

PROCEDURES FOR ACQUIRING PERSONAL SERVICES

The Contracts Administrator, Administration Department, is charged with overseeing personal service contracts and the Project Manager is responsible for the management of the contract. When it is determined a personal service is required, the following procedures are to be followed.

- PM – Project Manager: Manages the project and project interaction with consultants
- CA – Contracts Administrator: Oversees the solicitation, contracts and regulatory documentation for the project
- LA – Legal Assistant: Assists both PM and CA in preparation of contracts and maintains centralized personal service contract files

No.	TASKS FOR MANAGING PERSONAL SERVICE CONTRACTS	Assigned To		
		PM	CA	LA
1.	Complete the Consultant Services Checklist and submit to the Contracts Administrator	X		
2.	Review checklist and determine the solicitation process to be used		X	
3.	Prepare scope of work (SOW)	X		
4.	Prepare request for proposals (RFP)	X		
5.	Review RFP to ensure regulatory and POE policy compliances are met		X	
6.	Prepare announcement or ad copy for RFP		X	
7.	Submit RFP to Builders Exchange and POE web site for posting, if applicable		X	
8.	Place advertisement, if formal process is used		X	
9.	Distribute announcement to selected consultants, if formal process is not used	X	X	
10.	Receive RFP submittals to ensure deadline (due date and time) are met		X	
11.	Select review committee and manage review process of RFP submittals	X		
12.	Schedule consultant interviews, if necessary	X		
13.	Select consultant for award	X		
14.	Negotiate price with selected consultant	X		
15.	Prepare contract and handle return of contract and other required documentation	X	X	X
16.	Maintain centralized file for personal service contracts and solicitations; Project Manager should maintain a copy of contract for their use			X
17.	Manage contract	X		
18.	Forward completed file to Legal Assistant after contract is closed	X		
	Contract Amendments			
19.	Prepare contract amendments or modifications	X	X	X
20.	Present to Commission amendments to contract of \$50,000+ when amendments singly or cumulatively exceed 50% of original contract	X		
	Substantial Changes or Substantial Additions to SOW			
21.	Prepare substantial changes or substantial additions to the SOW	X	X	X
22.	Present to the Commission substantial changes or substantial additions to the SOW for contract of \$50,000+; Commission to determine whether to award the additional work or award as a new contract	X		
	Sole Source			
23.	Complete Sole Source Justification form for sole source contract	X		
24.	Review sole source justification and recommend award to Executive Director	X	X	
25.	File with Commission sole source contract of \$50,000+ and make available for public inspection prior to contract starting date		X	
	Emergency			
26.	Prepare justification for emergency contract and provide to Contracts Administrator for review	X		
27.	Submit justification for emergency contract to Executive Director for approval	X	X	
28.	Assist Executive Director, if necessary, with filing emergency contract of \$50,000+ with Commission and making available for public inspection within 7 working days following the commencement of work or the execution of the contract, whichever occurs first		X	