

Procurement Policy Updates

Camille Atkinson, Contracting Officer
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Agenda

Introduction

Signature Authority

Contract Routing

Compliance Documentation

Catering

Risk Mitigation

Introduction

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Procurement Coordinators

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Signature Authority

Should contracts be signed before or after events/services performed?

We should have a signed agreement in advance per SAO policy and also to protect the Institute.

Can I sign an Agreement? How about my Supervisor?

Please refer to the [Delegation of Presidential Authority](#) for a list of who is authorized to obligate GT to a contract. In general, only a Contracting Officer in the Procurement Department can sign Agreements.

Remember: If you or someone in your department signs an Agreement, you can be held personally liable for any charges from the vendor. Only **AUTHORIZED** individuals can obligate GT funds.

Signature Authority

When should I expect a signed agreement back?

Most agreements we review require redlining in order to comply with all of the guidelines set in place by the state.

Typically you will hear back from Procurement within 48 hours regarding your contract. There may be additional questions before an agreement can be signed.

Keep in mind that there are oftentimes compliance requirements and allow for extra time before your event.



Contract Routing

- The department should submit a requisition when the agreement is for an amount \$2500 or greater and the event is taking place in the current fiscal year.
- The department should submit a ServiceNow ticket if an agreement falls into any of the following categories:
 - If a requisition was already entered for less than \$2,500
 - If the agreement is for Hotel and Event bookings for future year events
 - It is a hotel room block, where the entire fee will be paid by the individuals booking the rooms and does not commit any GT funds
 - It is being paid directly by the GT Foundation

Contract Routing Through ServiceNow

The screenshot displays the Georgia Tech ServiceNow portal. The browser's address bar shows the URL `gatech.service-now.com/home`. The page header includes the Georgia Tech logo and the text "Services & Support". Below the header, a navigation bar contains links for "AGENT PORTAL", "HOME", "KNOWLEDGE", "MY REQUESTS", "MY APPROVALS", and "SYSTEM STATUS". The user's name, "KENDALL GRAHAM (BUSINESS SERVICES)", is displayed in the top right corner. The main content area features a large banner with the text "How can we help you?" and a search bar labeled "Describe your issue or topic". Below the banner, four service categories are presented in blue boxes with yellow headers: "Teaching / Learning" (Academic Technology Resources for Faculty and Students), "Technology" (A/V • Accounts • Email • Network • Support), "Financials" (Workday • Policy • Training), and "Human Resources" (HR Practitioners • Employees). The "Financials" box is highlighted with a red border. The URL `https://gatech.service-now.com/technology` is visible in the bottom left corner of the browser window.

Contract Routing Through ServiceNow

Employee-facing registry content x Financials Home - Georgia Tech F x +

gatesch.service-now.com/financials

Financials Administration Support

Type your question - Ex: "How do I create an expense report?"

Known Issues

Defects • Errors • Status

General Workday

Audit • Report • Planning

Expenses

Travel and Expenses

Procurement

eProcurement • BuzzMart • PCard

Financial Accounting

General Ledger • Accounting

Grants

Manage • Award Lifecycle • Deltek

Business Assets

Asset Mgmt • Surplus • Logistics

Supplier Accounts

Vendor Mgmt • Accounts Payable

Reporting

Request • Change • Update

Banking and Settlement

Treasury Services

Foundation Data Model

FDM • Request Changes

Workday Tips & Tricks

[Workday Update 7/12](#)
Planned JAGGAER System Downtime, My Georgia Office Products Price Increase, Updates to COVID-19 Travel Guidance
Jul 12, 2021

[Workday Update 6/22](#)
YE Close Downtime, Campus Reporting Dashboard updates, Commitment Accounting Office Hours
Jun 22, 2021

[Workday Update 6/8](#)
COVID-19 Travel Questionnaire update, new Campus Reporting Dashboard Links, YE Close Help, Delegations
Jun 8, 2021

Financials Questions?

Request Help

Answer a few questions and we'll handle the rest.

Start >>

Call Us

Speak with a financials expert.

404-385-5555 >>

Contract Routing Through ServiceNow

The screenshot displays the ServiceNow Financials interface. The browser address bar shows the URL: `gatech.service-now.com/financials?id=sc_category_knowledge&sys_id=078ccdf8db7be700391b9837db9619af`. The top navigation bar includes links for AGENT PORTAL, HOME, KNOWLEDGE, MY REQUESTS, MY APPROVALS, and SYSTEM STATUS. The user is identified as KENDALL GRAHAM (BUSINESS SERVICES). The breadcrumb trail indicates the path: HOME > FINANCIAL SERVICES > PROCUREMENT. A search bar is located on the right side of the breadcrumb trail.

The main content area is titled "Procurement" and includes the sub-header "eProcurement • BuzzMart • PCard". It is divided into three main sections:

- Categories**: A list of categories on the left sidebar, including General Workday, Expenses, Procurement (highlighted), Financial Accounting, Grants, Business Assets, Supplier Accounts, Reporting, Banking and Settlement, Foundation Data Model, and Workday App Security.
- Service Catalog**: A section with a red border containing a "Request Help" link with the description "Submit an incident related to financial services" and a "View all services" link.
- Browse Knowledge**: A section listing knowledge articles with view counts and dates:
 - Close Open Purchase Order (570 Views, about a year ago)
 - Procurement Troubleshooting Guide (500 Views, about a year ago)
 - Submitting an Invoice for Bill-Only Requisition (281 Views, about a year ago)
 - Requisition and Purchase Order Status Definitions (127 Views, about a year ago)
 - Legacy PO Receipt Form (93 Views, about a year ago)
- Job Aids**: A section listing job aids:
 - Change Order Request
 - Requisition - Request Non-Catalog Items
 - Receipt
 - Requisition - Request Catalog Items
 - PCard Transaction Verification
 - Requisition - Create from Templates and Other Requisitions
 - Supplier Contract - Procurement
 - Purchase Order
 - Requisition - Create from My Procurement Favorites

Below the Categories list, there is a "Training Guides" section with links for "Workday Procurement (Web-based)" and "Workday PCard Process and Approvals (Web-based)".

Contract Routing Through ServiceNow

Employee-facing registry content x Request Help - Service Catalog - x

gatech.service-now.com/financials?id=sc_cat_item&sys_id=51832479db39b740fc9efe8d0f96191f&sysparm_category=078ccdf8db7be700391b9837db9619af

HOME > FINANCIAL SERVICES > PROCUREMENT > REQUEST HELP

Search

Request Help

Submit an incident related to financial services

*Requested By
Kendall Graham (Business Services)

*Requested For
Kendall Graham (Business Services)

*Preferred Contact Method
Email

☐ The 'Requested for' user was not listed in the search

*Contact Information
kendall.graham@business.gatech.edu

*Business Service
Procurement

*Short Description
Event Agreement for Signature

*Detailed Description
Hello, please see attached agreement for [Event Name] on [Date] being held at [Venue]. If there are any questions, please reach out to [Contact].

*Who is this impacting?
This is impacting my college/department/building

*How is the ability to learn/teach/work impacted?
This issue needs to be addressed, but the ability to learn/teach/work is not significantly diminished

Knowledge results

SUBMIT

Contract Routing Through ServiceNow

Employee-facing registry content x Request Help - Service Catalog x

gatech.service-now.com/financials?id=sc_cat_item&sys_id=51832479db39b740fc9efe8d0f96191f&sysparm_category=078ccdf8db7be700391b9837db9619af

Custodial Fund Agreement - DocuSign Instructional Form
signed (DocuSign) document called the Custodial Fund Agreement. This knowledge article contains a PDF Attachment with instructions only on how to use DocuSign for the electronic signature. You can download the actual Custodial Entity Agreement Form as a PDF-fill-able form, here. The attached...

Custodial Fund Agreement
the Custodial Fund Agreement - DocuSign Instructions. This will be your guide on how to proceed. Download the PDF-fill-able Custodial Fund Agreement Form attached to this knowledge article. Fill out the form...

Custodial Entity - Inactivate/Reactivate existing [Order](#)
Request inactivation or reactivation of an existing Custodial Entity

Custodial Entity - Request new [Order](#)
Request a new Custodial Entity

[SUBMIT](#)

[Add attachments](#)

[System Status](#) [Campus Map](#)
[OIT Main Site](#) [Support/Give](#)
[Accessibility](#)

CREATING THE NEXT* | [Emergency Information](#) | [Accountability](#)

Compliance Documentation

- Before signing off on the event agreement, the following documentation may be needed:
 - E-Verify Affidavit
 - Certificate of Insurance
 - Certification of Funding Form
 - Food & Group Meal Form

E-Verify Affidavit

Who's Responsible for This: Procurement

Who Completes This: The Vendor

Where You Can Find It: You can find this form & related information on Procurement's [website](#)

E-Verify Affidavit

In order to comply with a State regulation, Georgia Tech requires a fully completed, signed and notarized [E-verify affidavit](#) from any vendor that provides labor or services in an amount that exceeds \$2,499.

It is the responsibility of Procurement to obtain this document, however we have found that the request is expedited when the vendor is made aware of the request from their primary point of contact.

Certificate of Insurance

Who Responsible for This : Procurement

Who Completes This: The Vendor

Vendor may need to furnish to GIT a certificate of insurance indicating that the following coverage is in effect and naming officers, agents and employees of the Board of Regents as additional insured.

Insurance Requirements

Type of Insurance	Coverages	
1. Commercial General Liability Occurrence (1996 ISO Occurrence Forms or Equivalent)	Premises & Operations	\$1,000,000/occurrence
	Products & Completed Operations	\$1,000,000/occurrence
	Personal & Advertising Injury	\$1,000,000/occurrence
	Contractual Liability	\$1,000,000/occurrence
	General Aggregate	\$2,000,000
2. Business Automobile Liability		\$1,000,000 CSL
3. Commercial Umbrella Liability		\$2,000,000/occurrence
4. Worker's Compensation (Employer's Liability)	a. Bodily Injury by Accident	a. \$1,000,000/accident
	b. Bodily Injury by Disease	b. \$1,000,000/employee
5. Professional (errors & omissions) Liability		\$3,000,000/occurrence; \$3,000,000 annual aggregate

Certification of Funding Form

- **Who Completes This:** The Department
- **Where You Can Find It:** You can find this form & related information on Procurement's [website](#).

Certification of Funding Form

- Due to COVID-19, we had most of our planned events for 2020 & 2021 cancelled due to state & federal regulations.
- To mitigate risk, we created the Certificate of Funding for Reservation form to ensure that the liquidated costs owed to the venue in the event of cancellation are available.
- This is needed if the liability is over \$25K or Procurement needs assurance that the department has funds available.

Food & Group Meal Form

- **Who Completes This:** The Department
- **Where You Can Find It:** You can find this form & related information on Procurement's [website](#).

Food/Group Meal Form

The Food/Group Meal Form is required when submitting any estimates, invoices, or reimbursements that include food.



Food / Group Meal Event Documentation Form (Effective February 1, 2022)

Purpose: This form is used to provide documentation for all food/group meal purchases funded with institutional, Foundation and sponsored funds. Institutional funds include appropriations, departmental sales/service funds, student activity funds, and auxiliary funds. A copy of this form must be maintained with any P-Card receipt documentation and payment requests submitted to Accounts Payable. *Use this form for meals or food purchased on or after February 1, 2022.* Events using *custodial (previously agency funds)* or processed directly through the GT Foundation OR GTRC do not require use of this form.

For America-to-Go orders, attach form to requisition.

Business Purpose : _____

☐ On campus

☐ Off Campus

Date(s) of Event: _____ **Time (Start/End):** _____

GT Event Sponsor: _____

Approval Signature _____

*Pre- approval by department head/delegate is required for employee business meetings using institutional funds

Type of Activity: ☐ Student Event ☐ Business Meeting ☐ Employee Group Meal ☐ Volunteer Event
☐ Conference, Camp & Workshop ☐ Contract Hospitality ☐ Annual Member Recognition

Participants:

☐ Students ☐ Employees ☐ Non-employees ☐ Volunteers ☐ Conference Attendees

☐ Group event: 15+ participants (reception, banquet, open house) Estimate#: _____

☐ Less than 15 participants. Provide list of participants with associated dept/entity

Meal cost per person: _____

CAN NOT EXCEED \$13/Breakfast, \$14/Lunch, \$23/Dinner. Unless Foundation/GTRC funds are used or sponsor approves

Funding Source: ☐ Student Activity Fees ☐ Custodial Funds ☐ Departmental Sales Rev
☐ Sponsored ☐ Institutional ☐ Auxiliary ☐ GT FDN/GTRC

Worktag(s): _____

Policy Guidance: [\(See policy 5.2.1.9 for detailed policy\)](#)

Foundation Funds	Foundation funded payments for snacks, beverage service, and other meals in support of Institute business may be processed through Accounts Payable. Meal per diem limits and meeting length limits are not imposed. Food and meals related to entertainment and development activities must be processed directly through the FDN.
State and Other Funds	Meals served during employee business/training meetings using Institutional funds must: (1) last 4+ hours, (2) be pre-approved by Dept Head, (3) include a formal written agenda with meeting times, and (4) no breakfast or end-of-meeting lunch or dinner meals. Official student events, volunteer events, and food purchased for official guests and program participants is limited to State of Georgia meal per diem limits, but minimum meeting lengths are not imposed State of Georgia Meal Per Diems limited to \$13/breakfast, \$14/lunch, \$23/dinner per person (incl tax/tip) Payments for alcohol can not be processed through the Institute (see policy for allowable exceptions) Sponsored funds can only be used when specifically allowed by sponsor in writing Meals purchased using Custodial Funds aren't restricted by meal per diem limits, but must be reasonable
Catering	See Student Center website for GT Catering Providers Policy: www.studentcenter.gatech.edu/campuscatering.htm Use of authorized caterers is required for on-campus events over \$400
Payment Info	The Pcard can be used for food purchases that are in compliance with the Food/Group Meal policy Payments made through the Institute are exempt from sales tax. The FDN & GTRC are subject to sales tax

Questions: Submit a ServiceNow ticket to Accounts Payable

FOOD GROUP MEAL DOC FORM 2/2022



CAMPUS CATERING SERVICE PROVIDERS

PRIMARY CATERING PROVIDER

- Georgia Tech's Primary Caterer is [Tech Catering](#)
- Tech Catering has exclusive catering rights in the Student Center, Student Center Pavilion, Exhibition Hall, and West Village Dining Commons

SECONDARY CATERING PROVIDERS

- Georgia Tech has contracted with [Secondary Caterers](#)
- Secondary Caterers are contracted operators and can be used anytime without prior authorization from Administration in non-exclusive locations.

Primary Contact:

Kelly Rowland- Prather Director (GT Catering)
kelly.rowlandprather@dining.gatech.edu

Secondary Catering Contracts

Contracted Secondary Catering Suppliers	Informal Catering	Formal Catering
Affairs to Remember		<input checked="" type="checkbox"/>
Avenue Catering		<input checked="" type="checkbox"/>
Carlyles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Popbar	<input checked="" type="checkbox"/>	
Proof of the Pudding	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Serendipity Catering	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Time To Dine	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

America To Go

- Catering Food Delivery service
- Punchout Service in Jaggaer
- Maximum order limit: \$400
- When to order? When you need quick catering, for example “12 box lunches”.

*Additional Secondary Catering Suppliers contracted with Georgia Tech (i.e. Technology Square restaurants) can be found on the special events website:

<https://specialevents.gatech.edu/resources/catering/companies>

Catering Requisitions

1

Quote & Agreement

Formal Supplier Quote/ BEO/Agreement is needed for purchase justification.

Agreements/ BEOs for off-campus catering must be signed by Procurement.

2

Unauthorized Purchase

Per State Accounting Office policy, a PO should be issued in advance of goods or services being delivered.

Not following this policy, will result in an unauthorized purchase. Form must be attached to requisition.

3

Alcohol

On-Campus alcohol approval attached to quote.

Alcohol charges can not be purchased on state funds.

- E-Verify affidavit for off-campus catering (collected by Procurement)
- Food Group Meal Form attached to requisition
- Exemption Approval documentation must be attached to requisition for on-campus not contracted caterers

Alcohol

Georgia Tech funds cannot be used to pay for alcohol & must be paid for by the Georgia Tech Foundation.

Taxes must be included in any purchases made with Georgia Tech Foundation funds.

Two Payment Options:

(1) All through GT Foundation

(2) You will need two separate invoices: one for the catering/reservation to be paid via Georgia Tech Funds & one for the alcohol to be paid by the Foundation

Risk Mitigation

All agreements are reviewed to ensure that the terms of the agreement align with our standard terms & that we mitigate any risk that could fall on the institution.

Three strategies to mitigate risk:

- Adding our revised “Force Majeure” language into the vendor agreement.
- The possibility of entering a purchase order for any liquidated damages
- Obtaining Event Cancellation insurance

Force Majeure

Sample of Force Majeure language

“Force Majeure” shall mean Acts of God, storms, inclement weather conditions, strike, disaster, civil disturbance, war, riot, acts of public enemy, explosion, epidemic, pandemic, curtailment of transportation facilities, insufficient registrations as reasonably determined by Georgia Tech/Insert proper identifier, or any law, order, rule, regulation, state of emergency, act of or restraint by any governmental body of authority, including federal, state or local authorities and agencies, which by exercise of due diligence such party is unable to avoid, or any other occurrence beyond either party’s control. In the event either party’s performance hereunder is rendered impossible, hazardous, or is otherwise prevented or impaired by a Force Majeure event, both parties shall be excused from their obligations hereunder, neither party shall be liable to the other in connection therewith, and any and all deposits and payments paid to the Hotel/Vendor/Insert proper identifier shall promptly refunded to Georgia Tech/Insert proper identifier.”

Questions

