PROCEDURE

Required Training

To be a contract manager for ICSEW you must take the following courses:

- WA-State Purchasing & Procurement Ethics
- WA-State Contract Management 101 (4 Modules)
- WA-State Contract Management 102 (3 Modules)
- WA-State Contract Management 401 (7 Modules)
- WA State Supplier Diversity

Contract Manager Roles and Duties

The Executive Chair must take training courses and act as the primary Contract Manager. The Executive Chair will ensure ICSEW has at least two additional board members who will take the training and be designated contract managers.

The primary or designated Contract Manager and the OFM Contract Specialist shall review the final contract. The primary or designated contract manager shall approve all invoices and contracts and is responsible for monitoring the performance of the contract.

If you are not a trained contract manager, you can complete Contract Processing steps 1-4 listed below, but you must obtain assistance from the primary or designated Contract Manager to complete the process.

Once service is rendered, the contractor will send an invoice. Only the primary or designated Contract Manager can approve invoices for payment of the contractor's services.

A contract log shall be maintained by the Treasurer for each contract. The primary or designated contract manager will input each contract into the contract log.

Contract Processing:

1. Start the contracting process at least 6-8 weeks in advance of the deadline/event.
2. Determine the need for a contract, using a statewide vendor as the first option.
    a. If a statewide vendor does not meet the need or is not applicable, then skip this step.
3. Verify funding has been approved via the current budget.
4. Connect with the speaker/vendor/musicians etc. to determine when (time/date) the work will be performed.
    a. If available, have speaker/vendor/musicians etc. submit their own version of a contract/proposal with pricing and statement; however, it is preferred to use the state contract.
    b. Send the following questions to the speaker/vendor/musicians for an answer within ICSEW for Contract Work Request.
        i. Task that will be completed for ICSEW?
        ii. Virtual presentation or in-person event speaker or activity?
        iii. Legal Name of vendor, address and phone number?
        iv. Vendor's signer name and email?
        v. Vendor's contact if different than signer?
        vi. If a speaker, has the person retired from Washington state employment?
        vii. Dollar amount?
        viii. Is the vendor licensed to do business in the State of Washington?
        ix. Has the vendor registered as a statewide vendor?
        x. Presentation title (if applicable)?
        xi. Date/time?
        xii. If presentation is a speaker, will they be distributing material?
        xiii. Will ICSEW be recording and a video/photo release needed? If so, OFM will draft and send a video release.
        xiv. Is the vendor a certified OMWBE or certified Washington Department of Veterans Affairs (WDVA) business? If not, why did you not choose a certified business?
5. Contract Manager sends the contract request and proposal to the Contract Specialist at OFM.
6. Contract Manager works with the Contract Specialist at OFM to create first draft for internal review (Items are cleaned and cleared up).
7. Once the contract is approved by the Contract Manager, it will be sent to the

speaker/vendor/musician to review and approve.
   a. Highlight: Payment, Scope of Work, Vendor ID number.
   b. If changes needed, return to Step 4.
      i. Biggest changes to the contract are scope of work, timeline, payment structure.
8. Once both sides approve, a digital DocuSign will be sent out by the Contract Specialist at OFM.
9. Once the work is completed, the contractor needs to send an invoice to the Contract Manager for payment.
10. Contract Manager verifies invoice is correct and forwards invoice with approval to OFMAccountsPayable@ofm.wa.gov and to the ICSEW Treasurer.

Vendor payee registration Form

It typically takes 3-5 business days to process a completed registration form. Do not submit duplicates as that increases processing time.

RELEVANT LAWS/RESOURCES

- RCW 39.26 – Procurement of Goods and Services
- State Administrative and Accounting Manual (SAAM)
- RCW 42.52 – Ethics in Public Service Act
- Vendor payee registration information: https://ofm.wa.gov/it-systems/accounting-systems/statewide-vendorpayee-services/vendor-payee-registration
- Registering as a business in Washington: https://www.sos.wa.gov/corporations-charities/frequently-asked-questions-faqs/faq-how-start-business#STEP-1-Determine-Registration-Requirement