



**Housing Authority of New Orleans
(HANO)**

**Department of Procurement and Contracts
Procedures Manual**

Procurement Procedures

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1. Introduction

The Procurement and Contracts Procedures Manual (“Procurement Procedures”) is intended as a reference guide to provide Managing and User Departments and HANO staff with operational procedures to implement the policies described in the Procurement Policy. Procurement procedures adopted administratively by the Contracting Officer or his/her designee shall be based on, and must also comply with all applicable laws and regulations.

1.1 Approval of Procedures

Delegation of Approval Authority: In adopting the Procurement Policies, the Board of Commissioners authorizes the Executive Director or his/her designee to approve and implement appropriate Procurement Procedures that are consistent with Procurement Policies. The Board shall hold the Executive Director responsible for ensuring the appropriateness of any Procurement Procedures adopted. The Procurement Procedures may be amended at any time at the discretion of the Executive Director, and do not require the approval of the Board of Commissioners.

Procedural Modifications: At a minimum, HANO’s Procurement Policies and Procedures should be reviewed and necessary updates made on an annual basis. This review should be concurrent with HANO’s annual review of its expenditure authority. Procedural changes that are made periodically throughout the year should be added as approved amendments to the Procurement Procedures and incorporated into the appropriate section(s) of the Procedure document during the year-end review.

Procedural changes should be made by the Director of Procurement and Contracts and tracked in the Change Log attached to the Procedures Manual.

Transition to New Procedures: The procurement procedures included within the Procurement Policies, adopted by the Board of Commissioners on **August 17, 2010**, shall remain in effect unless in conflict with, or superseded by, either Procurement Policies or new procurement procedures as may be administratively approved by the Executive Director or his/her designee from time to time.

2. Procurement Methods

This section describes the criteria for selection of the appropriate procurement method to be employed for each procurement action. The procurement method selected shall be based on the scope and anticipated dollar value of the total requirement. Regardless of the procurement method used, all procurement requests should be initiated by the Requesting Department by entering a purchase requisition into the procurement system and attaching appropriate backup documentation. The purchase request shall, at a minimum include, a description of the items requested and an estimated cost within the approved budget. Once the purchase requisition is approved the appropriate procurement method is selected.



2.1 Small Purchases (under \$100,000)

2.1.1 Micro-Purchases - Small Purchases of \$2,000 or Less

The following process is used to select a vendor and evaluate a quote for micro-purchases:

Responsible Party	Process Step
Requesting Dept.	1. Prepares and enters a purchase requisition for \$2,000 or less into procurement system. Attaches support documentation.
Dept. of Procurement and Contracts	2. Receives an approved purchase requisition for goods or services.
Dept. of Procurement and Contracts (or Requesting Dept.)	3. The Requesting Department or the Department of Procurement and Contracts shall identify a vendor and request a written quote for all micro-purchases. a. If the requesting department has not suggested a vendor and obtained a vendor quote for the request, the Department of Procurement and Contracts will contact a vendor for a quote. b. If the Requesting Department has contacted a vendor and obtained a quote, the Department of Procurement and Contracts will review the provided vendor information and quote to ensure the following: (1) the vendor is a HANO registered vendor and (2) the quote appears to be fair and reasonable. If the above two criteria are met, the Department of Procurement and Contracts will proceed by authoring a purchase order. If the vendor is not registered, Procurement and Contracts will register and enter the vendor.
Dept. of Procurement and Contracts	4. Creates a purchase order.
Dept. of Procurement and Contracts	5. Obtains approval from the Director of Procurement and Contracts for the purchase order.
Dept. of Procurement and Contracts	6. Issues the purchase order to the vendor.

2.1.2 Small Purchases of more than \$2,000 and less than \$30,000

The following process is used to review bids and evaluate price reasonableness for small purchases over \$2,000 and less than \$30,000:

Responsible Party	Process Step
Requesting Dept.	1. Identifies the need, develops a statement of work and/or specifications, cost estimate and potential vendor list (if applicable).
Requesting Dept.	2. Prepares and enters a purchase requisition for more than \$2,000 and less than \$30,000 into procurement system. Attaches all support documentation.

Dept. of Procurement and Contracts	3. Receives an approved electronic purchase requisition for goods or services.
Dept. of Procurement and Contracts	4. Identifies a source list of at least three potential vendors and will submit the solicitation to each vendor for price quotes via fax or email.
	5. Written price quotes are received and reviewed to determine price reasonableness.
	6. Once price reasonableness is determined, the lowest, responsive, responsible bidder is selected.
Dept. of Procurement and Contracts	7. The electronic purchase file is created by attaching all quotation documents to the purchase request in the procurement system.
	8. If the winning bid is not selected based on price or other specified factors, the rationale will be documented in the file.
Dept. of Procurement and Contracts	9. Creates a purchase order.
Dept. of Procurement and Contracts	10. Obtains approval from the Director of Procurement and Contracts and Executive for the purchase order.
Dept. of Procurement and Contracts	11. Issues the purchase order to the vendor.

2.1.3 Small Purchases (IFB's) of more than \$30,000 and less than \$100,000 (Purchases of materials, equipment, and supplies that meet the definition of "Public Works")

The following process is used for small purchases greater than \$30,000 and less than \$100,000:

Responsible Party	Process Step
Requesting Dept.	1. Identifies the need, and develops a statement of work and/or specifications, cost estimate and potential vendor list.
Requesting Dept.	2. Prepares and enters a purchase requisition for over \$30,000 and less than \$100,000 into procurement system. Attaches all support documentation.
Dept. of Procurement and Contracts	3. Receives an approved electronic purchase requisition.
Dept. of Procurement and Contracts	4. Assigns a solicitation number.
Dept. of Procurement and Contracts	5. Prepares an advertisement and solicitation based on the requesting department's needs.

Dept. of Procurement and Contracts	6. Submits the advertisement to select publications at least 15 days before the opening of the bids. a. The first publication of the advertisement shall not occur on a Saturday, Sunday, or legal holiday. b. Plans and specifications shall be available to bidders on the day of the first advertisement and shall be available for twenty-four hours before the bid opening date.
Dept. of Procurement and Contracts	7. As bid responses are received from interested vendors, vendors are provided a receipt from HANO's Department of Procurement and Contracts denoting the time and date the response(s) were received. The bids are also time and date stamped. Received bids are stored in a secure location until the time of bid opening.
	8. Reviews the bids submitted by the Vendor and determines lowest, responsive, responsible bidder.
	9. The lowest, responsible, and responsive bid is forwarded to the requesting department to review.
Requesting Dept.	10. Requesting department reviews the lowest bid and determines price reasonableness.
	11. The requesting department drafts an award recommendation letter and verifies the recommended vendor's bid is reasonable.
Dept. of Procurement and Contracts	12. Obtains approval from the Executive Director or his/her designee. a. Drafts an award recommendation letter to Executive Director and attaches recommendation from Requesting Department and evidence of vendor responsibility.
Dept. of Procurement and Contracts	13. Drafts and routes contract for execution.
Dept. of Procurement and Contracts	14. Creates and issues purchase order and contract.
Dept. of Procurement and Contracts	15. Creates a procurement file for the purchase(s) including the following documentation: a. Purchase Requisition & Purchase Order b. Vendor selection documentation (e.g. vendor quotes, bids, vendor contact information, justification for vendor selection) c. Executed contract.

2.2 Competitive Bids (IFBs)

2.2.1 Preparation of IFBs

The following process is used for purchases greater than \$100,000:

Responsible Party	Process Step
Requesting Dept.	1. Identifies the need, and develops a statement of work/specifications and cost estimate.

Requesting Dept.	2. Prepares and enters a purchase requisition for over \$100,000 into procurement system. Attaches supporting documentation.
Dept. of Procurement and Contracts	3. Receives an approved electronic purchase requisition.
Dept. of Procurement and Contracts	4. Assigns a solicitation number.
Dept. of Procurement and Contracts	5. Compiles and reviews the solicitation including the statement of work, specifications, and directions on how to respond to the solicitation. a. The solicitation must specify the date, time, and location for both the place for receipt of bids and the place for the public bid opening. b. The solicitation must also state where complete specifications can be inspected or obtained by interested parties (if applicable).
Dept. of Procurement and Contracts	6. Prepares an advertisement.
Dept. of Procurement and Contracts	7. Submits the advertisement (or "Invitation for Bids") to select print and online publications at least 25 days in advance of the bid opening date (Saturday, Sunday, and legal holidays are excluded).
Dept. of Procurement and Contracts	8. Re-submits the Invitation for Bids to select print and online publications weekly for the three weeks preceding the published bid opening date.
Dept. of Procurement and Contracts	9. Specifications (if applicable) are made available for up to 24 hours prior to bid opening.
Dept. of Procurement and Contracts	10. As bid responses are received, bidders are provided a receipt from HANO's Department of Procurement and Contracts denoting the time and date the response(s) were received. The bids are also time and date stamped. Received bids are stored in a secure location until the time of bid opening.

2.2.2 Amendments to IFBs

The following process is used for amendments to all issued IFBs:

Responsible Party	Process Step
Dept. of Procurement and Contracts/Project Architect	1. Prepares and issues a written addendum to an existing and open IFB.
Dept. of Procurement and Contracts/Project Architect	2. Send copies of the addenda via mail and/or email to each prospective bidder who received the initial IFB package and/or post on HANO's website and Bid Express website.
Vendor	3. Acknowledges receipt of the addendum to the IFB.



2.2.3 Bid Opening and Award

The following process is used for the review and award of competitive bids:

Responsible Party	Process Step
Dept. of Procurement and Contracts	1. On the published bid opening date, each received bid is opened by the Department of Procurement and Contracts and read aloud in the presence of at least one witness at the time and place prescribed in the Invitation for Bids.
Dept. of Procurement and Contracts	2. Each bid is recorded in the abstract for the procurement, including the name and bid price for each bidder.
Dept. of Procurement and Contracts	3. All submitted bids are reviewed by the Director of Procurement and Contracts to ensure the responses meet the requirements described in the Invitation for Bids, as well as any noted specifications (if applicable).
Dept. of Procurement and Contracts	4. Once reviewed, the lowest, responsive, and responsible bidder is selected by the Director of Procurement and Contracts for bid recommendation. To be considered responsive, the Bidder must meet all requirements of the specification documents (if applicable).
Requesting Dept.	5. The recommended bid is reviewed and approved by the Requesting Department Director. a. If the bid is not approved by the Requesting Department, the bid is determined non-responsive and the next lowest bid is reviewed. b. The Requesting Department must formally document in writing its rationale for determining the recommended bid non-responsive. This documentation should be provided to the Department of Procurement and Contracts for inclusion in the procurement file.
Requesting Dept.	6. Drafts an award recommendation letter, verifying that the recommended vendor's bid is reasonable and sends to the Department of Procurement and Contracts.
Dept. of Procurement and Contracts	7. If the procurement is over \$100,000, obtains Board of Commissioner's approval for the procurement. a. Drafts a board resolution for approval and attaches recommendation from Requesting Department and evidence of vendor responsibility.
Dept. of Procurement and Contracts	8. Creates purchase order and contract.
Dept. of Procurement and Contracts	9. Routes contract for execution.
Dept. of Procurement and Contracts	10. Distributes purchase order and contract.

Dept. of Procurement and Contracts	11. Sends denial letter to Vendor(s) not selected for contract award.
Dept. of Procurement and Contracts	12. Creates a procurement file for the purchase(s) including the following documentation: a. Purchase Requisition & Purchase Order b. Vendor selection documentation (e.g. vendor quote(s), bids, bid abstract, vendor contact info., justification for selection). c. Award notification letter d. Denial letters e. Approved board resolution f. Executed contract.

2.2.4 Mistakes in Bids

The following process is used for the withdrawal or correction of submitted bids prior to the bid opening date:

Responsible Party	Process Step
Bidder	1. Wishes to withdraw or make corrections to a bid prior to bid opening.
Bidder	2. Contacts the Department of Procurement and Contracts via letter, email, or fax expressing desire to correct or withdraw a previously submitted bid. The written communication should include the solicitation number and rationale for withdrawal (or correction).
Dept. of Procurement and Contracts	3. Reviews the rationale for withdrawal (or correction) and if approved, returns the previously submitted, sealed bid to the Bidder. a. If the Bidder corrects a previously submitted bid, the original bid will be discarded by the Director of Procurement and Contracts once the corrected bid is received.
Dept. of Procurement and Contracts	4. The Director of Procurement and Contracts must provide written and signed determination of all decisions to allow correction or withdrawal of bid mistakes within the procurement file.

The following process is used for the withdrawal of submitted bids after the bid opening date:

Responsible Party	Process Step
Bidder	1. Wishes to withdraw a bid within 48 hours of bid opening (excluding Saturday, Sunday, and legal holidays).

Bidder	2. Contacts the Department of Procurement and Contracts via letter, email, or fax expressing desire withdraw a previously submitted bid. The written communication should include the solicitation number, as well as clear and convincing sworn, written evidence of bidding error (e.g., blatantly obvious, unintentional, and substantial mechanical, clerical, or mathematical errors or errors of unintentional omission of a substantial quantity of work, labor, material, or services made directly in compilation of the bid).
Dept. of Procurement and Contracts	3. Reviews the documentation requesting bid withdrawal. HANO must accept the withdrawal if it is determined that the bid error meets one or more of the standards explained in step 2, as opposed to an error in judgment, and that the bid was submitted in good faith.
Dept. of Procurement and Contracts	4. If withdrawal is accepted, the bid is securely returned to the bidder.
Dept. of Procurement and Contracts	5. The Director of Procurement and Contracts must provide written and signed determination of all decisions to allow withdrawal of bid mistakes within the procurement file.

2.3 Requests for Proposals

The following process is used for the development of solicitation materials for Requests for Proposals (RFPs):

Responsible Party	Process Step
Requesting Dept.	1. Identifies the need, and develops a statement of work and/or specifications, cost estimate and potential vendor list.
Requesting Dept.	2. Prepares and enters a purchase requisition into procurement system. Attaches support documentation.
Dept. of Procurement and Contracts	3. Receives an approved electronic purchase requisition.
Dept. of Procurement and Contracts	4. Determines the appropriate method of procurement, e.g., RFP or Request for Qualifications (RFQ).
Dept. of Procurement and Contracts	5. Assigns a solicitation number.
Dept. of Procurement and Contracts	6. Prepares the solicitation.
Dept. of Procurement and Contracts	7. Prepares an advertisement, if applicable.

Dept. of Procurement and Contracts	8. When feasible, submits the advertisement to select print and online publications at least 25 days in advance of the bid opening date (Saturday, Sunday, and legal holidays are excluded). a. The Director of Procurement and Contracts may determine that a lesser period of advertisement is acceptable, but under no circumstance, can the first advertisement be fewer than 15 days prior to the proposal submission due date and time.
Dept. of Procurement and Contracts	9. Copies of the RFP are made available via HANO's website on the first day of the advertisement.
Dept. of Procurement and Contracts	10. Re-submits the advertisement to select print and online publications weekly for the three weeks preceding the published proposal due date.

2.3.1 Receipt and Handling of Proposals

Responsible Party	Process Step
Dept. of Procurement and Contracts	1. As proposals are received from interested Respondents, they are provided a receipt from HANO's Department of Procurement and Contracts denoting the time and date the response(s) were received.
Dept. of Procurement and Contracts	2. The proposals must also be time and date stamped and stored in a secure location until the published proposal submission due date and time. a. Proposals shall be handled so as to prevent disclosure of the number of offerors, identity of offerors, and the contents of their proposals.

2.3.2 Proposal Evaluation

The following process is used for the evaluation of proposal responses:

Responsible Party	Process Step
Requesting Dept.	1. Obtains approval of Proposal Evaluation Committee and provides to Department of Procurement and Contracts.
Dept. of Procurement and Contracts	2. After the published proposal submission due date and time, all received proposals are opened by the Department of Procurement and Contracts for distribution to the Proposal Evaluation Committee.
Dept. of Procurement and Contracts	3. The Department of Procurement and Contracts provides all proposal evaluation materials to each Committee member, e.g., technical and cost proposals, evaluation criteria.
Proposal Review Committee	4. The Committee meets to discuss and score proposals. A consensus score is established for each criteria of the proposal.

Proposal Review Committee	5. See section 2.3.3, Final Determination, for detailed procedures taken by the Proposal Review Committee if it is determined that additional information or best and final offers are necessary.
Proposal Review Committee Chairman	6. The Committee Chairperson drafts an Evaluation Report detailing the evaluation process, the Evaluation Committee's consensus scores, and the Committee's award recommendation.
Dept. of Procurement and Contracts	7. The Evaluation Report is documented in the procurement file.

2.3.3 Final Determination

The following process is used for the negotiation of contracts through the RFP process:

Responsible Party	Process Step
Proposal Review Committee	1. Determines that additional (or revised) information should be requested from all or shortlisted Respondents.
Dept. of Procurement and Contracts	2. Contacts shortlisted Respondents via phone, email, or letter requesting additional information, oral presentations, and/or Best and Final Offers. a. The communication must include detailed response requirements, as well as date, time, and location of receipt of responses.
Dept. of Procurement and Contracts	3. If applicable, schedules oral presentations for select Vendors and the Proposal Evaluation Committee. Schedules are provided to each member of the Committee.
Dept. of Procurement and Contracts	4. Provides additional documentation/Best and Final Offers to the Proposal Review Committee as it is received.
Proposal Review Committee	5. May repeat 2.3.2, steps 3-7 or enter into negotiations until final selection is made.

2.3.4 Award

The following process is used for the award of contracts by RFP:

Responsible Party	Process Step
Proposal Review Committee	1. Based on the Proposal Review Committee's Evaluation Report, an award recommendation letter is drafted and sent to the Department of Procurement and Contracts.

Dept. of Procurement and Contracts	<ol style="list-style-type: none"> 2. Obtains award approval. <ol style="list-style-type: none"> a. If the procurement is under \$100,000, obtains approval from the Executive Director or his/her designee. b. If the procurement is over \$100,000, obtains Board of Commissioner's approval for the procurement. b. Drafts an award recommendation letter or board resolution and attaches recommendation from Proposal Evaluation Committee and evidence of vendor responsibility.
Dept. of Procurement and Contracts	3. Creates purchase order and contract.
Dept. of Procurement and Contracts	4. Routes contract for execution.
Dept. of Procurement and Contracts	5. Issues purchase order and contract to Contractor.
Dept. of Procurement and Contracts	6. Distributes purchase order and contract internally.
Dept. of Procurement and Contracts	7. Sends contract award notification to unsuccessful bidders (for purchases over \$100,000).
Dept. of Procurement and Contracts	<ol style="list-style-type: none"> 8. Creates a procurement file for the purchase(s) including the following documentation: <ol style="list-style-type: none"> a. Purchase Requisition & Purchase Order b. Vendor selection documentation (e.g. vendor proposals, vendor contact info, evaluation report justification for selection, negotiation documents). c. Award notification letter d. Denial letters e. Approved board resolution f. Executed contract.

2.4 Cooperative Purchasing

The following process is used for the State, General Service Administration (GSA), Inter-governmental, Inter-agency and/or other cooperative purchase agreements:

Responsible Party	Process Step
Requesting Dept.	1. Identifies the need, and develops a statement of work and/or specifications, cost estimate and potential vendor list or cooperative contract info.
Requesting Dept.	2. Prepares and enters a purchase requisition into procurement system. Attaches support documentation.
Dept. of Procurement and Contracts	3. Receives an approved electronic purchase requisition for goods or services that may be acquired through an existing State, GSA, Inter-governmental, and/or other cooperative purchase agreement.

Dept. of Procurement and Contracts	4. Once the cooperative contract price(s) have been verified, purchase orders can be created to procure the goods/services through the contracted vendors.
Dept. of Procurement and Contracts	5. Obtains proper approval of the purchase order based on dollar amount. a. If the total procurement is less than \$2,000, the Director of Procurement and Contracts will approve the PO. b. If the total procurement is greater than or equal to \$2,000 the Executive Director or his/her designee must approve the PO.
Dept. of Procurement and Contracts	6. If the contract is over \$100,000, obtains Board of Commissioner's approval for the procurement.
Dept. of Procurement and Contracts	7. Creates a procurement file for the purchase(s) including the following documentation: a. Purchase Requisition b. Vendor selection documentation (e.g. cooperative contract information, vendor quote(s), bids, and/or proposals, vendor contact information).

2.5 Emergency Procurements

Emergency procurement is defined as any purchase that is necessary when there exists a situation that seriously threatens the public health, welfare, or safety, or endangers property, or would otherwise cause serious injury to HANO, as may arise by reason of a hurricane, flood, earthquake, epidemic, riot, equipment failure, or similar event.

In the event that an emergency procurement is necessary, the non-competitive procurement method may be utilized if it is determined that contract award is not feasible using small purchase procedures, sealed bids or competitive proposals. In such cases, there must be an immediate and serious need for supplies, services, or construction and the emergency procurement is limited to those supplies, services, or construction necessary simply to mitigate the emergency.

The following process is used for emergency procurements:

Responsible Party	Process Step
Requesting Dept.	1. Identifies the Department's needs as an emergency per the definition of an emergency.
Requesting Dept.	2. Drafts an "Emergency Procurement Memo" authorizing the purchase(s), signed by the Department Director as well as the Purchase Authorizer. The Purchase Authorizer will be the Executive Director or his/her designee. a. The memo must include a description of goods/services needed and an explanation of situation that presents the emergency. b. The memo may be forwarded and approved via email.
Requesting Dept.	3. Authorized person creates and enters a purchase requisition in the procurement system.



Dept. of Procurement and Contracts	4. Selects a vendor or obtains quotes for goods and/or services.
Dept. of Procurement and Contracts	5. Creates and issues a purchase order.
Dept. of Procurement and Contracts	6. Obtains proper approval of the purchase order based on dollar amount.
Dept. of Procurement and Contracts	7. If the contract is over \$100,000, obtains Board of Commissioner's approval for the procurement.
Dept. of Procurement and Contracts	8. Creates a procurement file for the purchase(s) including the following documentation: a. "Emergency Procurement Memo" b. Vendor selection documentation (e.g. vendor quote(s), bids, and/or proposals, vendor contact information, justification for vendor selection) c. Purchase Order d. Contract (if applicable).

3. Vendor Management

3.1 Vendor Data Maintenance

3.1.1 Vendor Setup (Procurement Vendor)

The following process is used to validate and setup a new Procurement Vendor in HANO's Vendor Database:

Responsible Party	Process Step
Vendor	1. A Vendor is awarded a procurement.
Dept. of Procurement and Contracts	2. Performs a search within the Vendor Database to ensure a Vendor record does not already exist.
Dept. of Procurement and Contracts	3. A Vendor Setup Form is provided to the Vendor to complete. a. Vendor Setup Forms can also be included in Invitation for Bids, Request for Proposals, Request for Qualifications, and Request for Quotes packets.
Vendor	4. Vendor completes the Vendor Setup Form and returns the form with submitted documentation to the Department of Procurement and Contracts.
Dept. of Procurement and Contracts/Finance	5. Completed Vendor Setup Form is reviewed for completeness. a. If the Vendor Registration Form is determined to be incomplete, the Vendor will be notified and the Vendor will be required to revise and resubmit the Form.
Dept. of Procurement and Contracts	6. Once it has been confirmed that the Vendor is a legitimate vendor, the Vendor is approved as a new vendor.
Dept. of Procurement and Contracts	7. Creates a new Vendor record.



3.1.2 Vendor Setup (Non-Procurement Vendor)

The following process is used to validate and set-up a new Non-Procurement Vendor in HANO's Vendor Database:

Responsible Party	Process Step
User Department/Finance	1. Determines that a Non-Procurement Vendor is due payment from HANO. Non-Procurement Vendors include: residents to whom relocation checks are due, employees to whom reimbursements are due, parties to legal settlements, governmental, city or other regulatory entities, etc.
User Department/Finance	2. Completes and submits a Non-Procurement Vendor Setup Form.
Dept. of Procurement and Contracts	3. Completed Vendor Setup Form is reviewed for completeness. a. If the Vendor Setup Form is determined to be incomplete, the User Department or Finance will be notified and will be required to complete and resubmit the Form.
Dept. of Procurement and Contracts	4. Performs a search within the Vendor Database to ensure a Vendor record does not already exist.
Dept. of Procurement and Contracts	5. Creates a new Vendor record.

4. Purchase Requests

The following reflect the procedures to be used by the User Department for the development and approval of a purchase requisition.

Responsible Party	Process Step
Requesting Dept.	1. Determine the Department's needs.
Requesting Dept.	2. Authorized user creates a purchase requisition within the procurement system and attaches any support documentation, as appropriate.
Department Director	3. Routed to Department Director (if not originator) for approval within the system. Department Director approves the requisition in the system.
Finance Dept.	4. Routed to Finance Department for approval within the system. Finance Department approves the requisition in the system.
Executive Department	5. The requisition is routed to Executive for approval. Executive approves the requisition in the system.



5. Purchase Orders and Contract Development

5.1 Purchase Orders

The following reflect the procedures to be used by the Department of Procurement and Contracts for the development of a purchase order:

Responsible Party	Process Step
Dept. of Procurement and Contracts	1. Reviews approved procurement requisition queue and identifies approved purchase requisitions that require purchase order(s).
Dept. of Procurement and Contracts	2. Reviews all approved purchase requisition to identify opportunities to combine two or more purchase requests into one purchase order.
Dept. of Procurement and Contracts	3. Reviews all approved purchase requisition to identify opportunities to use cooperative agreements.
Dept. of Procurement and Contracts	4. The Department of Procurement and Contracts will review each purchase request for complete and accurate information. Any purchase requisition prepared incorrectly will be returned to the Managing Department, requesting that corrections be made. No action will be taken on the purchase requisition until all errors and/or omissions are corrected and the Department of Procurement and Contracts is in receipt of the corrected and fully approved purchase requisition in electronic format.
Dept. of Procurement and Contracts	5. Conducts appropriate procurement in accordance with procedures in Section 2, Procurement Methods.
Dept. of Procurement and Contracts	6. Create purchase order within the system.
Dept. of Procurement and Contracts	7. Obtains proper approval of the purchase order based on dollar amount. a. If the total procurement is less than \$2,000, the Director of Procurement and Contracts will approve the PO. b. If the total procurement is greater than or equal to \$2,000 the Executive Director or his/her designee must approve the PO.
Dept. of Procurement and Contracts	8. Attaches documentation of procurement to electronic purchase requisition and/or creates procurement file including, at a minimum, the following documentation: a. Purchase Requisition & Purchase Order b. Vendor selection documentation (e.g. vendor quote(s), bids, and/or proposals, vendor contact information, justification for vendor selection).



5.2 Contract Development

The following processes reflect the procedures to be used by the Department of Procurement and Contracts and HANO's General Counsel for entering into a contract on behalf of HANO:

Responsible Party	Process Step
Dept. of Procurement and Contracts	1. Drafts contract based on type, e.g., construction, non-construction, maintenance, etc.
General Counsel	2. Reviews draft contract and provides any feedback or edits to the Director of Procurement and Contracts.
Dept. of Procurement and Contracts	3. Updates the draft contract as necessary and forwards the contract to the Vendor for review and approval.
Vendor	4. Reviews the contract and provides feedback to begin contract negotiations or agrees to the terms and conditions by signing the contract.
Dept. of Procurement and Contracts	5. If the Vendor has provided feedback or questions on the draft contract, the Director of Procurement and Contracts will communicate the information to the General Counsel for review.
General Counsel	6. Reviews the Vendor's feedback and determines if modifications to the draft contract should be permitted and are agreeable to HANO.
General Counsel	7. Communicates any approved changes to the Director of Procurement and Contracts to update the draft contract. <u>Note:</u> The General Counsel reserves the right to refuse any and all contract negotiations with potential Vendors. In addition, per the HUD Procurement Handbook and depending on dollar amount, HANO may not adjust or modify contract language for specific mandatory clauses in construction, non-construction, and maintenance contracts.
Dept. of Procurement and Contracts	8. Updates the contract draft as necessary and communicates any and all changes to the Vendor.
Vendor	9. Reviews the updated draft (if applicable) and determines if further negotiations are necessary and/or if the Vendor wants to continue the contract execution process with HANO, depending on their satisfaction with the contract negotiation process.
Dept. of Procurement and Contracts	10. Finalizes the contract based on all negotiation conversations and contract updates between HANO's General Counsel and the Vendor.
General Counsel	11. Reviews the final contract.
Dept. of Procurement and Contracts	12. Drafts Contracting Officer's Designee Letter to assign a Contract Monitor (CM).
Executive Director	13. Signs and executes the contract and the Contracting Officer's Designee Letter on behalf of HANO.



5.3 Disputes, Protests, and Appeals

5.3.1 Protest and Appeals Review

The following procedures should be used to review a submitted protest:

Responsible Party	Process Step
Dept. of Procurement and Contracts	1. Receive a properly filed protest.
Dept. of Procurement and Contracts	2. Review, investigate, and consult with HANO's General Counsel, as appropriate.
Dept. of Procurement and Contracts	3. Within 15 business days of receipt of protest, issue, in writing, a decision to the Protestor.

The following procedures should be used to appeal a protest decision:

Responsible Party	Process Step
Protestor	1. Within 3 business days of receipt of notification of the Director of Procurement and Contracts' decision on the original protest, the Protestor must notify HANO's Contracting Officer, in writing, of an appeal to the protest decision.
Contracting Officer	2. Review, investigate, and consult with HANO's General Counsel, as appropriate on the appeal.
Dept. of Procurement and Contracts	3. Within 15 business days of receipt of protest decision appeal, issue, in writing, a final decision to the Protestor.

6. Contract Administration

Contract administration begins immediately following an award of a contract/purchase order to determine how well HANO and the Vendor/Contractor have performed to meet the requirements of the contract. It encompasses all dealings from the onset of the contract until the goods/services have been received and accepted.

6.1 Contract Administrator

The Contract Administrator is responsible for:

- Developing and implementing procedures
- Providing technical assistance to Procurement and Contracts staff in preparation of solicitations and contract agreements
- Providing technical assistance and oversight to the Contract Monitor to ensure that contracts are being properly administered, monitored and Vendors/Contractors and Subcontractors are in compliance with the scope of work and contract terms and conditions
- Coordinating with the Contract Monitors, Vendor/Contractor and HANO staff to facilitate the resolution of contract disputes or claims
- Preparing all termination and performance evaluation notifications to Vendor/Contractor.

6.2 Contract Monitor

The Contract Monitor is responsible for:

- Monitoring the Vendor/Contractor performance, verifying they perform the technical requirements of the contract in accordance with the contract terms and conditions
- Reviewing, verifying and recommending approval of any invoice submitted for payment by the Vendor/Contractor in accordance with the contract terms and conditions
- Reporting any Vendor/Contractor deficiencies resulting in nonconforming work, delays or problems with the contract/purchase order on the Vendor/Contractor Complaint Form, recommending appropriate corrective action needed to correct the issue(s)
- Preparing all requests for contract modifications (change orders or amendments) and contract terminations.

6.3 Contract Administration

6.3.1 Prior to Procurement

The following procedures should be used prior to procurement:

Responsible Party	Process Step
User Department	1. Develop and submit to the Procurement and Contracts Department a detailed technical specification/scope of services identifying needs.
Contract Administrator and Contract Monitor	2. Identify contract risk and establish goals to manage risk.
Procurement and Contracts Department	3. Determine the appropriate procurement method.
Procurement and Contracts Department	4. Determine the appropriate contract type.

6.3.2 Post Award Activities

The following procedures should be used during post award activities

Responsible Party	Process Step
Contracting Officer	1. Executes Designation of Contract Monitor Letter, identifying the Contract Monitor for each contract.
Contract Administrator	2. Conduct Contract Post Award Meeting with Contract Monitor and distribute Designation of Contract Monitor Letter, Performance Monitoring Tools and Contract Administration File.

Contract Monitor	3. Request Vendor/Contractor to prepare questions prior to Contract Kick-off/Preconstruction meeting to address any concerns.
Contract Administrator and Contract Monitor	4. Conduct Contract Kick-off/Preconstruction Meeting to clarify goals, objectives and performance schedule.
Procurement and Contracts Department	5. Issue Notice to Proceed (NTP), if applicable.

6.3.3 Contract Monitoring

The following procedures should be used for handling contract problems or disputes in connection with the Vendor/Contractor performance:

Responsible Party	Process Step
Contract Monitor	1. Formally notifies Contract Administrator of problem or dispute on Vendor/Contractor Complaint Form.
Contract Administrator	2. Schedules Contractor Performance Evaluation meeting.
Contract Administrator	3. Issues a "Cure" Notice to the Vendor/Contractor, outlining performance issues and a time-line for corrective action.
Contract Administrator	4. Issues a Show Cause Notice prior to issuing a termination for default, unless problems or disputes have been corrected.
Contract Administrator	5. After the Cure Period, HANO may issue a notice of termination for default unless failure to perform has been cured.

6.3.4 Contract Closeout

The following procedures should be used for contract closeout activities:

Responsible Party	Process Step
Contract Monitor	1. Completes Contract Closeout Checklist, documenting completion of work, final acceptance of work and final payment has been made.
Contract Monitor	2. Completes Vendor/Contractor, Construction Contractor or Architectural/Engineering Performance Evaluation Form, depending on the type of Contract. (See Appendix D, E & F)
Contract Administrator	3. Perform Contract Administration Analysis to analyze and report on Contract Development and Contract Administration results.



APPENDIX



VENDOR SETUP FORM

Company Name: _____

Physical Address: _____

City: _____ State: _____ Zip: _____

Owner/President: _____

Remit To Address: _____

City: _____ State: _____ Zip: _____

Contact Name: _____

Contact Number: _____ Contact Fax: _____

Contact Email: _____ Company Website: _____

Banking Information (Required for EFT Payment):

Bank Name: _____ Name on Bank Account: _____

Routing Number:

Account Number:

Type of Account: Savings Corporate/Commercial

Required: Taxpayer Identification Number: _____

Type of Operation (Check all that apply):

Individual Corporation Manufacturer Partnership Distributor

Sole Proprietorship Retail Dealer Agent/Broker Limited Liability

Company.....

For HANO Use Only:

Finance Approval: _____ Date: _____ 1099? Y N

Procurement Approval: _____ Date: _____



Applicable Products/Services:

Indicate the products and/or services that you provide. Check all applicable boxes.

- Construction
- Construction Management
- Demolition
- Electrical Work
- Electrical Supplies
- Plumbing Work
- Plumbing Supplies
- Property Management
- Office Supplies
- Grass Cutting Services
- Technology Consulting
- Technology Supplies
- Human Resources
- Consulting
- Legal Services
- Brokerage Services
- Property Appraisals
- Messenger Services
- Janitorial Services
- Other, Please Describe:

Circle all that Apply: (DBE) (WBE) (MBE) (Section 3) (Small Business)

Required: (Attach a copy of your certification for all items circled above)

Check one: __ African American __ Hispanic __ Native American __ Asian __ Caucasin __ Other

DECLARATION BY VENDOR

I confirm that:

- i) Neither I nor any employee of _____ is in any way connected to the Housing Authority of New Orleans or its employees or an immediate family member of any Housing Authority of New Orleans employee.
- ii) For each relationship, I will include a brief statement describing the relationship.
- iii) The information furnished is correct to the best of my knowledge and belief.

Print Name of Authorize Signature

(Authorize Signature of Vendor)



Definitions:

Disadvantaged Business Enterprise (DBE) – A business enterprise that is 51% or more owned, controlled, and actively operated by one or more persons who are classified as members of a racial minority group, such as African American, Hispanic American, Asian Pacific American, Asian Indian American, Native American, Aleuts or Hasidic Jewish Americans.

Immediate Family - as the term relates to a public servant means his children, spouses of children, brothers, sisters, spouses of his brothers and sisters, parents, spouse, and the parents of his spouse.

Legal Entity - includes, but is not limited to, an individual (except that an individual and his or her spouse and their minor children are considered as one legal entity), partnership, association, company, corporation and trust.

Section 3 Business - A business that meets one of the following:

1. 51% or more owned and controlled by a resident of any HANO Housing site or whose full-time permanent workforce includes 30% of HANO residents of any housing site;
2. Hud Youthbuild Program in Orleans Parish;
3. Business concerns that are 51% or more owned and controlled by HANO residents or are low or very low-income Orleans Parish Residents or whose full-time permanent workforce includes 30% of HANO residents or low/very low-income Orleans Parish residents;
4. Business that subcontracts in excess of 25% of the total amount of subcontracts to business concerns identified in the preferences above.

Small Business Enterprise (SBE) - A business concern, including its affiliates, that is independently owned and operated, is organized for profit, and is not dominant in the field of operation for which it is bidding. Also, it qualifies as a small business under the criteria of size standards in 13 CFR Part 121 (see FAR 19.102).

Woman Business Enterprise (WBE) - A business enterprise that is 51% or more owned, controlled, and actively operated by one or more women.

Conflict of Interest Statement:

No public servant (HANO Employee) or a member of such a public servant's immediate family shall not be eligible, participate or enter into in any contract, subcontract or other transaction under the supervision or jurisdiction of the HANO. This restriction also applies to legal entities in which the public servants and/or immediate family members own an interest in excess of 25%.



VENDOR SETUP FORM (NON-PROCUREMENT)

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone Number: _____ Fax Number: _____

Email Address: _____

REQUIRED

Taxpayer Identification Number/Social Security Number: _____

Vendor Type (check one):

____ Resident (Relocation)

____ Legal Settlement

____ Employee

____ Other _____

.....

Approvals:

Department Head: _____ Date: _____

Finance Approval: _____ Date: _____ 1099? Y N

Procurement Approval: _____ Date: _____

Date Entered: _____ Entered By: _____



VENDOR/CONTRACTOR COMPLAINT FORM

Date: _____	Vendor/Contractor Name: _____
Department Name: _____	Vendor/Contractor Contact: _____
Location of Work: _____	Phone Number: _____
Evaluator Name/Position: _____	Contract Number: _____ (If Applicable)
Purchase Order Number: _____	Contract Name: _____ (If Applicable)
Contract/Purchase Order Amount: \$ _____	

Please complete the form, providing as many details as possible regarding the complaint. This form requires the signature of the Department Head of the initiating Department. Upon completion of this form, please forward to :

**Audrey Plessy
Contract Administrator
Procurement and Contracts Department
Phone: 670-3445
Fax: 286-8224
Email: aplessy@hano.org**

Date problem was identified on: _____

Description of Goods/Services: _____

Description of Problem: _____

How can the problem be resolved?

Contract Monitor Signature: _____ **Phone:** _____ **Date:** _____

Department Head Signature: _____ **Phone:** _____ **Date:** _____



CONSTRUCTION SERVICES PERFORMANCE EVALUATION FORM

Date: _____	Contractor Name: _____
Department Name: _____	Contractor Contact: _____
Location of Work: _____	Phone Number: _____
Evaluator Name/Position: _____	Contract Number: _____
Purchase Order#: _____	Contract Name: _____
Contract Amount: \$ _____	

CONTRACT DESCRIPTION: (Project Description):

CONTRACT PERIOD: FROM: _____ **TO:** _____

SECTION 1 - GENERAL SATISFACTION RATINGS

5- Excellent 4 – Good 3 – Satisfactory 2 - Poor 1 – Very Poor 0 – Unacceptable

PERFORMANCE	RATING	USER COMMENTS
Quality of Services - Construction completed per contract specifications. Work Site was left clean and ready for use or next phase of work.	N/A 5 4 3 2 1 0	
Performance/Delivery - Timeliness of installation and adherence to the project schedule.	N/A 5 4 3 2 1 0	
Customer Relations - Cooperative and responsive to HANO requests. Prompt and accurate payment applications were submitted.	N/A 5 4 3 2 1 0	
Personnel - Contractor and employees were knowledgeable and thorough with the work to be done and alerted HANO to problems in a timely manner.	N/A 5 4 3 2 1 0	



Problem Solving Ability – Contractor promptly notified PM of problems; Contractor sought creative and thorough resolution of problems. Responsive to all RFIs and HANO requests.	N/A 5 4 3 2 1 0	
Progress Meetings & Reports - Contractor attended and participated in progress meetings as required. Submitted detailed and accurate reports in a timely manner. Provided realistic scheduling information as needed.	N/A 5 4 3 2 1 0	
Budget – Contractor requested reasonable change order modification(s). Acted in the Owner’s best interests to minimize change orders.	N/A 5 4 3 2 1 0	
Closeout – Contractor Provided proper closeout documents within 60 calendar days of construction completion.	N/A 5 4 3 2 1 0	
DBW/WBE/Section 3 Participation – Contractor implemented and participated in HANO’s DBE/WBE/Section 3 Program as outlined in their plan.	N/A 5 4 3 2 1 0	
Change Orders - List all changes & modifications to the contract that affected the scope of work and/or altered the contract amount or duration. (provide a brief explanation)		
SECTION 2 – INCIDENT/NON-PERFORMANCE NARRATIVE		
<ol style="list-style-type: none"> 1. Has the Contractor completed the contract, change orders and warranty work in the contract time? Please explain (provide dates and other particular information): 2. Has the contractor delivered design, consulting or construction services that comply with the specifications of the contract? 3. Have there been problems associated with the installation of work under this contract? 		



4. Have you contacted the vendor to resolve the problem? If so, what actions have been taken?

5. Other comments: _____

Would you recommend contracting for this firm's services again? YES _____ NO _____
(Please explain)

Contract Monitor Signature: _____ **Phone:** _____ **Date:** _____

Department Head Signature: _____ **Phone:** _____ **Date:** _____



VENDOR/CONTRACTOR PERFORMANCE EVALUATION FORM

Date: _____	Vendor/Contractor Name: _____
Department Name: _____	Vendor/Contractor Contact: _____
Location of Work: _____	Phone Number: _____
Evaluator Name/Position: _____	Contract Number: _____
Purchase Order#: _____	Contract Name: _____
	Contract/Purchase Order Amount: \$ _____

DESCRIPTION OF GOODS/SERIVCES:

CONTRACT PERIOD: FROM: _____ TO: _____
(If applicable)

SECTION 1 - GENERAL SATISFACTION RATINGS

5- Excellent 4 – Good 3 – Satisfactory 2 – Poor 1 – Very Poor 0 – Unacceptable

PERFORMANCE	RATING	USER COMMENTS
Quality of Services – Vendor/Contractor complied with Purchase Order/Contract. Goods/Services were supplied in accordance with the scope of services.	N/A 5 4 3 2 1 0	
Performance/Delivery – Vendor/Contractor supplied goods/services in a timely manner and adhered to required schedule(s).	N/A 5 4 3 2 1 0	
Personnel – Vendor/Contractor was knowledgeable and understood all aspects of the scope of services or goods delivered. Vendor/Contractor alerted HANO staff of potential issues and were easy to communicate with.	N/A 5 4 3 2 1 0	
Problem Solving Ability – Vendor/Contractor was creative and thorough when resolving issues/problems and was responsive to HANO requests.	N/A 5 4 3 2 1 0	



Communication – Vendor/Contractor communicated effectively.	N/A 5 4 3 2 1 0	
Management – Vendor Contractor efficiently administered the requirements of the Purchase Order/Contract.	N/A 5 4 3 2 1 0	
DBW/WBE/Section 3 Participation – Contractor Implemented and Participated in HANO’s DBE/WBE Section 3 Program as outlined in their plan. (If applicable)	N/A 5 4 3 2 1 0	
Closeout – Vendor/Contractor provided the goods/services required without delay or additional contract costs.	N/A 5 4 3 2 1 0	

SECTION 2 – INCIDENT/NON-PERFORMANCE NARRATIVE

- Was the health or safety of residents/staff in jeopardy at any time during the contract? ___ Yes ___ No ___ N/A
(If yes, please explain): _____

- Did the Vendor/Contractor fail to perform all or part of the purchase order/contract? ___ Yes ___ No ___ N/A
(If yes, please explain): _____

- Was the Vendor/Contractor terminated for default or convenience under the contract? ___ Yes ___ No ___ N/A
(If yes, please explain): _____

- Would you recommend contracting for this firm’s services again? ___ Yes ___ No
(Please explain): _____

Contract Monitor Signature: _____ **Phone:** _____ **Date:** _____

Department Head Signature: _____ **Phone:** _____ **Date:** _____



DESIGN PHASE OR ENGINEERING SERVICES
(Quality of A/E Services Evaluation)

Attributes (if applicable)	DESIGN/SERVICES				
	Exceptional	Very Good	Satisfactory	Marginal	Unsatisfactory
Solution Environmentally Suitable					
Cooperativeness and Responsiveness					
Quality of Briefing and Presentations					
Innovative Approaches/Technologies					
Implementation/Participation in DBE/WBE Section 3					

CONSTRUCTION PHASE
(Quality of A/E Services Evaluation)

Attributes (if applicable)	MANAGEMENT SERVICES				
	Exceptional	Very Good	Satisfactory	Marginal	Unsatisfactory
Plans Clear and Detailed Sufficiently					
Drawings Reflect True Conditions					
Plans/Specs Accurate and Coordinated					
Design Constructability					
Cooperativeness and Responsiveness					
Timeliness and Quality of Processing Submittals					
Products & Equipment Selections Readily Available					
Timeliness of Answers to Design Questions					
Filed Consultation and Investigations					
Quality of Construction Support Services					

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INCIDENT/NON-PERFORMANCE NARRATIVE

Circle the appropriate response:

1. How many Addenda were issued during the pre-construction phase of the project? _____ How many were issued due to the A/E omission of data? _____

2. Did the A/E attend all job Meetings? YES NO NA (If no, please explain)

3. Did the A/E answer questions adequately and in a timely manner? YES NO NA (If no, please explain)

4. Did the A/E prepare and submit requests for payment in accordance with HUD Guidelines? YES NO NA (If no, please explain)

5. Did the A/E provide solutions that were cost effective to problems in a timely manner? YES NO NA (If no, please explain)

6. Did the A/E assess the cost reasonableness and provide an analysis, backup and reason for change? YES NO NA (If no, please explain)

7. Did the A/E prepare proposal requests which clearly define the scope changes (Change Orders)? YES NO NA (If no, please explain)

8. How many change orders were issued for the project? _____ (If applicable)

9. Please provide a brief description of the changes (If applicable):



10. Did the A/E submit reports when required under the contract? Yes ____ No ____ N/A ____
(If no, please explain):

11. Was A/E Firm terminated for default or convenience under the contract? Yes ____ No ____ N/A ____
(If yes, please explain):

12. Would you recommend the HANO use the services of this Architectural/Engineering Firm again? Please explain:

***IF SERVICES ARE NOT RECOMMENED FOR FUTURE CONTRACT, DEBRIEFING WITH A/E FIRM MUST BE SCHEULED. SCHEDULED DATE:_____**

Contract Monitor Signature:_____ Phone:_____ Date:_____

Department Head Signature:_____ Phone:_____ Date:_____