

PTE/Contracts Workflow

All contracts begin with the Permission to Enter (PTE) process. Below is a step-by-step outline:

What is Permission to Enter?



- The Permission to Enter (PTE) process is required for any services provided with district or grant funds over \$5,000.
- A contract is required for services over \$25,000

Why Do We Need to Enter into a Contract?

- To ensure sound business practices by hiring appropriate vendors fairly and transparently.
- To demonstrate compliance with the City of Lowell and the State of Massachusetts guidelines.

When can I start the Process?

- The process may begin once plans are finalized and there is reasonable confidence that funding is secured, even if account numbers are not yet available.

Step 1: Complete the Required Documents for a PTE Request

You will need:

1. **Contract Request Form** filled out with a signature from an Assistant Superintendent.
2. **Scope of Services** - details of the services to be purchased
3. **Proof of Three Quotes (for contracts over \$10,000)**
 - Email three vendors, attaching the Scope of Services, and request a response within one week. Save the responses as electronic records.

Additional Information:

- Professional Development (PD) for Staff: No quotes are required for PD; however, you must still follow the PTE process.
- Services for students on IEPs are exempt and do not require three quotes.
- Consulting is not exempt from the quote process.
- Vendor Verification: For all contracts exceeding \$25,000, use this link to verify if the selected vendor is registered with the [MA Secretary of State](#).
- If the vendor is on a Massachusetts state contract, three quotes are still required to open a purchase order.
- If the vendor is specifically named by the grantor, you will not need quotes. Attach a copy of the grant to your PTE request.
- A completed [W9 form](#) is required for any new vendor.
- Vendors who are doing work in schools may require Worker's Compensation coverage.

Step 2: Submit Documentation to the Business Office

Submission Instructions:

Once all required documents are complete, please submit your full packet to Karen Laganas in the Business Office. Your packet must include:

- Contract Request Form
- Scope of Services
- Proof of Quotes or Grant Documentation
- Funding Source (include account numbers, if available, and dates of service)

Deadline:

Packets must be delivered to the Business Office by the close of business on the Wednesday of the week prior to the School Committee meeting to be placed on the agenda.

Step 3: Contract Preparation & School Committee Approval

Submit the Permission to Enter (PTE) request to the School Committee for approval. Once approved by School Committee, Karen Laganas will prepare the contract and assist with moving it through the contract process.

Generally, no services should begin until a contract is fully executed, with the exception of Mandated Services.



Important Notes

- **Processing Time:** The contract process can take up to two months or longer. For example, the PTE/contract process for services needed in August should begin in May. As soon as you know, contact the business office – we will facilitate the PTE process, and identify funding sources.
- **Complete Documentation:** Ensure that all paperwork is complete to avoid delays.
- **Funding Source:** Although the PTE process can begin before a final funding award is made, no contract or purchase order will proceed without a verified funding source.

Questions? Karen Laganas
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