

Event Agreement Policies and Procedures



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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 [Delegation of Presidential Authority](#) 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.

The screenshot shows the Georgia Tech Service Portal home page. The browser address bar displays gatech.service-now.com/home. The page header includes the Georgia Tech logo and the text "Services & Support". Below the header is a navigation bar with links: AGENT PORTAL, HOME, KNOWLEDGE, MY REQUESTS, MY APPROVALS, and SYSTEM STATUS. The user is logged in as KENDALL GRAHAM (BUSINESS SERVICES). The main content area features a large search bar with the text "How can we help you?" and a placeholder "Describe your issue or topic". Below the search bar are four category tiles: Teaching / Learning, Technology, Financials, and Human Resources. The Financials tile is highlighted with a red border. The Financials tile contains an icon of a circular arrow and the text "Workday • Policy • Training".

Employee-facing registry content x Georgia Tech Service Portal - Ser x +

← → ↻ gatech.service-now.com/home

CREATING THE NEXT

Georgia Tech Services & Support

AGENT PORTAL | HOME | KNOWLEDGE | MY REQUESTS | MY APPROVALS | SYSTEM STATUS

KENDALL GRAHAM (BUSINESS SERVICES)

How can we help you?

Describe your issue or topic

Teaching / Learning

Technology

Financials

Human Resources

Academic Technology
Resources for Faculty
and Students

A/V • Accounts • Email •
Network • Support

Workday • Policy •
Training

HR Practitioners •
Employees

<https://gatech.service-now.com/technology>

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

The screenshot shows a web browser window with the URL `gatech.service-now.com/financials`. The page title is "Financials Administration Support". Below the title is a search bar with the placeholder text "Type your question - Ex: 'How do I create an expense report?'" and a magnifying glass icon.

The main content area is divided into several sections:

- Known Issues**: Defects • Errors • Status
- General Workday**: Audit • Report • Planning
- Expenses**: Travel and Expenses
- Procurement** (highlighted with a red border): 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

On the right side, there is a **Workday Tips & Tricks** section with three updates:

- 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

Below the updates is a **Financials Questions?** sidebar with two buttons:

- Request Help**: Answer a few questions and we'll handle the rest. **Start >>**
- Call Us**: Speak with a financials expert. **404-385-5555 >>**

Step 3: Click “Request Help” to begin your ServiceNow incident ticket.

The screenshot shows the ServiceNow portal interface for Procurement. The browser address bar displays 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, along with the user profile for KENDALL GRAHAM (BUSINESS SERVICES). Below this, a breadcrumb trail shows HOME > FINANCIAL SERVICES > PROCUREMENT, and a search bar is present.

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

- Categories:** A list of links 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 the "Request Help" link, which is also highlighted. Below it is the text "Submit an incident related to financial services" and a "View all services" link with a double arrow icon.
- Job Aids:** A list of links including 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, and Requisition - Create from My Procurement Favorites.

Below the Service Catalog is a "Browse Knowledge" section with a list of articles, each with a title, view count, and date:

- 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)

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

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

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

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

The screenshot shows a web browser window with two tabs: "Employee-facing registry content" and "Request Help - Service Catalog". The address bar shows the URL: `gatech.service-now.com/financials?id=sc_cat_item&sys_id=51832479db39b740fc9efe8d0f96191f&sysparm_category=078ccdf8db7be700391b9837db9619af`. The main content area displays a knowledge article titled "Custodial Fund Agreement - Docusign Instructional Form". The article text states: "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...". Below the text, there are two links: "Custodial Fund Agreement" and "Custodial Entity - Inactivate/Reactivate existing" (with an "Order" button). Further down, there is another link: "Custodial Entity - Request new" (with an "Order" button). At the bottom right of the main content area, there is a red-bordered box containing a paperclip icon and the text "Add attachments". To the right of the main content area, there is a large red-bordered box containing a gold button labeled "SUBMIT". The footer of the page includes social media icons, "System Status", "OIT Main Site", "Campus Map", "Support/Give", "Accessibility", and the text "CREATING THE NEXT®".

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 sor reactivation of an existing Custodial Entity

Custodial Entity - Request new [Order](#)

Request a new Custodial Entity

[Add attachments](#)

SUBMIT

[f](#) [i](#) [t](#) [v](#) [t](#) [t](#)

System Status

OIT Main Site

Campus Map

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 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 [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

<u>Type of Insurance</u>	<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 [website](#).

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 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 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 Food & Group Meal Form 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!

