



INSTRUCTIONS FOR COMPLETION OF CONTRACT FACT SHEET

Purpose:

The Contract Fact Sheet/Resolution Request Requirement Check List is to be completed for all contracts/resolution requests to be presented to the Camden City Board of Education for review and approval.

**ALL REQUESTS FOR
CONTRACTS/RESOLUTION MUST BE SENT
TO THE BUSINESS ADMINISTRATOR.**

**Approvals of appropriate Assistant
Superintendents should be obtained prior to
sending to the Business Office.**

The intent of this fact sheet is to provide sufficient information for a thorough administrative review, as well as Board review prior to approval. The information provided on this sheet will assist in the approval process by focusing on:

- Ensuring the type of contract is appropriate for the purchase/service being requested.
- Identifying how the purchase/service supports district goals, especially those established in various planning documents such as the Three-Year Operational Plan, Professional Development Plan, Technology Plan, etc.
- Ensuring adequate funds are available for the purchase/service request.

For assistance with contracting, please contact the Purchasing Department. If questions or uncertainty on the type of contract needed, contact Purchasing before proceeding.

Document Required:

- W-9 Request for Taxpayer Id Number & Certification
- State of NJ Business Registration Certificate
 - All vendors must be registered for PO's/ contracts over \$4,515.
 - Forms and proof of registration information

can be found at:

http://www.state.nj.us/treasury/revenue/getting_registered.htm#busentity

- State of NJ Certification of Employee Info (Affirmative Action) Report
- Proof of Insurances
- Bonds & Surety Disclosure & Certification Form
- Bid Bond
- Executive Order 117 PL 51 (Pay to Play)-bids/ contract over \$17,500
- Vendor Qualifications
- Contract

How to Complete the Fact Sheet:



The form is to be completed by the school or department requesting approval of a contract/resolution. Be sure to complete:

- Identification information for the requested Firm/Vendor.
- Requesting school/department and person completing the form.
- A statement on the work to be performed or items to be purchased.
 - Describe the work to be done in detail.
 - Population to be served.
 - Provide the deliverables to be provided through the contract.
 - Term Dates.
- Cost of the contract including (if applicable):
 - Cost per item and total.
 - Hourly rate and total.
 - Other price categories that relate to scope of work.
- How the purchase/service supports district goals — especially related to the Three-Year Plan, Professional Development Plan, Technology Plan, specific Curriculum and Instruction goals, etc.

Contract Type:

The following guidance should be followed to determine the type of contract that is needed to purchase goods or services.

Is bidding required? The purchase of goods or services over \$36,000.00 requires the solicitation of bids from qualified vendors. It may be advantageous to the district, however, to solicit bids below this threshold to ensure competitive pricing. Contact the Purchasing Department for guidance.

Appropriate Quotation/Proposal Information:

- Between \$1,000 and \$5,400 – at least 3 telephone quotations
- Between \$1,000 and \$36,000 – Waiver of quotations
 - Sole Source Justification Form
 - Professional Services
- Between \$5,400 and \$36,000 – at least 2 written quotations
- Over \$36,000 – advertised bid
- State Contract # _____
- Change Order – Original Purchase Order # _____
- Minority Set Aside

If bids are not required, an explanation must be provided to describe the justification for not bidding.

If bids are required, and the lowest bidder is NOT chosen, an explanation must be provided. Justification for this can be instances where the lowest vendor is not able to meet other bid requirements: not able to deliver timely, insufficient supply, offering substitute items that are not acceptable, other vendor requirements that are not acceptable to the district, etc.

DEFINITIONS:

Extraordinary Unspecifiable (EUS):

N.J.S.A.18A:18-2(g) describes EUS as "... services which are specialized and qualitative in nature requiring expertise, extensive training and proven reputation in the field of endeavor."

EUS is a determination that is difficult to define and rarely used for services where the cost exceeds the bid threshold (currently \$36,000.00). EUS is used in the event services are needed that are of short duration and require an extraordinary level of expertise, knowledge or experience as to not be able to draft specifications. Examples of such services might be: specification drafting, information technology feasibility surveys and design of systems. These are only examples; the final determination of use of EUS is determined by the Business Office in consultation with legal counsel. Determinations will favor a "fair and open" process wherever possible. If the requested contract falls into this definition, a clear statement of justification must be included on the Fact Sheet. The EUS exception is not permitted for purchases made with federal funds.

Professional Services:

N.J.S.A.18A:18A-2(h) describes Professional Services as "...services rendered or performed by a person authorized by law to practice a recognized profession, whose practice is regulated by law, and the performance of which services require knowledge of an advanced type in a field of learning acquired by a prolonged formal course of special instruction and study as distinguished from general academic instruction or apprenticeship and training. Professional services may also mean services rendered in the provision or performance of goods or services that are original and creative in character in a recognized field of artistic endeavor."

This type of contract is usually reserved for those professions that require some type of state licensing: doctors, lawyers, certified public accountants, certificated school administrators or professionals, plumbers, engineers, etc. A "fair and open" process using a Request for Proposal (RFP) is generally used for services where the cost exceeds the bid threshold. Waivers may be granted by the School Business Administrator in consultation with the State Monitor. No waivers are permitted for purchases made with federal funds

If a waiver is requested, a clear statement of justification must be included on the Fact Sheet.



Resolution Request Requirement Check List

ALL RESOLUTION PACKETS ARE DUE IN THE BUSINESS OFFICE THE 1ST OF EVERY MONTH. *Be concise, brief, and clear in your narratives. Make sure that your information is submitted by the due date.* **NO EXCEPTIONS!**

Yes	No	N/A	CHECK LIST of the documents required with a request to process a resolution pursuant to the district's contract agreement:
			From the Contractor
			<i>(Prior to approval):</i>
			SCOPE OF SERVICE – this is an explanation of the services that are to be provided. It should included specific goals and objectives; to whom, what and where.
			TERMS OF AGREEMENT – this includes the beginning and ending date for the services being provided.
			COMPENSATION – this includes the costs per hour/per day and total for the service or supply.
			INSURANCE/INDEMNIFICATION – a certificate of insurance is required.
			LICENSES/APPROVALS – this includes copies of all licenses, permits, and certifications.
			BUSINESS REGISTRATION CERTIFICATE - this is a State requirement and can be obtained at: www.nj.gov/dca/lgs/lpel/index.shtml
			FINGERPRINTING/BACKGROUND CHECK – this may be required by law or district policy for the provisions of the services being provided.
			AFFIRMATIVE ACTION CERTIFICATE – this is a State requirement in accordance with P.L. 1975c.127 (N.J.A.C. 17:127) and Appendix B must be attached to the agreement.
			POLITICAL DISCLOSURE FORM- (“Pay to Play”) – If it is a no bid contract over \$17,500 this form must be completed and is available at: www.nj.gov/dca/lgs/p2p/index.shtml
			RESUME -this will reflect background and qualifications of the contractor.
			From the District
			<i>(Prior to approval):</i>
			NARRATIVE – A short paragraph explaining why you are in support of this recommendation; clearly show alignment of the provider services with district goals and objectives, New Jersey State Core Curriculum Content Standards (if applicable), student’s IEP’s, and other related statutory requirements.
			PROFESSIONAL SERVICE CONTRACT *– Proof that you received quotes from three or more providers and/or copy of advertisement for the service for amount less than \$36,000 or RFP for amount greater than \$36,000.
			STATE CONTRACT VENDOR – Provide State Contract Number.
			“SOLE SOURCE” or “PROPRIETARY” PROVIDER* - a narrative must be included which outlines why this provider was selected. That narrative must include an evaluation, information on the provider’s quality of service, past history and past service to the district, amount of previous contracts and evaluation of effectiveness of previous contracts as measured by contractual outcomes.
			REQUISITION* – this will identify the service or supply with the appropriate account number and appropriate signatures for approval. Should also identify if bid, quoted, RFP, State Contract or Ed Data.
			COMPENSATION – this is the cost not to exceed (which is the budgeted amount) for the service.

*Items will be confirmed by the Purchasing Agent

Verified by above Signature

Date

Confirmed by Initials