

## 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)

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- 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:**

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