

Event Agreement Policies and Procedures



## Agenda

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  - Certificate of Insurance
  - Certification of Funding for Reservations
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### Introduction



### Signature Authority (Policy 5.4)

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

We should have a signed agreement whenever a vendor is performing professional services, high risk/high profile/unusual or services.

#### Can I sign an Agreement? How about my Supervisor?

Please refer to the <u>Delegation of Presidential Authority</u> for a list of who is authorized to obligate Ga Tech to a contract. In general, only a Contracting Officer in the Purchasing 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 people can obligate Ga Tech funds.



### Signature Authority (Policy 5.4)

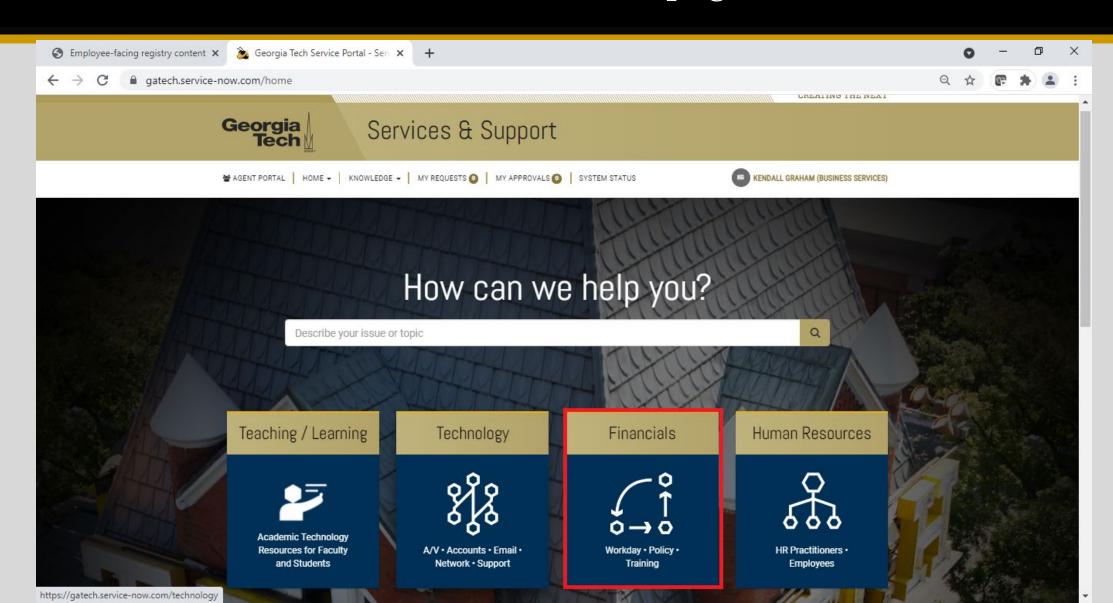
#### When should I expect a signed agreement back?

We rarely have agreements that comply with all of the guidelines set in place by the state. We typically have to review & mark-up these agreements, which could take some time. You will hear back from Procurement within 48 hours regarding your contract.

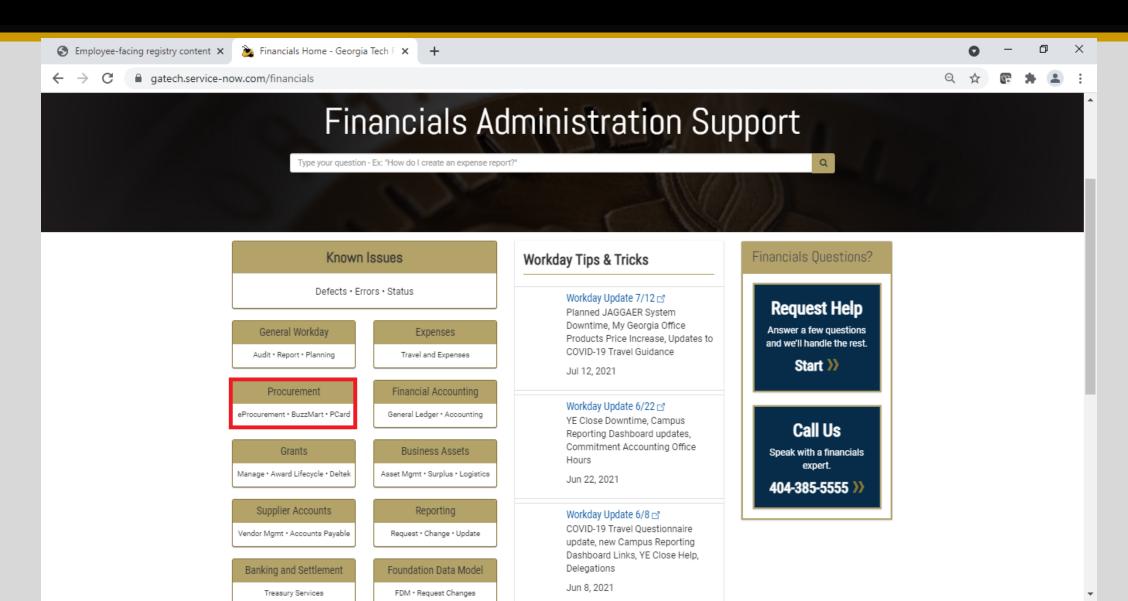
### Contract Routing

- If you have an event agreement that needs to be signed, please send it over via ServiceNow, regardless of amount.
- Once received by Procurement, we will review, obtain any additional documentation, & sign off on the agreement.
- In some cases, you may be asked to place the agreement on requisition for review & signature, but this will be determined by Procurement once the agreement is received.

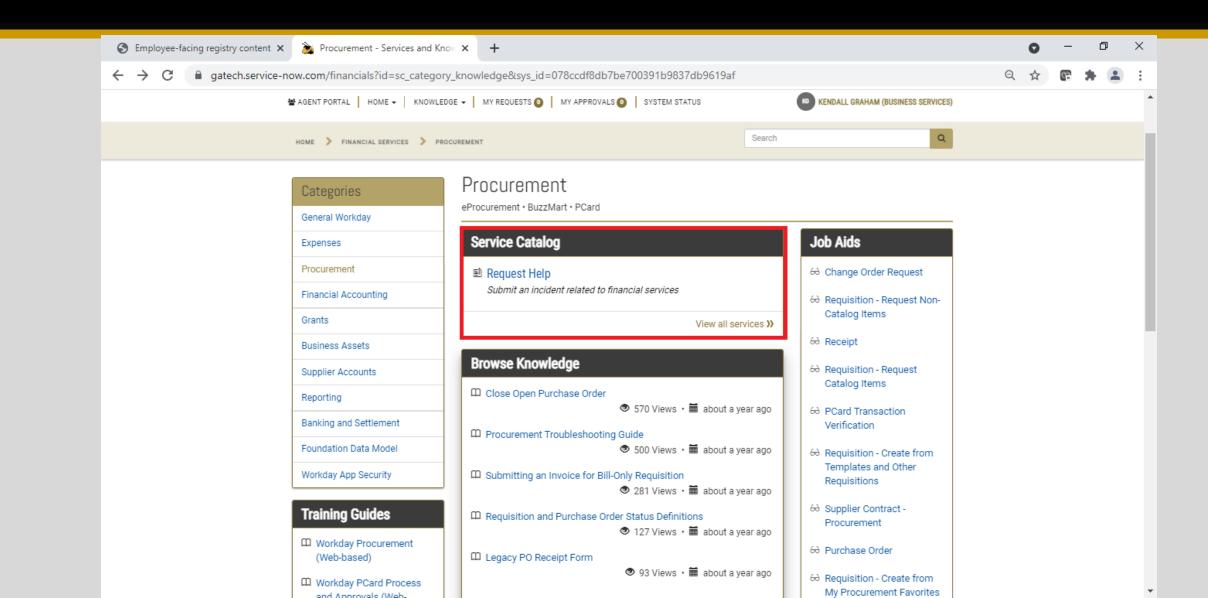
Step 1: Go to gatech.service-now.com/home & click on the "Financials" icon on the home page.



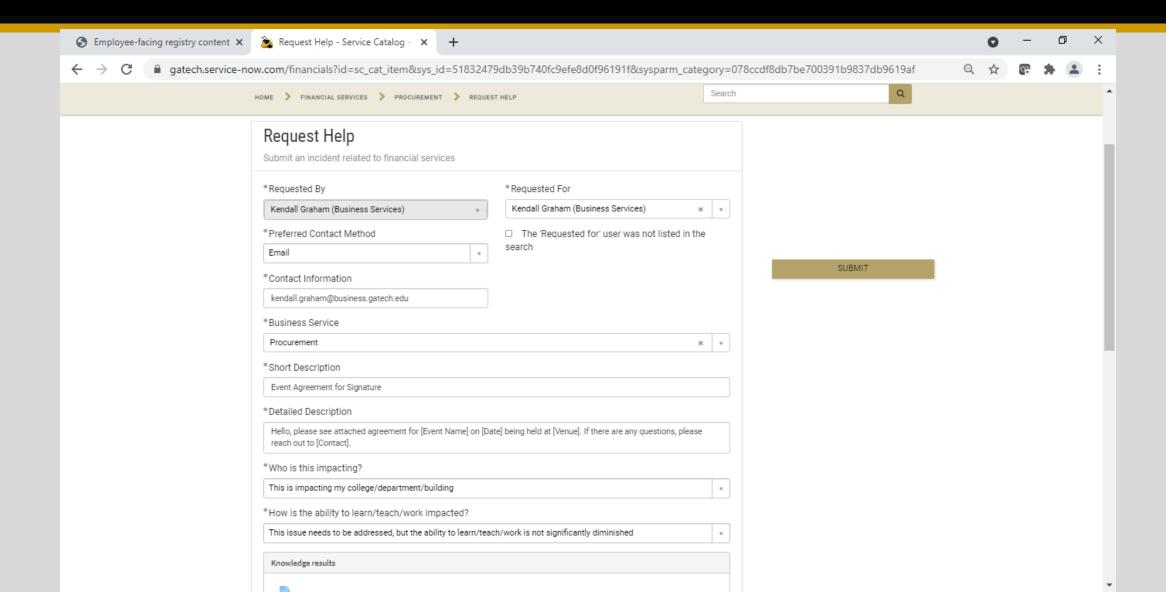
# Step 2: Click the "**Procurement**" button to take you to the Procurement-specific request page.



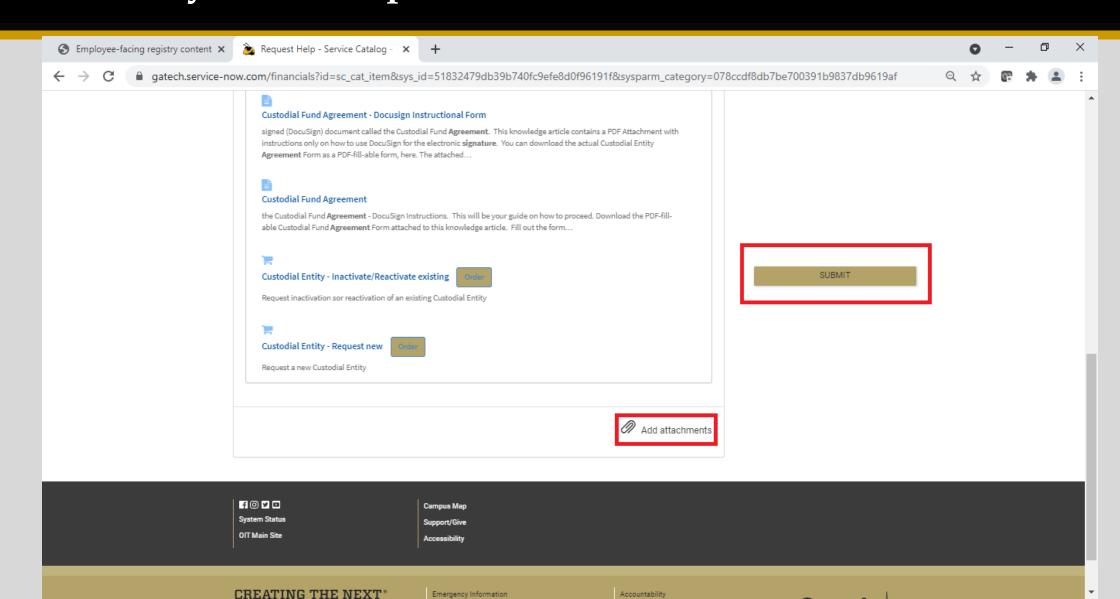
### Step 3: Click "Request Help" to begin your ServiceNow incident ticket.



### Step 4: Fill out the information in the required fields.



# Step 4 (cont.): Scroll down to the bottom of the page, attach your agreement & any other compliance documents, then hit "Submit".



### Compliance Documentation

# Before signing off on the event agreement, the following documentation may be needed:

- E-Verify Affidavit
- Certificate of Insurance
- Certification of Funding for Reservations
- Food & Group Meal Form
- Off-Campus Exception 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 <u>website</u>

### E-Verify Affidavit

- In order to comply with a State regulation, Georgia Tech requires a fully completed, signed and notarized <u>E-verify affidavit</u> from any vendor that provides labor or services in an amount that <u>exceeds \$2,499</u>.
- 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	<u>Coverages</u>	
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

## Certificate of Funding for Reservation

- Who Completes This: The Department
- Where You Can Find It: You can find this form & related information on Procurement's <u>website</u>.

### Certificate of Funding for Reservation

- 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 <u>Certificate of Funding for Reservation</u> form to ensure that the liquidated costs owed to the venue in the event of cancellation are available.
  - This is only needed if the liability is over \$25K.

### 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 <u>Food & Group Meal Form</u> is required for all events where food is being provided.
- Meal per diem limits are imposed for most state-funded events.
- The policy does not allow you to go to a restaurant, sit down, order, and pay for your lunch there.
- You cannot use P-Card for food-related purchases.

### Off-Campus Exception Form

- Who Completes This: The Department
- Where You Can Find It: You can find this form & related information on the Special Events website.

### Alcohol

The "Off-Campus Alcohol Expenditure Form" is required for all off-campus activities or events serving alcohol, regardless of whether reimbursement or payment is requested from Georgia Tech or GTF. Those activities or events include, but are not limited to the following:

- Events at the Georgia Tech Hotel (considered off-campus)
- Development/Entertainment events/dinners
- Research/Business related discussions during a meal
- Off-Campus appreciation/recognition events (including holiday events)
- Any off-campus event where GT Purchasing must sign a contract (form needed in advance of signing contract)



### Alcohol (cont.)

- 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.
  - It is allowable to pay the room reservation/catering portion of an agreement via purchase order & the alcohol via GT Foundation funds.
  - Two Payment Options:
    - All through GT Foundation
    - 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?



# Contact Business Services

404-894-5000

"Your Strategic Business Partner"

# PROCUREMENT & BUSINESS SERVICES

- Accounts Payable
- Business Systems
- •Insurance & Claims
- Logistics
- Property Control
- Purchasing
- Travel





Thank you!

