Title: Consulting Coordination Math/Science	SOP #:
Author: Cheryl Tobey and Hannah Lakin	Origin Date: 7/2025 Version Date:

Purpose: Define operating procedures for shepherding partnerships from the inquiry, contracting, and delivery stages.

Materials/Tools:
- Consulting Contracts Coordination Interface, Full Airtable Base
- Video tour of process

Terms:
- **Partner:** District, School, or Organization requesting support services
- **Partner Contact**: The point person at a District, School, or Organization to communicate with throughout the partnership
- **Discipline PM**: The consulting project manager for a specific content area
  - As of June 2025: Math = Cheryl, Science = Maranda, Afterschool = Emma, Research/Eval = Alex (Update here)
- **Contract Coordinator**: The person who will be the main MMSA contact for districts. This is sometimes the primary facilitator, but for Per Diem consultants, someone else will often coordinate their contracts, while they act only as the primary facilitator.
- **Primary Facilitator**: The person who will be facilitating the PL, TA, or Coaching with a district
- **Secondary Facilitator** (if applicable): A person supporting the primary facilitator
- **Tertiary Facilitator** (if applicable): Another person supporting the primary facilitator

Process:

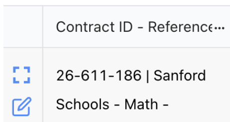
Contract Coordination Step	Data Input	Data Output
1. **Potential partner makes inquiry**	School Support Inquiry Form (Client submitted) INTERNAL School Support Inquiry Form (MMSA Staff submitted)	Form populates new record in Airtable CON PM for the specified content area will be notified via automated email of the new inquiry Status will default to *Inquiry* An Inquiry Notes document is automatically created
2. **CON PM makes contract**	In the Coordination Interface,	Contract Coordinator will

assignments	assign staff to the following fields: ● *Contract Coordinator* ● *Primary Facilitator* ● *Secondary Facilitator* (if applicable) ● *Tertiary Facilitator* (if applicable)	be notified via automated email and will continue the rest of the coordination
3. Contract Coordinator develops Partnership Plan *Meet with potential partner to gather the information needed to complete the fields required for the creation of the partnership plan.*	Contract coordinator completes the fields in the Coordination Interface https://airtable.com/appO7cZzDkRveN5Vw/pagT2S9X4IFdC4dG0?tvR7y=recCAUgOsc3AsxOcs When complete, check off the checkbox in the field *Create Partnership Plan Now.* (NOTE: Only check the box once, as each time it is checked/unchecked it creates a new document) Click *View Partnership Plan* to open the new document. Add: ● Service details and dates ● Cost table (paste from this document)	A customized Partnership Plan document is automatically created in Google Docs (folder) which the contract coordinator reviews/revises before sending to the partner for comment. Status will automatically change to *Developing Partnership Plan*
4. Contract Coordinator develops Contract	Contract coordinator makes any changes to the partnership fields and adds a Sign Off Contact in the Coordination Interface When complete, check off the checkbox in the *Create Contract* field.	A customized Contract document is automatically created in Google Docs (folder) which the contract coordinator reviews/revises before manually emailing to the Finance Assistant to upload to RightSignature.
5. Finance Assistant collects signatures	Finance Assistant sends Contract to *Sign Off Contact* and MMSA Executive Director. Once complete, the Finance Assistant uploads the PDF to the *Signed Contract* field and to Google Drive.	
6. HR Manager adds contract		One week before the

to the payroll system		ContractStartDate, the contract status will shift to active, and the HR Manager will be notified to add the contract to the payroll system. Two weeks after the ContractEndDate, the Contract Status will shift to Completed, and the HR Manager will be notified to remove the contract from the payroll system.

Note: If a staff member is missing from the Consultant options, an airtable lead will need to add a CON project (e.g. MCON, SCON) to their Project field in the MMSA All Staff airtable base.

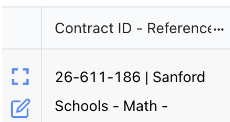
1. **Stage 1: Inquiries and Partnership Plan Development**
    a. Phase 1: Inquiries and Staff Assignment
        i. Website or Marketing-Initiated Inquiries
        When an inquiry is submitted through the website or via a marketing channel (e.g., email campaign, newsletter, or social media post), the Discipline Project Manager (PM) is notified. The PM then assigns a CON team member to follow up with the contact.
        ii. Direct Staff Contact
        When a potential partner reaches out directly to a CON staff member, the staff member is responsible for entering the inquiry into the system using the "Internal Add Inquiry" form located under the Forms section in the Airtable or using this direct link.
    b. Phase 2: Partnership Plan Development
    Once assigned to the primary MMSA contact, the Inquiry automatically moves to the Under Development phase in the Con Portal.
    The primary MMSA contact:
        i. Meets with potential partner to gather the information needed to complete the fields required for the creation of the partnership plan.
        ii. Enter the required information into the Portal.
            1. All contracts in the developing stage can be seen by the Primary by clicking on the "Developing" tab and entering an email.
            2. Click on the edit icon of the partner/client



            3. Complete the Information Fields
                a. Format, Start and End Date, Facilitator information, Potential Services and Other Costs, Designated Signee/Payment Terms, Calculate Cost (do not click create contract yet).
                b. When ready, scroll to the top of the input window and select "Create Partnership Plan" (Plan Template)
                c. Scroll to the Bottom of the input window to Save.
            4. Finalize the plan by creating the cost table and add in the information to the partnership plan.

        iii. Send the draft Partnership Plan to the partner for review. [CT note add more here]
        iv. Create a Partner folder in xxxxx, add a shortcut to the partnership plan

2. **Stage 2 - Contracting [move to this SOP?]**
    a. Once the partnership plan is approved, return to the Con Portal to edit the Partnerhip entry.



    b. Make changes as needed, recalculate and save.
    c. Click create contract

Build the final contract

Ready to build final contract?

☐

Review the contract, make changes as needed.

d. Send the link to the contract to finance@mmsa.org to request signatures through Right Signature.

3. **Stage 3 - Delivery [see xxx SOP, add link]**
   SOP includes information on delivering services, timesheet, and expenses.

Revision History:

Date	Description of Changes	Name