

## Helpful Hints for Contract Processing

### TAMU-CC Contracts Administration

(rev. November 19, 2024)

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*The most important thing to remember is that the Contracts office is here to assist you. We want you to make that purchase, obtain that software, buy that sports equipment, send those students to a clinic to obtain experience, secure that speaker, or have that art show!*

#### A. Overview.

- 1) Looking for our Department's website? <https://www.tamucc.edu/finance-and-administration/financial-services/contracts/index.php>
- 2) TAMU-CC's President's Delegation of Authority for Contract Administration can be found on our website.
- 3) **Are you aware that by you signing contracts, memorandums, affiliation agreements, etc. for your department, that you may be held personally liable for the \$ amount and terms and conditions?** The President's Delegation of Authority for Contract Administration is a good document for you to become familiar with. There are a handful of people at the University authorized to sign contracts. Not sure? Send it on over to [contracts@tamucc.edu](mailto:contracts@tamucc.edu) and we will take a look for you.
- 4) We have several templates on our website to assist you. Please keep in mind that several of our templates are just that – templates. We are happy to work with your department in tailoring agreements to fit your needs. These templates have been reviewed, edited, and approved by System Office of General Counsel ('OGC').
- 5) Have you seen our contract review flowchart located on the Contracts website? This will give you an idea of what happens after you send us an agreement for review.
- 6) Our general email address is [contracts@tamucc.edu](mailto:contracts@tamucc.edu) Email messages you send to this address will be automatically delivered to both the Contracts Manager and Contracts Coordinator. You are always welcome to email us individually as well.
- 7) Send [contracts@tamucc.edu](mailto:contracts@tamucc.edu) the proposed contract you have received from the vendor or affiliate, along with the requisition number and \$ amount. We then take this initial information and enter it into our contract log.
- 8) We strive to have your contract reviewed or renewal letter drafted and sent back to you or the vendor/affiliate in final format anywhere between 7 to 14 days depending on complexity

and our review queue of contract requests for review or drafting. Depending on the dollar amount, the contract may need additional signatures or need to be reviewed by System Office of General Counsel. OGC reviews contracts for all of the A&M campuses (as needed), so their review could take 4 to 12 weeks and in some cases could be longer. We coordinate all contract reviews with OGC and help to expedite their review as much as possible.

- 9) If you are purchasing a software license or a subscription, or your contract discusses or proposes transmittal or access to student information, the contract will also be sent to the Information Technology department for IT team review. They will review for compatibility to TAMU-CC system and/or duplication of software services; information security (such as data we may be sharing with the vendor, etc.), and Electronic and Information Resources (EIR Accessibility).

## **B. Frequently asked questions.**

- 1) **How do I know if I need to send a quote or contract to [contracts@tamucc.edu](mailto:contracts@tamucc.edu)**
  - a) If you have received a contract or quote document from your vendor/affiliate that has specific terms and conditions that requires a signature on that document – you will want to send it to [contracts@tamucc.edu](mailto:contracts@tamucc.edu) for review and signature. Some vendors have terms and conditions on a quote with a signature line, but do not really require a signature. Check with your vendor first.
- 2) **I have created my requisition how will the Purchasing Department know I am working with the Contracts Office and that a contract needs to be signed before the purchase order gets issued?**
  - a) The Buyers in the Purchasing Department will not know unless you notify them. **Be sure to make a make a notation in Islander Buy and check that box that says ‘route to Procurement’ which lets them know that a contract is pending review and signature**, and to hold on issuing the purchase order. If you do not check that box and the dollar amount is under \$5,000.00, the system will automatically generate a purchase order without the signed contract. Should that occur, the Contracts office will stop its review and not be signing any contract as the purchase order has been issued and considered as the ‘contract’.
- 3) **What if I do not want to send my contract or quote that has terms and conditions that require a signature to the Contracts Office?**
  - a) Again, becoming familiar with the President’s Delegation of Authority document will help guide you with the types of agreements requiring signature.
  - b) How much is that contract for? Does it / will it exceed \$24,999.99? You will want to call or email the [buyers@tamucc.edu](mailto:buyers@tamucc.edu) in the Purchasing Department to check what requirements are for your procurement method.

- c) If you are making a purchase through Texas Department of Information Resources ('DIR'), you may be able to work directly through [buyers@tamucc.edu](mailto:buyers@tamucc.edu) and not have to route it through the Contracts Office. If in doubt, send it to the Contracts office for a look.
- 4) **So what happens after I send Contracts an agreement for review and signature?**
- a) We place the contract in our review queue – meaning, that depending on how many others have requested review, we will place your request in line. The contract is then entered into our log. We will send you a quick response email acknowledging your request for review so that you know we received your request. IF you do not receive an acknowledgement from our office within 3 days of your initial request for review, please do not hesitate to reach out to us to confirm we received your request for contract review. As many across the campus do, we receive a high volume of emails on a daily basis, and there is a possibility that we may have overlooked your request.
- b) Most all of the departments that send us requests for review or drafting of a contract prefer to remain the point of contact with the vendor or affiliate.
- c) The Contracts Manager or Contracts Coordinator will review the agreement. If there are edits that need to be made, we generally utilize tracked changes for easier viewing, or will draft an addendum. If you are able to obtain the vendor/affiliate's agreement in editable WORD format - that is always appreciated.
- d) Keep in mind that all contracts (actual or implied) \$200,000.00 and over are required to be reviewed by System Office of General Counsel. Contracts with a lesser dollar amount, or State of Texas terms and conditions/language that we are required to have in a contract that the vendor wants to remove or negotiate that may be complex, will be submitted by Contracts to OGC for their review and opinion.
- e) Our office will then send back to you, the edited document (or document and addendum) so that you can forward to your vendor/affiliate for their review. Again, most departments like to be the face of the University and maintain that one-on-one with their vendor/affiliate. However, there are times when the vendor/affiliate and the Contracts Department will be in direct communication if there are several matters to negotiate.
- f) If there are no edits (or very minor edits) that the Contracts Office needs to make, we will usually sign the agreement fairly quickly and transmit it back to you, so that you obtain vendor/affiliate's signature. Thereafter, you would scan the fully executed document(s) back to the Contracts Office.
- h) Once you have sent us the fully executed agreement, our office will set up a file in our database. As a courtesy, if there is a requisition number tied to the contract, we forward a fully executed copy directly to the Buyers in the Purchasing Department requesting issuance of the purchase order. Please be sure that your Department also

forwards that fully executed contract or follows up with [Buyers@tamucc.edu](mailto:Buyers@tamucc.edu) on issuance of purchase order.

## 5. What information does our Contract database contain?

- a) Our database is called Blueridge. We will set up the vendor/affiliate name, contact, date of expiration, \$ amount, requisition number, etc. We will also scan in the fully executed agreement, certificates of insurance, copies of email messages, and notes.
- b) What is the benefit to your department by having that file setup in our database? We are able to calendar the expiration or renewal date(s) of the contract, as well as set a reminder date of upcoming expiration.
- c) Example: the initial term of your contract is 9/1/24 - 8/31/25; we will set an expiration alarm for 8/31/25, and also a reminder alarm for 30-60 days prior to the expiration date. Some contracts require that we notify the vendor/affiliate 60-90 days ahead of us terminating or renewing a contract.
- d) Many of the contracts we calendar have the option to renew another year or so. You have probably received an auto generated email (from our contract database) on a weekly basis that looks similar to one of the following:

*Courtesy reminder: Term 1/1/2024 - 12/31/24 shall expire soon; will your department be pursuing new agreement for contracts@tamucc.edu to review, or shall we let this expire and turn reminder notification off? Please let contracts@tamucc.edu know either way. Thank you.*

*Courtesy reminder: Initial term 9/1/24 – 8/31/25 w/option to renew annually (up to an add'l 4 years). Would your department like contracts@tamucc.edu to prepare 2025-2026 renewal letter, or shall we let this expire and turn reminder notification off? Please let contracts@tamucc.edu know either way. Thank you.*

- e) We understand that each Department is already utilizing their own tool or method for in-house calendaring of their contract for expiration dates or renewal dates (**You are the Administrator of your contract. It is up to you/each Department's responsibility to calendar and monitor your own agreements**). Blueridge just offers a courtesy backup by sending out reminder email notification for those upcoming dates. It helps protect TAMU-CC by staying current with agreement term, so that continuation of services is not disrupted.

## 6. Does your contract or event require a Certificate of Insurance?

- a) Usually all agreements that the Contracts Office reviews, edits, or signs will have mention of insurance. Most all of our templates have the language already inserted.

- b) A more comprehensive explanation on insurance can be located at <https://www.tamus.edu/business/risk-management/contact-us/>

Think about it this way – if you are holding an event on our campus and you have a speaker, a performance, bouncy houses, carnival rides, a vendor performing services on the campus, a minimum of general liability insurance, auto liability and worker’s compensation are the base requirements. Other insurance coverage may be required depending on specifics of the work or services to be performed. Having TAMU-CC, Texas A&M University System and its Board of Regents specified as additional insured (and not just a certificate holder) on the Certificate is required. Take a look at some of our templates on our webpage to give you an idea. If there is a question about insurance that we cannot answer, you can bet that we will be in contact with System Risk Management to assist us.

- c) Did you know that if you are retaining a vendor for amusement rides or inflatables requires you to visit the Texas Department of Insurance website and verify that your vendor is listed and has valid compliance stickers for the specific ride or inflatable you are renting?

<https://www.tdi.texas.gov/commercial/documents/arinspectorlist.pdf>

<http://www.tdi.texas.gov/commercial/indexamusement.html>

- d) Campus events with only a Quote or invoice that you sent directly to the Purchasing Department or Accounts Payable office, still require a certificate of insurance be on file prior to event.
- e) Insurance amount changes and/or requests for insurance waivers are submitted by the Contracts Office to System Risk Management for review and opinion.
- f) What does a certificate of insurance generally look like – depending on requirement? See the sample provided on Risk Management’s website

<https://www.tamucc.edu/finance-and-administration/financial-services/contracts/assets/documents/acord-certificate-of-insurance-sample.pdf>

- g) Don’t worry if you are not sure that the Certificate of Insurance you have obtained is sufficient. Send it to [contracts@tamucc.edu](mailto:contracts@tamucc.edu) for review. We will let you know if your vendor/affiliate needs to make some adjustments to it.
- h) Please keep in mind that the final certificate of insurance must be in place prior to performance of services.

### **C. Does this seem like too much information?**

If you aren't sure about whether you need your contract reviewed, send it on over and we will be glad to take a look.

Please try to avoid waiting until the last minute to send your contract to us for review or have us draft that renewal letter. While we will do our very best to accommodate that '*once in a blue moon rush*' that you couldn't avoid and desperately need, we may not always be able to accommodate you based on the pending workload of other contracts that have come in before yours and are patiently waiting in line (or we may be out of the office for one reason or another). Keep in mind that for every '*once in a blue moon rush*' that you ask for, this is pushing another department's need a little lower down in the stack. And remember, if the contract has to go to System Office of General Counsel for review, you are looking at a few weeks for it to be reviewed.

**Thank you.**