



COLUMBIA UNIVERSITY FACILITIES AND OPERATIONS SUPPLIER ONBOARDING PUBLISHED JUNE 2019

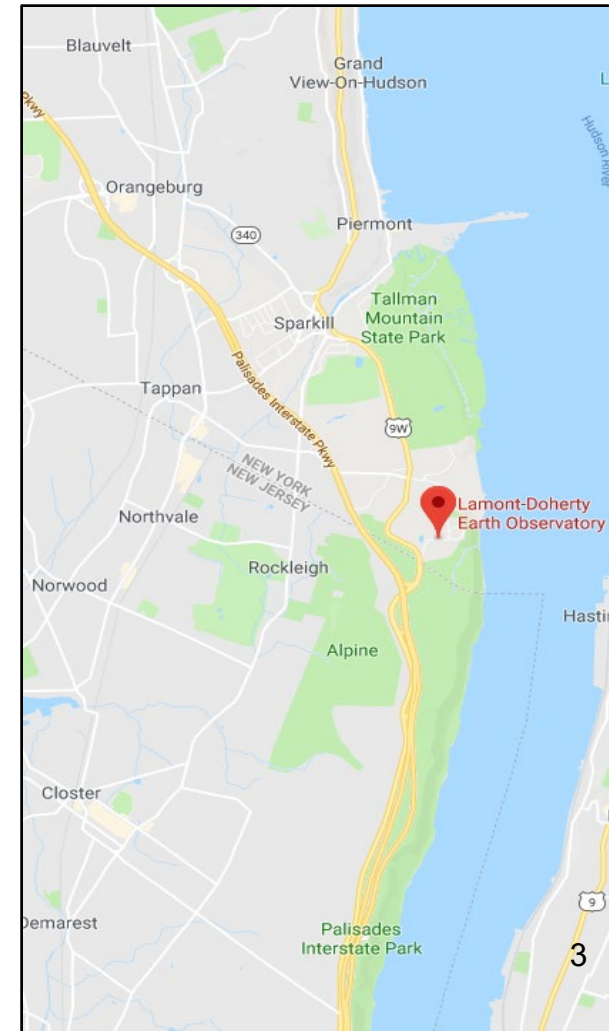
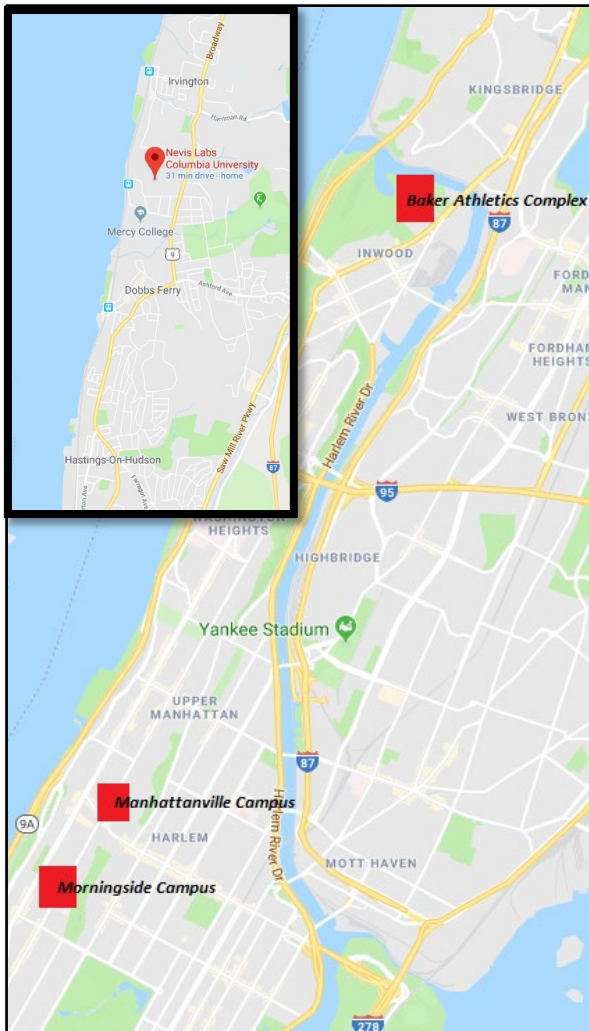
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**Please contact mv207@columbia.edu to obtain copies of Exhibits*

Columbia University Campuses

Columbia University Facilities and Operations departments manage the renovation and construction projects at Baker Athletics Complex, Nevis Labs, Manhattanville, Morningside, Columbia University Irving Medical Center, Lamont-Doherty Earth Observatory



Columbia University Campuses

Managed by CU Morningside Facilities and Operations

Baker Athletics Complex

Located at 218th Street and Broadway, Baker Athletics Complex is the primary athletics facility for Columbia outdoor sports programs, featuring Robert K. Kraft Field at Lawrence A. Wien Stadium, Rocco B. Commisso Soccer Stadium, Columbia Softball Field, Robertson Field at Satow Stadium, the Columbia Field Hockey Venue, The Dick Savitt Tennis Center, The Remmer and 1929 Boathouses, the Chrystie Field House and the Campbell Sports Center.

Manhattanville Campus

The newly constructed Manhattanville Campus includes more than 17 acres of property on the blocks from West 125th Street to 133rd Street between Broadway and 12th Avenue, as well as several properties on the east side of Broadway, from 131st to 134th Street. It is home to the Jerome L. Greene Science Center, Lenfest Center for the Arts, and the University Forum.

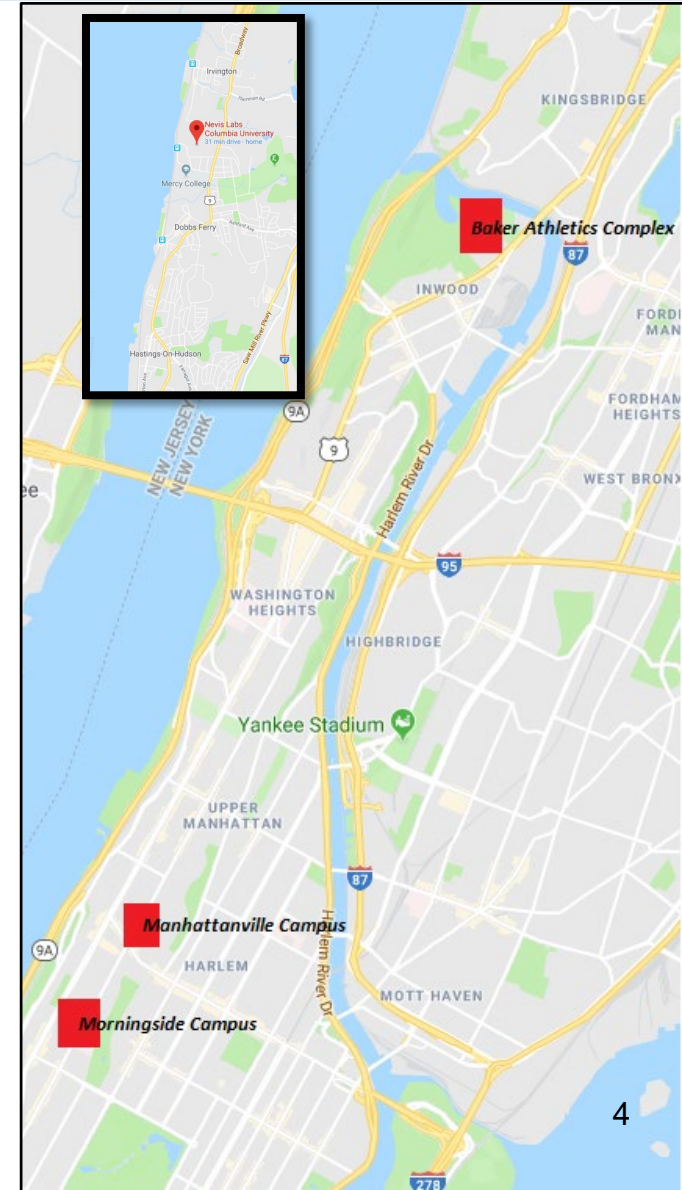
Morningside Campus

Columbia's Morningside Campus is located on the Upper West Side of Manhattan, with the core campus located between 114th Street and 120th Street from Morningside Drive to Broadway. This campus includes both academic and residential buildings.

Nevis Laboratories

Nevis Laboratories is a physics research facility operated by the Physics Department located in Irvington, NY.

For more information on Facilities Management of these campuses, visit: <https://cufo.columbia.edu/>



Columbia University Campuses

Managed by Columbia University Irving Medical Center

Facilities Management and Campus Services

Columbia University Irving Medical Center (CUIMC)

CUIMC sits on a 20-acre campus in northern Manhattan located between 165th Street and 173rd Street from Riverside Drive to Audubon Avenue (with one building at 390 Fort Washington Avenue). CUIMC is a center for excellence in transformative health care, education and healing.

For more information visit: <http://www.cumc.columbia.edu/facilities-management/>

Faculty Practices

ColumbiaDoctors provides patients with the expertise of more than 1,700 highly regarded physicians, surgeons, dentists, and nurses at locations throughout New York City and the surrounding area.

For a full list of locations, please visit: <https://www.columbiadoctors.org/locations>



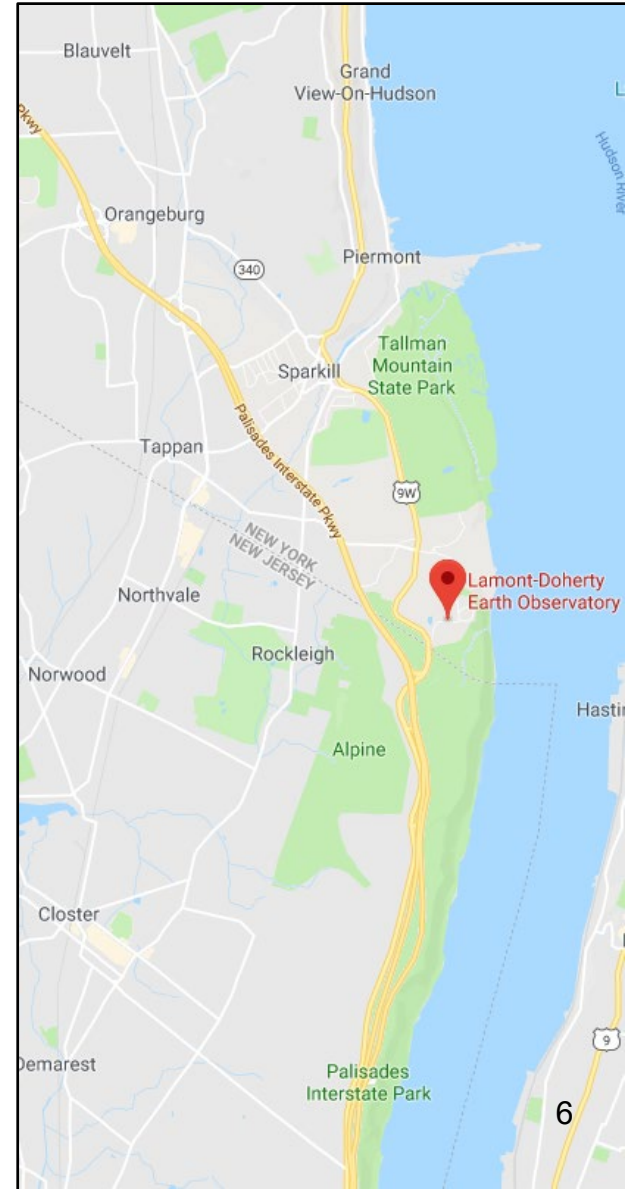
Columbia University Campuses

Managed by Lamont-Doherty Earth Observatory (LDEO)

Lamont-Doherty Earth Observatory (LDEO)*

LDEO sits on a high, forested bluff on the Palisades overlooking the Hudson River, about fifteen miles north of Manhattan.

For more information and directions, visit: <http://www.ldeo.columbia.edu/about-ldeo/maps-contacts>



*Large capital projects are managed by CU Morningside Facilities and Operations

Primary Contacts

CU Morningside Facilities and Operations

Topic	Contact Person / Group	E-Mail Address / Website	Telephone Number
Accounts Payable Assistance	CUFO Accounts Payable	cufaphelp@columbia.edu	212-854-6679
Invoice Submission*	CUFO Accounts Payable	cufap@cuf.columbia.edu	212-854-6679
General Questions / Onboarding	Manny Vasquez	mv207@columbia.edu	212-854-8574
Certificates of Insurance	Manny Vasquez	mv207@columbia.edu or CUFOCOI@columbia.edu	212-854-8574
Procurement (Bids, Contracts, Purchase Orders, Change Orders)	Theresa Formato	tf2287@columbia.edu	212-854-2501
Change of Address or Company Information	Central Vendor Management	http://finance.columbia.edu/procurement/vendor-management	N/A
Minority, Women, & Local Initiatives and Questions	Scharlene De La Cruz	sd3286@columbia.edu	212-854-5375
Reporting for Minority, Women, & Local Initiatives	Youseph Anwar	ya2425@columbia.edu	212-853-0240

****All invoices submitted to CUFO Accounts Payable must be submitted utilizing the Excel worksheet referenced as Exhibit A. All new vendors will be emailed an invoice template in Excel format to submit your invoices for processing***

Primary Contacts

CU Irving Medical Center Facilities and Operations

Topic	Contact Person / Group	E-Mail Address	Telephone Number
Accounts Payable – Capital Project Management*	Christina Garcia	cg2763@cumc.columbia.edu	212-305-0971
Accounts Payable – Operations, Engineering*	Janet Salinas-Vasquez	js1836@cumc.columbia.edu	212-305-1766
Accounts Payable – Housing*	Maritza Pierret	mp584@cumc.columbia.edu	212-304-7009
Procurement (Bids, Contracts, Purchase Orders, Change Orders)	Mary Ann Egel-Guida	mae2152@cumc.columbia.edu	212-342-4423
Certificates of Insurance, Contracts	Christina Garcia	cg2763@cumc.columbia.edu	212-305-0971
Change of Address or Company Information	Central Vendor Management	http://finance.columbia.edu/procurement/vendor-management	N/A
Minority, Women, & Local Initiatives, Reporting and Questions	Susann Miles	swm2129@cumc.columbia.edu	212-305-0188

****Please contact the individual Accounts Payable representatives for specific invoice submission instructions. Do Not utilize the instructions included in Exhibit A.***

Primary Contacts

Lamont Doherty Earth Observatory

Topic	Contact Person / Group	E-Mail Address	Telephone Number
Accounts Payable Assistance	Yesenia Capellan	capellan@LDEO.columbia.edu	845-365-8856
Invoice Submission*	Margaret Morrone	morrone@LDEO.columbia.edu	845-365-8600
General Questions / Onboarding	N/A	bng@LDEO.columbia.edu	N/A
Procurement (Bids, Contracts)	Karen Hoffer	kh313@columbia.edu	845-365-8404
Transaction Status (Purchase Orders, Change Orders)	Karen Hoffer	kh313@columbia.edu	845-365-8404
Certificates of Insurance, Contracts	Tracy Livingston	tl2025@columbia.edu	212-851-0416
Change of Address or Company Information	Central Vendor Management	http://finance.columbia.edu/procurement/vendor-management	N/A

****Please contact the individual Accounts Payable representatives for specific invoice submission instructions. Do Not utilize the instructions included in Exhibit A.***

Public Safety

For more information about Columbia Public Safety and emergency protocols please visit: <https://publicsafety.columbia.edu/>

Please save the emergency number for the campus you will be working on in your cell phone

Location	Phone Number	Emergency Phone Number
Columbia University Irving Medical Center	212-305-8100	212-305-7979
Lamont-Doherty Earth Observatory	845-359-2900	911 then 555
Manhattanville Campus	212-853-3301	212-853-3333
Morningside Campus	212-854-2797	212-854-5555
Nevis Laboratories	914-591-2870	911

Supplier Approval Process

- All suppliers of the University must be approved in the University's Finance system, ARC, in order to begin work with the University.
- Vendor Management is the central unit responsible for approving suppliers in ARC. The supplier will receive a series of automated emails from Columbia University Supplier Management to complete company and financial information.
- Upon approval, you will be issued a vendor ID number. Keep this number on file so that you may update your profile if needed. Columbia University can now transact with your firm, but this does not guarantee business.
- ***If any firm information changes during the course of business, firm must initiate changes to Columbia Supplier Profile.*** Please refer to ***Exhibit B: "Instructions for Suppliers to Update Columbia Supplier Profile Information"*** utilizing your ARC Vendor ID as the starting point.
- ***If you have a change of address, banking account, EIN, you MUST update this information on your Columbia Supplier Profile immediately, as this will affect your receipt of payment.***
- <http://finance.columbia.edu/procurement/vendor-management>
- Supplier will define a primary trade their firm specializes in and up to 10 specialties. It is important to complete this accurately to ensure CU can identify your firm for their needs.
- Once approved, your firm is eligible for inclusion in procurement of facilities related goods and services.

Procurement Process – Construction Related Services

Overview of Competitive Procurement Process:

- A Request for Proposal or Quotation will be sent to selected vendors through our Electronic Bidding module in the Unifier project management system. Comprehensive instructions will be included in each RFP invitation.
- Bidders are provided with a comprehensive scope of work, drawings and specifications (if applicable), contact information for questions, a procurement schedule, a sample contract, a contract acknowledgement form, CU instructions to bidders and policies.
- Proposals must be received before due date and time. Proposals must include a completed pricing sheet and exceptions to the scope of work (if applicable).
- Proposals are reviewed amongst a group of University officers. Bidders may be requested to interview, submit a clarification bid, or engage in a negotiation of terms or cost.
- An award decision is communicated to all bidders regardless of award or non-award.
- ***A valid certificate of insurance is required to work with the University before a contract can be issued.***
- Contract is sent to vendor for execution. CU provides counter signature. ***Under no circumstances can work begin without a fully executed contract.***
- A purchase order is issued to the vendor for payment of invoices. This purchase order number must be noted on all invoices when submitted to Accounts Payable.

Procurement Process – Non-Construction Related Services

- Non-construction, maintenance and facilities related services are generally procured without a contract
- The Purchase Order terms dictate the terms of the agreement -

https://finance.columbia.edu/files/gateway/forms/PO_Terms_and_Conditions.pdf

- Examples of these types of services include services such as training, workshops, and the purchase or rental of minor goods and equipment

Overview of Procurement Process:

- Project manager will request a quote / proposal for specific goods or services
- ***If you are coming to a Columbia University property, a valid certificate of insurance is required to work with the University before a purchase order can be issued***
- A purchase order is issued to the supplier for payment of invoices. ***Work should not begin before a purchase order is generated.***
- This purchase order number must be noted on all invoices when submitted to Accounts Payable

Contract Types

All construction, maintenance and facilities related work is contracted utilizing one of the following contract types. The contract will detail all needed information for successful completion of your job including the contract term, work dates, scope of work, insurance, billing, and change order requirements. Details on each contract type and requirements for working within this contract are included as an Appendix to this presentation.

Contractor Agreements

Task Order

Service Agreement

Construction Manager

General Contractor

Consultant Agreements

Term Consultant

Consultant Letter of Agreement

Service Provider

Insurance Requirements

- All suppliers must meet University insurance requirements. These requirements are based on an assessment of risks related to type, scope and dollar value of work to be completed. All insurance requirements are finalized in the contract or purchase order terms and conditions.
- All Certificates of Insurance must be submitted to the primary email contact listed on pages 6-8 upon communication of project award and **prior to the start of work**.
- Submit new Certificates of Insurance at least 30 days prior to the expiration of your current certificate.
- Each certificate of insurance shall provide for a 60-day written notice of cancellation or material change.
- With the exception of Workers' Compensation, Professional Liability, and Employer's Liability Insurance, the Description of Services shall name ***"The Trustees of Columbia University in the City of New York, its Trustees, officers, agents and employees"*** as an additional insured.
- The Certificate Holder must be designated as: ***"The Trustees of Columbia University in the City of New York – Attn: Risk Management – 615 West 131st Street, 3rd Floor – New York, NY 10027."***
- ***See Exhibit I: Certificate of Insurance Sample***

Supplier Performance Expectations

- Doing business with Columbia requires business capacities on the part of suppliers, including but are not limited to: internet access, electronic billing and invoicing, financial reporting and administrative capabilities, and maintaining proper insurance
- Regardless of size, any company wishing to do business with Columbia will be required to provide high-quality goods and services, timely delivery, and competitive pricing
- All suppliers who provide services to Columbia must adhere to the highest standards of professionalism, including, but not limited to:

ETHICS

- Appropriate, professional conduct
- Ethical business practices
- Disclosure of any conflicts of interest with the University and it's employees
- Integrity
- Ensure that all employees have undergone background checks

ACCOUNTING PRACTICES

- Knowledgeable staff to manage invoicing and contracts
- Professional billing system (ex: Quickbooks)
- Internet access and e-mail proficiency
- Understanding of facility management systems

BUSINESS PRACTICES

- Offer competitive and fair pricing
- Responsive to Columbia's requests
- Timely execution of work
- Financial capacity to perform work awarded
- Honor terms and commitments of the contract
- Maintain required insurance levels
- Maintain current licenses and certifications
- Ongoing safety and compliance trainings

Supplier Performance Rating

- All Suppliers will be reviewed and evaluated by the project manager at the end of every job using the Supplier Scorecard, pictured below. Additionally, all new Suppliers will be reviewed every six months
- The purpose of the Supplier Performance Review is to evaluate the quality of service provided to Columbia University by our suppliers
- Suppliers with low performance will be reviewed by the University

VENDOR RATINGS **Average Rating:** [View current ratings](#)

Project Number - Description: -

1. TIMELINESS. How would you rate the contractor's ability to meet the project schedule?

2. QUALITY. How would you rate the contractor's overall quality of work?

3. OVERALL PERFORMANCE. Considering ease of use, value, attention to detail, and professionalism, please rate the contractor's overall performance.

4. CHANGE ORDER MANAGEMENT. Did the contractor propose an excessive amount of change orders due to field conditions? (**excessive = poor = 1 star**)

5. PROJECT CLOSE-OUT. Did the contractor properly close-out the project, provide as-built documents and finish all items on the punch list in timely manner?

6. RECOMMEND. Would you use/recommend this contractor for future work at Columbia University?

7. COMMENTS. Please comment on the contractor's strengths and/or weaknesses (500 chars max):

SUBMIT

Supporting Minority-, Women-, and Locally-owned Business Enterprises

Overview:

- Columbia University has a long-standing commitment to working with minority-, women-, and locally-owned (MWL) business enterprises, whether by establishing purchasing relationships with suppliers, entering into consulting agreements for services, or contracting for construction, renovation, or repair services.
- This commitment is related directly to the maintenance of a strong and healthy free enterprise system, the goals of equal opportunity and diversity, and increasing the participation of qualified minority- and woman-owned and locally-based businesses working with the University.

Supplier Requirements (*See Exhibit F: MWL Requirements and Forms*):

- General Contractors and Construction Managers that are awarded work over \$100,000 but under \$1M are required to make their **BEST EFFORTS** to subcontract at least 35% of their overall award to MWL firms. Columbia has resources / suggestions of qualified firms readily available, if needed. Reporting requirements are outlined in **Exhibit F**.
- General Contractors and Construction Managers that are awarded work over \$1M are **REQUIRED** to subcontract at least 35% of their overall award to MWL firms and hire 40% MWL workforce for the project. Reporting requirements are outlined in **Exhibit F**.
- For any questions regarding Columbia's commitment to Minority, Women or Local business enterprises please e-mail MWLBESupport@columbia.edu

Minority- and Women-owned Business Enterprises

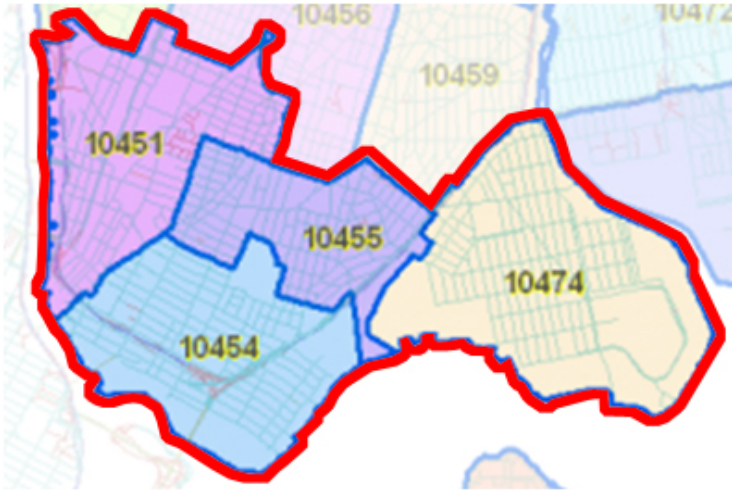
- In order to participate in contracting opportunities as a Minority and/or Women Business Enterprise (M/WBE), firms must be able to demonstrate that they are certified.
- Typically, certification by established governmental and quasi-governmental agencies is required and the University will rely on M/WBE certifications granted by specifically identified agencies or institutions in New York, New Jersey and Connecticut.
- Columbia accepts certifications from the agencies listed below:
 - New York Empire State Development (ESD): <https://esd.ny.gov/mwbe/certification.html>
 - New York Metropolitan Transit Authority (MTA): <http://web.mta.info/mta/procurement/d-m-wbe.htm#begin>
 - New York School Construction Authority (SCA): <http://www.nycsca.org/MWLBE/Certification-Process>
 - New York City Department of Small Business Services (SBS):
<http://www.nyc.gov/html/sbs/nycbiz/html/summary/certification.shtml>
 - Port Authority of New York/New Jersey: <http://www.panynj.gov/business-opportunities/sd-become-certified.html>
 - Women's Business Enterprise National Council (WBENC): <https://www.wbenc.org/certification/>
 - New York & New Jersey Minority Supplier Development Council (NY NJ MSDC): <http://nynjmsdc.org/get-certified/>
 - Connecticut State Minority Business Enterprise: <https://portal.ct.gov/DAS/Procurement/Supplier-Diversity/SBE-MBE-Program-Certification-Application-Small-or-Minority-Business-Enterprise>
 - New Jersey Minority/Women Certification: https://www.nj.gov/njbusiness/documents/contracting/NEW%20MBE-WBE%20Web%20Application%20JAN_2012.pdf
- In the event a firm is certified by an agency other than the ones listed above, the Office of Construction Business Initiatives can provide an exception waiver on an as needed basis.

Locally-Owned Business Enterprises

As a Harlem-based institution, the University principally defines its “local” catchment area as those communities located in the 13 zip codes in Harlem, Washington Heights, Inwood and the four zip codes within the South Bronx. In select cases, local may be defined as all five boroughs of New York City. You should inquire with your Columbia contact to determine if this is the case for your project.

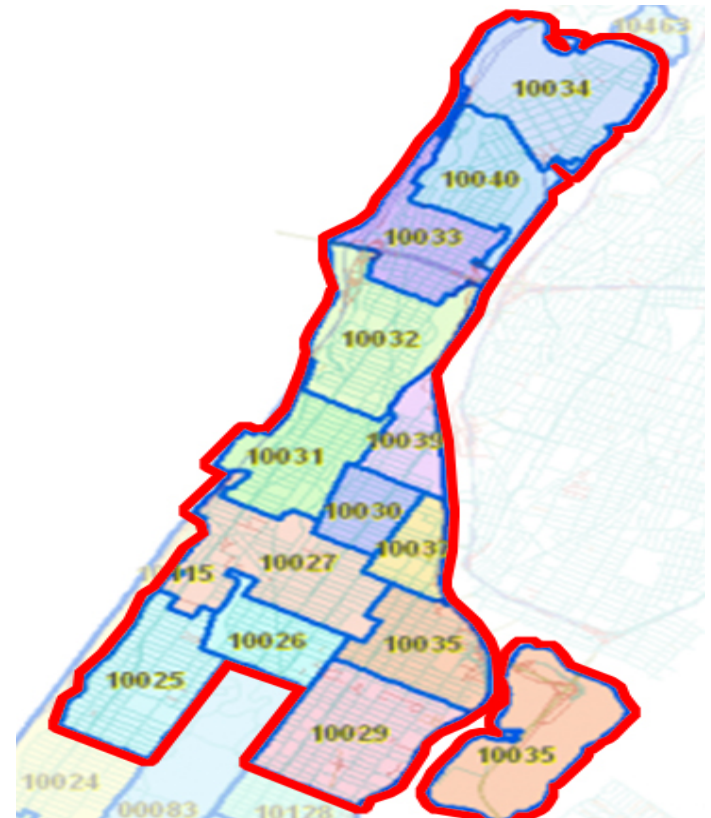
Complete list of Zip Codes

10025
10026
10027
10029
10030
10031
10032
10033
10034
10035
10037
10039
10040
10451
10454
10455
10474



South Bronx (4 zip codes)

Upper Manhattan Empowerment Zone (UMEZ)
(13 zip codes)



Systems

Unifier and Maximo are the primary project management and work order management systems utilized by CU Morningside Facilities and Operations and CU Irving Medical Center Facilities and Operations

	Unifier	Maximo
Primary Use	Project Management System	Work Order and Repair Management System
Functionality	Allows vendor to submit potential change orders (PCOs) and invoices directly into the system for payment. Allows vendor to track these items for approval. Utilized as mechanism for electronic bidding.	Allows vendor to receive task order or repair requests, submit proposal for requested work, receive approval of the work plan, and submit invoices directly into the system for payment. Allows vendor to track these items for approval.
Suppliers with Access	Selected general contractors and construction managers will be granted access, a license and training.	Most task order vendors and service maintenance providers will be granted access, a license and training.

Suppliers who are not granted access to either system must submit their change orders directly to the project manager, and their invoices directly to accounts payable.

Columbia University Administrative Policy Library

Relevant Policies for Vendors:

- CU Morningside Facilities and Operations Design Requirements: <https://facilities.columbia.edu/design-requirements>
- Contractor Compliance Guidelines:
https://facilities.columbia.edu/files_facilities/imce_shared/Contractor_Compliance_Guideline_2019.pdf
- Minority- and Women-owned Business Enterprises, Locally-based Business Enterprises (M/W/LBEs) Non-Discrimination and Affirmative Action Requirements: <https://policylibrary.columbia.edu/minority-and-womenowned-business-enterprises-locallybased-business-enterprises-mwlbes-nondiscriminat>
- Purchasing Code of Ethics: <https://policylibrary.columbia.edu/code-ethics-purchasing>
- Conflict of Interest: <https://policylibrary.columbia.edu/conflicts-interest>
- Vendor Gift Policy: https://policylibrary.columbia.edu/files/policylib/imce_shared/Vendor_Gift_and_Invitation_Policy.pdf
- Protection of Minors: <https://policylibrary.columbia.edu/protection-minors-columbia-reporting-suspected-abuse-and-maltreatment-minors>
- Environmental Stewardship: <https://sustainable.columbia.edu/>

For a complete listing of all the University's policies, please visit: <http://policylibrary.columbia.edu/>

APPENDIX

Requirements by Contract Type:

- Task Order Contract
- Service Maintenance Contract
- Construction Manager and General Contractor
- Term Consultant
- Consultant Letter of Agreement and Service Provider

Task Order Contract

Task Order Contract

Description	<ul style="list-style-type: none"> • University Wide contract for a vendor to perform task-based jobs on an as-requested basis • Award value is limited to \$30,000 for single trade jobs, and \$70,000 for multiple trade jobs • Hourly wage rates, overhead and profit, and task-specific/unit rates are negotiated at beginning of contract for the duration of the contract term • Manager will solicit quote from vendor for work and provide written acceptance and authorization to proceed • Depending on the type of project you may be requested to submit a work plan in Maximo. Upon approval of the plan you may proceed with the work.
Proposal Requirements	<ul style="list-style-type: none"> • Proposal must clearly breakdown hourly wage rates, cost of materials and equipment, and overhead and profit (See Exhibit C: Task Order Proposal Template) • Proposals are required for use of all sub-contractors • A purchase order number is not generated for each individual task-based job within these limits
Change Order Requirements	<ul style="list-style-type: none"> • Change orders must clearly breakdown hourly wage rates, cost of materials and equipment, and overhead and profit (See Exhibit D: Change Order Template) • Must be submitted to Project Manager who will provide written acceptance and authorization to proceed
Invoice Requirements	<ul style="list-style-type: none"> • Work shall be invoiced upon completion • Required backup includes but is not limited to: breakdown of hours worked by category of labor, approved wage rates, cost of materials and equipment, overhead and profit, and a release and waiver of lien (See Exhibit E: Partial and Final Waivers of Lien) • Timesheets / payroll backup is required for all scopes of work utilizing a total of 100 labor hours or more • Invoices are required for payment of any material charge with a <i>unit cost</i> of \$2,500 or more • Invoices are required for all subcontractors utilized. Subcontractors invoice must be broken down by labor hours, hourly wage rates, cost of materials and equipment, and overhead and profit. • At the discretion of CU, any additional supporting documentation may be requested

Service Maintenance Contract

Service Maintenance Contract

Description	<ul style="list-style-type: none"> • Scope specific contract for preventative / regular maintenance services • Hourly wage rates, overhead and profit, and task-specific/unit rates are negotiated at beginning of contract for the duration of the contract term • A purchase order will be issued
Proposal Requirements	<ul style="list-style-type: none"> • Proposals must be broken down by service and site / building name • Proposal must clearly state frequency of preventative maintenance services
Change Order Requirements	<ul style="list-style-type: none"> • Any repairs completed outside of the service/ preventative maintenance scope of work must clearly breakdown hourly wage rates, cost of materials and equipment, and overhead and profit (<i>See Exhibit D: Change Order Template</i>) • Proposals are required for use of all sub-contractors • Repair or change order requests must be submitted to Project Manager for written approval to proceed • Depending on the dollar value of the repair work, you will be issued a Maximo work order or a purchase order
Invoice Requirements	<ul style="list-style-type: none"> • Work shall be invoiced on a periodic basis as dictated by the contract (i.e.: monthly / quarterly / annually) • Timesheets / Payroll backup is required as backup • Invoices are required for payment of any material charge with a <i>unit cost</i> of \$2,500 or more • Invoices are required for all subcontractors utilized. Subcontractors invoice must be broken down by labor hours, hourly wage rates, cost of materials and equipment, and overhead and profit

Construction Manager and General Contractor

Construction Manager and General Contractor

Description	<ul style="list-style-type: none">• Project specific contract for general contracting or construction management services• Hourly wage rates, overhead and profit, and task-specific/unit rates for additional work are negotiated at beginning of contract for the duration of the contract term• A purchase order will be issued
Change Order Requirements	<ul style="list-style-type: none">• Change orders must clearly breakdown hourly wage rates, cost of materials and equipment, and overhead and profile (<i>See Exhibit D: Change Order Template</i>)• Must be submitted to Project Manager who will provide written acceptance and authorization to proceed• Proposals are required for use of all sub-contractors.• Selected General Contractors and Construction Managers will be granted access to the Unifier project management system and can submit Proposed Change Orders (PCOs) directly in the system. <i>GC/CM can proceed with PCOs only when they have a status of "Approved PCO"</i>
Invoice Requirements	<ul style="list-style-type: none">• Invoices must be submitted in AIA format in the same structure as the Rider A proposal (by trade/CSI code)• Lien Waivers are required for all invoices from both the GC/CM and subcontractors (<i>See Exhibit E: Partial and Final Waivers of Lien</i>)• For awards over \$100K, Minority, Women and Local Effort Reporting is required (<i>See Exhibit F: MWL Requirements and Forms</i>)• For Construction Managers only, invoices for General Conditions must be accompanied by supporting documentation as required in the contract

Term Consultant

Term Consultant

Description	<ul style="list-style-type: none">• University Wide contract for a vendor to perform task-based jobs on an as-requested basis• Hourly wage rates and task-specific rates are negotiated at beginning of contract for the duration of the contract and must be utilized when preparing proposals and invoices• Award value is limited to \$100,000• A purchase order is generated for proposals exceeding \$5,000• Manager will solicit quote from vendor for work and provide written acceptance and authorization to proceed
Proposal Requirements	<ul style="list-style-type: none">• Proposal must clearly breakdown hourly wage rates (<i>See Exhibit G: Term Consultant Proposal Template</i>)• Proposals are required for use of all sub-consultants
Change Order Requirements	<ul style="list-style-type: none">• Change orders must clearly breakdown hourly wage rates (<i>See Exhibit H: Term Consultant Change Order Template</i>)• Proposals are required for use of all sub-consultants• Must be submitted to Project Manager who will provide written acceptance and authorization to proceed
Invoice Requirements	<ul style="list-style-type: none">• Invoices shall be submitted monthly based upon actual labor and reimbursables expended during the prior billing month• Invoices are required for all subconsultants utilized• Copies of receipts are required for reimbursement of allowed reimbursable expenses

Consultant Letter of Agreement and Service Provider

Consultant and Service Provider Agreement

Description	<ul style="list-style-type: none">• Project specific contract for a vendor to perform architectural or engineering services (Consultant Contract) or consulting services other than architectural or engineering related services (for example: marketing) (Service Provider Contract)• Hourly wage rates for additional work are negotiated at beginning of contract for the duration of the contract term• A purchase order will be issued
Change Order Requirements	<ul style="list-style-type: none">• Change orders must clearly breakdown hourly wage rates (<i>See Exhibit H: Consultant Change Order Template</i>)• Proposals are required for use of all sub-consultants• Must be submitted to Project Manager who will provide written acceptance and authorization to proceed
Invoice Requirements	<ul style="list-style-type: none">• Invoices shall be submitted monthly based upon actual labor and reimbursables expended during the prior billing month• Invoices are required for all subconsultants utilized• Copies of receipts are required for reimbursement of allowed reimbursable expenses

Questions?