or expertise of a specific vendor that is not interchangeable with other vendors. For example, an artist or professional speaker would require a PSC. JCPS's obligation is to pay the vendor, and the vendor performs the service(s).

1. Packet Completion and Departmental Review

- **Complete PSC Packet.** This includes forms for insurance and routing, as well as relevant waivers.
- Assistant Superintendent or department lead reviews materials.
- Chief reviews and approves materials.
- Chief submits materials to General Counsel.

2. Legal Review and Official Authorization

- General Counsel reviews materials.
- General Counsel coordinates edits.
- General Counsel approves materials.
- Finance verifies insurance and funding.
- Board or Superintendent approve contract.

3. Requisition, Fulfillment, and Payment

- Agreement returned to chief.
- Chief routes to vendor and school/department.
- **School/department enters requisition.**
- PO issued by purchasing.
- Commodity is delivered or service is rendered.
- **School/department marks PO as received in MUNIS.**
- Payment is issued to vendor.

- **All items that are highlighted in gold indicate an action required from the school or department requesting the service.**
- **Services may not begin until PO is issued by purchasing.**

Templates and additional documents are available on the JCPS Purchasing Site and JCPS General Counsel Site.

Memorandum of Understanding (MOU)
Memorandum of Agreement (MOA)
Workflow Chart

This memorandum is required for any partnership between JCPS and an external party in which both entities have defined duties or obligations, regardless of whether JCPS incurs financial expenses.

1. Template Completion and Departmental Review

- Complete MOA/MOU template.
- Assistant Superintendent or department lead reviews materials.
- Chief reviews and approves materials.
- Chief submits materials to General Counsel.

2. Legal Review and Official Authorization

- General Counsel reviews materials.
- General Counsel coordinates edits.
- General Counsel approves materials.
- Finance verifies insurance and funding.
- Chief uploads document to Board agenda.
- Board approves agreement.

3. Requisition, Fullfillment, and Payment

- Chief returns to vendor and school/department.
- School/department enters requisition.
- PO issued by purchasing.
- Commodity is delivered or service is rendered.
- Agreement terms are followed by vendor.
- School/department marks PO as received in MUNIS.
- Payment is issued to vendor.

- **All items that are highlighted in gold indicate an action required from the school or department requesting the service.**
- **Services may not begin until PO is issued by purchasing.**

Templates and additional documents are available on the JCPS Purchasing Site and JCPS General Counsel Site.

Data Memorandum of Agreement (MOA)
Workflow Chart

This memorandum is required whenever JCPS partners with a vendor and provides or pulls data that is shared with the vendor.

1. Complete an inquiry and draft an MOA.

- Complete the JCPS Research & Evaluation Inquiry.
- ARSI determines if the MOA is necessary, or recommends alternative.
- ARSI drafts MOA in collaboration with the related department.
- Assistant Superintendent or department lead reviews materials.
- Chief reviews and approves materials.
- Chief submits materials to General Counsel.

2. Legal Review and Official Authorization

- General Counsel reviews materials.
- General Counsel coordinates edits.
- External partner signs the agreement.
- Chief uploads document to Board agenda.
- Board approves the agreement.

3. Proceed and review agreement annually.

- Department and external partner recieve approved agreement.
- JCPS shares data within paramaters set in the agreement.
- Agreement is reviewed annually.

- **All items that are highlighted in gold indicate an action required from the school or department requesting the service.**
- **Services may not begin until PO is issued by purchasing.**

Templates and additional documents are available on the JCPS Purchasing Site and JCPS General Counsel Site.

Data Privacy Agreement (DPA)
Workflow Chart

This is the approval process required whenever JCPS purchases software, apps, or extensions that automatically share student and/or staff data with an outside vendor. This is completed after or with an RFP.

1. Application and worksheet completion.

School/department submits Digital Review Application.

→ Digital review process is completed.

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The DPA Draft is sent to the vendor by IT.

← Completed DPA draft and vendor edits go to General Counsel

2. Legal Review and Official Authorization

General Counsel reviews DPA draft and any edits.

→ General Counsel returns materials to the Chief.

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Vendor signs DPA

← Chief submits DPA to Board agenda or Superintendent.

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Board approves and/or Superintendent signs DPA.

3. Requisition, Fulfillment, and Payment

Signed DPA returned to chief.

→ Chief returns to vendor and school/department.

↓

School/department enters requisition.

← PO issued by purchasing.

↓

Commodity is delivered or service is rendered.

→ Payment is issued to vendor.

↓

School/department marks PO as received in MUNIS.

- **All items that are highlighted in gold indicate an action required from the school or department requesting the service.**
- **Services may not begin until PO is issued by purchasing.**

Templates and additional documents are available on the JCPS Purchasing Site and JCPS General Counsel Site.