

CAMPUS PARTNERS CONTRACT TRAINING

AN OVERVIEW OF THE CONTRACT COVER SHEET

AGENDA

- Introduction
- Campus Partners Website
- Contract Submission Cover Page
- Contract Submission Cover Page Manual
- Questions

INTRODUCTION

Campus Partners Business Office

- Shared Services Center Department
- Supports approx. 15 divisions
- Team:
 - Tammy Schneider, Director
 - Ashley Blumenauer, Manager
 - Sandy Burke, Business Officer
 - Faith Rose, Business Officer
- CampusPartners@du.edu

Who is with us today?

Tell us:

- Name
- Department
- Title
- How long you've been with DU

CAMPUS PARTNERS WEBSITE

[HTTPS://WWW.DU.EDU/SHARED SERVICES/CAMPUS-PARTNERS/INDEX.HTML](https://www.du.edu/sharedservices/campus-partners/index.html)

- Shared Services Center > Campus Partners Customers

Shared Services Center

Home

Employees

Business Officers
& Supervisors

CAMPUS PARTNERS
CUSTOMERS

Vendors

Job Seekers

About Us

- Campus Partners Team
- Forms and Resources: Contract Submission Cover Page and Manual
- News & Announcements: Newsletters

CONTRACT SUBMISSION COVER PAGE

PAGE I

- Summary of when to use the resource


Fillable Form:

- Submitting Unit Details
- Contract Summary



Cover Page

A framed image of a contract submission cover page form. The form is titled 'DU Campus Partners Business Office' and 'Contract Submission Cover Page'. It includes instructions for completion and submission, and a series of input fields for 'Submitting Unit Details' and 'Contract Summary'. The form is set against a white background with a black border.

 UNIVERSITY of DENVER
SHARED SERVICES CENTER

DU Campus Partners Business Office
for use by Campus Partners customers only

Contract Submission Cover Page

This cover page should be completed and submitted with the applicable contract documentation requirements to CampusPartners@du.edu for submission through the necessary review channels. Contracts requiring submission for review include, but are not limited to: performance agreements, licenses, Memoranda of Understanding, and invoices/quotes with terms and conditions. All contract types must be submitted for authorization prior to any event or agreement of services.

Submitting Unit Details:

DU Division/Department- _____

DU Contact Name- _____

DU Contact Email- _____

Contract Summary:

Vendor Name- _____

Vendor Contact Name- _____

Vendor Contact Phone- _____

Vendor Contact Email- _____

Contract Purpose- _____

Contract Start Date- _____ Contract End Date- _____

Total Contract Amount- _____

Contract Amount by Year (i.e. \$1000 in year 1, \$800 in year 2, etc.)- _____

Budget (FOAP/org)- _____

Does this contract require written notice for termination? Yes No

CONTRACT SUBMISSION COVER PAGE

PAGE 2

Markable Checkboxes:

- Contract Documentation Requirements Checklist
- Summary of submission and review process

Contract Documentation Requirements Checklist:

The items in this list need to be submitted, along with this form, to CampusPartners@du.edu.

- Vendor terms and conditions and statement of work (SOW) as applicable
(all documentation provided by vendor)
- Vendor Certificate of Insurance (COI)
(requirement details may be found [here](#))
- [Regulatory Compliance Questionnaire](#)
(Form is required if vendor will have access to any personal data. See form for more details.)
- [Technology Review](#)
(Form is required for all technology-based business/admin applications.)
- Bid documentation
(Two quotes are required for purchases between \$5,000 and \$25,000 and three for purchases above \$25,000. If the purchase can only be obtained from a single source, an email or memo describing the situation may fulfill this requirement. See [Obtaining Quotes](#) and the [DU Procurement Policy](#) for more information.)
- Email correspondence relating to the contract
(any emails providing additional contract details or clarification)
- Approval email from Provost Office if over \$2,500
(Until further notice, the purchase of goods or services over \$2,500 requires pre-approval. Please email CampusPartners@du.edu with the detail of the requested purchase prior to submitting any contract for submission or processing any purchases.)

Upon receipt of your contract documentation, Campus Partners reviews the information for budgetary purposes, ensures completeness, and submits into the Workflow system. The time-frame for completion varies and is dependent upon many factors, including how many units must review the agreement (i.e. Procurement, Legal, Risk). To accommodate an appropriate time-frame, submit the information as soon as possible. It is never too early to submit a contract!

CAMPUS PARTNERS COVER PAGE MANUAL



Manual

- What is the Campus Partners Business Office? ([Introduction](#))
- [What is a Contract: When Should the Cover Sheet be Used?](#)
- Contract Submission Cover Sheet Overview:
 - [Submitting Unit's Details](#) and [Contract Summary](#)
 - [Vendor Terms and Conditions and Statement of Work](#)
 - [Certificate of Insurance and Regulatory Compliance](#)
 - [Technology Review](#) and [Bid Documentation](#)
 - Additional Requirements: [Provost Pre-Approval](#) and [Miscellaneous](#)
- [Form Submission and Review Process](#)
- [Contract Resources](#)
- [How to Save Time in the Future](#)

WHAT IS A CONTRACT: WHEN SHOULD THE COVER SHEET BE USED?

- Apply to all funding sources (University appropriated, federal, or gift), including \$0 purchases
- **Do not sign anything unless you are authorized to do so!**

The cover sheet should be used every time you are engaging with a vendor regarding a contract to ensure that all necessary documentation is compiled. ALL contracts must be submitted for authorization PRIOR to any event or agreement of services.

Proper and detailed completion of the cover sheet expedites the review process by ensuring that there is minimal back-and-forth discussion for clarification of details.

What is a contract: When should the cover sheet be used?

Contract, noun

- A. a binding agreement between two or more parties
- B. a business arrangement for the supply of goods or services at a fixed price
- C. a document describing the terms of an agreement

University contracts for the procurement of goods and services include, but are not limited to:

- Performance agreements
- Licenses
- Memoranda of Understanding
- Invoices/quotes with terms and conditions
- Payments to an entity totaling \$5,000 or more in one year

University contracts that are not for the procurement of goods and services include, but are not limited to:

- Institutional affiliations
- Clinical experiences/internships
- Sponsorships
- Non-Disclosure/confidentiality agreements
- Sale/rental of University goods, services, or facilities

HOW TO GET STARTED

Contract Owner Workflow for Requesting Required Materials:

- 1. Bids**
- 2. Provost Pre-Approval**
- 3. New Tech Review**
- 4. Gather contract, COI, and any other applicable requirements**
- 5. Finalize cover sheet**
- 6. Submit to Campus Partners**

BID DOCUMENTATION

- Contract Bidding Requirements:

Amount	Quotes	Notes
Less than \$5,000	No quotes required	A written quote is helpful to expedite the requisition process
\$5,000.01-\$25,000	Two (2) verbal quotes	Consider the total cost of ownership, a written quote for the vendor you select is needed to create the requisition
Over \$25,000	Three (3) written quotes	Consider the total cost of ownership

- If the purchase can only be obtained from a single source, an email or memo describing the situation may fulfill the bid requirement
- Bidding Exemptions: current University contracts

PROVOST PRE-APPROVAL

- Provost pre-approval is required for expenses totaling \$5,000 and above:

Complete first page of the cover page and email to CampusPartners@du.edu

Campus Partners has a procedure to streamline expense approvals through the
Provost Office.

- Upon receipt of the approval, you may proceed with obtaining the remaining information from the vendor and the completion of the form for final submission

CONTRACT SUMMARY

- Contract Purpose- Include all essential details: **what is the product or service and why is the product or service necessary?**
- Contract Start and End Date
- Contract Total and Total by Year
- Budget/FOAP (fund and org)
- Contract Termination Requirement- **Keep any termination requirements in mind throughout the contract term and inform Campus Partners immediately if any action is necessary**

TECHNOLOGY REVIEW

- [Tech Review Form](#) is required for all technology-base applications
- First portion of form is completed by submitting unit
- Second portion is completed by vendor
- Tech review process is owned by IT and form must be authorized by them prior to sending contract details to Campus Partners
- Permit for some time for IT to review and approve the form when looking ahead and planning for contracts

VENDOR TERMS AND CONDITIONS AND STATEMENT OF WORK

- Terms and Conditions- cover what DU can expect from the vendor and what the vendor can expect from DU: restrictions/requirements, copyright and intellectual property, payment terms, and termination of accounts/service
- **No Terms and Conditions: complete cover sheet and submit with all else**
- Statement of Work (SOW)- timeline of deliverables, itemized costs, standards/criteria for deliverables
- Don't make any assumptions in SOW and request that vendor spell out details clearly
- **One document may be fully inclusive of Terms and Conditions AND SOW requirements**

CERTIFICATE OF INSURANCE AND REGULATORY COMPLIANCE

- Always ask for the vendor to provide their Certificate of Insurance (COI) with the University of Denver named as an additional insured party
- Contact Risk@du.edu with any COI questions
- [Regulatory Compliance Questionnaire](#) is required if the product/service covered by the contract will be used to process personal data
 - Consider if the vendor has access to any data related to an identified or an identifiable person (can be as broad as email address, photos, etc.)
- Ask vendor for clarification on certain aspects of Regulatory Compliance as needed

MISCELLANEOUS REQUIREMENTS

Remember to assume that those involved in the review of the contract do not have any precursory knowledge of the agreement, including Campus Partners

- Gather any supplemental details/documents
- Include Any relevant email correspondence: with vendor, between departmental leadership, etc. that provide additional contract details or clarification

FORM SUBMISSION AND REVIEW PROCESS

If Campus Partners submits contracts into Workflow on your behalf, submit the cover sheet with all applicable documentation to

CampusPartners@du.edu

The time-frame for completion varies and is dependent upon many factors, including how many units must review the agreement (i.e. Procurement, Legal, Risk). To accommodate an appropriate time-frame, submit the information as soon as possible. It is never too soon to submit a contract!

Example of a complicated contract workflow process:

Start	Stop	Directed To	Opened By
11-Aug-2017	11-Aug-2017	Bennett, Christopher	Bennett, Christopher
11-Aug-2017	11-Aug-2017	Nierling, Ulrike	Nierling, Ulrike
11-Aug-2017	14-Aug-2017	DU Contract - Purchasing	Henderson, Edward
14-Aug-2017	14-Aug-2017	DU Contract - Risk	Talmage, William
14-Aug-2017	22-Aug-2017	DU Contract - Legal	Cavanaugh, Candace
22-Aug-2017	05-Sep-2017	DU Contract - Purchasing	Henderson, Edward
05-Sep-2017	06-Sep-2017	DU Contract - Legal	Cavanaugh, Candace
06-Sep-2017	08-Sep-2017	DU Contract - Purchasing	Henderson, Edward
08-Sep-2017	08-Sep-2017	DU Contract - Legal	Cavanaugh, Candace
08-Sep-2017	11-Sep-2017	DU Contract - Purchasing	Henderson, Edward
11-Sep-2017	13-Sep-2017	DU Contract - Purchasing	Henderson, Edward

WHAT ARE YOUR RESPONSIBILITIES?

- **Understand full contract**
- **Keep track of renewal dates and terms**
- **Submit all required materials as early as possible**
- **Verify vendor registration-** Send the [vendor registration link](#) if the vendor is not already established in Banner for payment
- **Confirm vendor submission of invoices to** vendor-invoices@du.edu
- **Review and approve invoices-** Confirm that services have been provided/items have been received as invoiced within the standards outlined in the contract

HOW TO SAVE TIME IN THE FUTURE

PLAN AHEAD!

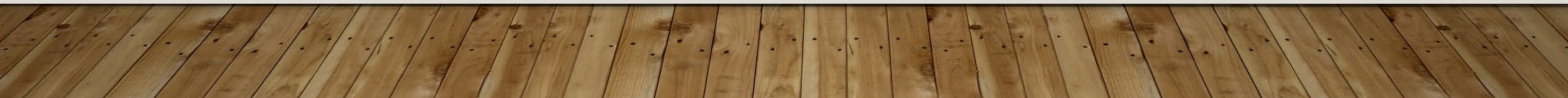
IT IS NEVER TOO EARLY TO SUBMIT A CONTRACT!

USE CAMPUS PARTNERS AS YOUR BUSINESS OFFICE SUPPORT SYSTEM!

- In April-May of each year, gather any materials for contracts and POs planned in the following fiscal year (July-June)
- Think about contracts that are repetitive, those that renew on a yearly basis, and any forthcoming events
- Request pre-approval for expenses to total \$5,000 and above during the planning process

CONTRACT RESOURCES

[SSC Knowledge Base](#) (*PioneerWeb>Employee tab>My Resources*)

- [Procurement Policy](#)
 - [Obtaining Quotes: Learn when quotes are required for a purchase](#)
 - [How to Determine If Your Purchase Requires the Use of a Contract of Purchase Order](#)
 - [Buying and Paying Guide \(How to pay for your purchases\)](#)
 - [Vendor Insurance Requirements](#)
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THANK YOU!!

Questions?