REVISED CHECKLIST
EFFECTIVE APRIL 2014

Proposed non-competitive contracts with a term of more than one year or which contain a provision to allow for extension by either party that would extend the contract beyond 12 months and which have a cumulative value of not less than $250,000, including all possible extensions; and

Any amendment to a contract (meeting the $250,000 and over one year threshold) must be presented to the Fiscal Review Committee (FRC), 60 days prior to the proposed effective date, if it meets any of the following conditions:

➢ increases or decreases the maximum liability;
➢ extends or shortens the original term of the contract;
➢ changes the entity or name of the entity with which the state is contracting; or
➢ otherwise changes an original contract or amended contract in a substantive manner.

If a department or agency is unsure if a contract or amendment meets the criteria of the FRC and should be submitted for review and commit, please contact the FRC staff for a determination.

Use the following checklist to ensure copies of the proper documentation has been submitted to the FRC staff:

☐ SUMMARY LETTER
   ➢ Detailing terms of contract or amendment and detailed justification of why the goods or services should be acquired through non-competitive negotiation.
   ➢ If request is submitted less than 60 days before effective date, a detailed explanation for why the request is late. PLEASE NOTE: LATE SUBMISSIONS WILL BE ROLLED FOR ONE COMMITTEE MEETING AND PLACED LAST ON THE AGENDA.

☐ SUPPLEMENTAL DOCUMENTATION FORM – Form must be completely filled out with back-up documentation from Edison of total expenditures on the date submitted. No requests will be placed on the agenda if this form is not complete.

☐ APPROVED RULE EXCEPTION REQUESTS (if appropriate)
REvised checklist
effective april 2014

☐ approved office for information resources (oir), ehealth, or human resources pre-approval endorsement requests (if appropriate)

☐ special contract request

☐ summary sheet for contract (original or proposed)

☐ any revised summary sheets

☐ original contract
  ➢ if new non-competitive contract, actual language of the proposed contract (can be in draft form if necessary).

☐ summary sheet for each prior amendment

☐ all prior executed amendments

☐ request form and summary sheet for proposed amendment
  ➢ if new amendment, actual language of the proposed amendment (can be in draft form if necessary).

☐ copy of performance bond if required in the contract (if performance bond must be renewed each year, a copy of the renewal)

☐ any additional supporting documents

☐ fully executed copy of final document immediately upon receipt by the department

FRC STAFF COMMITTEE CONTACT INFORMATION:

Leni Chick, Contract & Audit Coordinator
8th Floor, Rachel Jackson Building
(615) 253-2048 (direct)
(615) 741-2564 (main line for FRC)
(E-mail address: leni.chick@capitol.tn.gov

http://www.capitol.tn.gov/joint/committees/fiscal-review

2