

Designer Initial Agreement

Initial Agreement

Project Manager

- 1) Informs Designer of being selected by SBC
- 2) Emails Designer Agreement Information Form
- 3) Emails Pre-Design Conference Outline and Handout
- 4) Attach information package
 - · Contract checklist
 - · SBC-1
 - · Program statement document Project master schedule
 - · Example SBC-7
 - · Designer fee attachment

Designer

- 1) Fills out **Designer Agreement Information** and sends back to **Project Manager**
- 2) Reviews other information

Project Manager

- 1) Receives and reviews **Designer Agreement Form** from **Designer**
- Updates out world in PITS as needed inputs contract data in PITS
- 3) Prepares Designer Agreement (SBC-6)
- 4) Completes Designer Agreement Checklist
- 5) Approval of **Director**

Property and Contract Manager

- · Transmits Designer Agreement and Instructions
- · Enters offered date in PITS

Designer

- 1) Reviews and signs counterparts
- 2) Sends to Property and Contract Manager:
- · 2 Signed counterparts
- · ACH- vendor.maint@tn.gov
- · W-9
- · Certificate of Insurance

Property and Contract Manager

- 1) Receives counterparts & attachments
- 2) Checks for errors and omissions
- 3) Enters received date in to PITS
- 4) Creates Routing Memo
- 5) Adds SBC-1 form
- 6) Routing Memo, and 2 counterparts, to Project Manager

Project Manager

- Reviews to ensure documents are complete and correct
- 2) Completes Designer Agreement Checklist
- 3) Logs OK date into PITS
- 4) Initials Routing Memo
- 5) Takes agreement to **Director of Project Management** for review and obtains initials on routing memo

SPA

- Reviews for compliance w/ statutes, policies, and contracting procedures
- 2) SPA adds Signature to Contract
- 3) Initials Routing memo and forwards

Property and Contract Manager

- 1) Duplicates 1 co'part of Agreement and emails to state Architect
- 2) Routes remaining 2 co'parts to OBF

State Architect

- 1) Signs 1 counterpart
- 2) Send to Property and Contract Manager

Finance

- 1) Verifies Funds
- 2) Obtains CFO signature
- 3) Initials Routing Memo & forwards

University Counsel

- 1) Reviews for form and legality
- 2) Obtains Counsel signature
- 3) Initials Routing Memo & forwards

President

- 1) Review documents
- 2) Signs
- 3) Initials Routing memo

Property and Contract Manager

- 1) Issues Purchase Order
- Receives the ETSU counterpart plus the 1 signed by State Architect
- Checks counterparts for signatures and add date matching **President** 's signature to first line of Agreement and to routing memo
- 4) Inserts State Architect signature page into counterparts
- 5) Scan and uploads into PITS
- Enter contract date into PITS matching President 's signature
- 7) Distributes counterparts

