

CONTRACT CHECKLIST - REQUIRED ITEMS

Use of this checklist will also ensure audit compliance

This checklist must be included in the contract module along with all the required documents listed below. Each document must be attached separately in MUNIS.

<input type="checkbox"/>	COMPANY OR CONTRACTOR NAME: _____ VENDOR #: _____
<input type="checkbox"/>	CITY OF RICHMOND BUSINESS LICENSE NO: _____ EXPIRATION DATE: _____ <input type="checkbox"/> Contracts under \$5,000 <input type="checkbox"/> Written exemption from Accounting Manager over Revenue
<input type="checkbox"/>	INSURANCE CERTIFICATE WITH ENDORSEMENT Certificate of Insurance and additional Insured Endorsements (General Liability; Business Auto; Waiver of Subrogation) naming the City of Richmond as additional insured.
<input type="checkbox"/>	INSURANCE APPROVAL - Approved Insurance Form from Risk Manager
<input type="checkbox"/>	APPROVED LEGAL OPINION
<input type="checkbox"/>	VENDOR SIGNED CONTRACT - Short-Form Contract ≤ \$10,000 - Standard Contract > \$10,000 Note: Contract is routed for approval after contract is approved in MUNIS. Fully executed contract is attached to the contract module prior to entering requisition in MUNIS.
<input type="checkbox"/>	EVIDENCE OF COMPETITIVE BIDDING OR SOLE SOURCE OR EMERGENCY JUSTIFICATION OR PIGGYBACK/COOPERATIVE AGREEMENT <input type="checkbox"/> Less than \$3,000 – One written quote <input type="checkbox"/> Between \$3,000 to \$4,999 – Two written quotes – Attach Quote Summary or Rating Matrix <input type="checkbox"/> Between \$5,000 to \$50,000 – Three written quotes - Attach Quote Summary or Rating Matrix <input type="checkbox"/> Over \$50,000 – Competitive Sealed Bids or Proposals <input type="checkbox"/> Include BidsOnline Project Report <input type="checkbox"/> Include Rating Matrix or Canvass of Bids <input type="checkbox"/> Include Bid Solicitation or Request for Proposal or Request for Qualifications <input type="checkbox"/> APPROVED SOLE SOURCE FORM <input type="checkbox"/> APPROVED EMERGENCY JUSTIFICATION FORM <input type="checkbox"/> ≤ \$10,000 Signed by Depart. Head, Finance Director, City Manager: Date Signed by CM _____ <input type="checkbox"/> > \$10,000 Signed by Depart. Head & Finance Director: Date Signed by Finance Director _____ <input type="checkbox"/> PIGGYBACK/COOPERATIVE AGREEMENT <input type="checkbox"/> Copy of Solicitation <input type="checkbox"/> Approved Piggyback Justification signed by Finance Director
<input type="checkbox"/>	COUNCIL APPROVAL DATE: _____ - If over \$10,000 – Attach the following Documents <input type="checkbox"/> Minutes (or email from City Clerk’s office) <input type="checkbox"/> Staff Report <input type="checkbox"/> Resolution (if applicable)
<input type="checkbox"/>	INFORMATION TECHNOLOGY ITEMS - If the item being purchased is an information technology item, include the Approved IT Authorization Form signed by the IT Director
<input type="checkbox"/>	CONTRACT AMOUNT – \$ _____ QUOTE/BID AMOUNT- \$ _____ TERM OF CONTRACT - _____ Note: This amount must match the council approved amount, and amount entered in MUNIS

Requisitioner’s Name: _____

Department: _____

City of Richmond Business License Notes:

- Non-profits will need to obtain a business license tax certificate. If they have proof of non-profit status, their business tax will be waived but they will be responsible for certain fees including a one-time \$35 registration and recurring \$4 State pass through fee.
- Required of all vendors with physical presence (working in) Richmond or those entering Richmond to provide services.
- License required if vendor's cumulative fiscal year total dollars = \$5,000 or more – even if service is intangible (i.e. consulting)

Note: There are exceptions. If unclear, written exemption from Accounting Manager over Revenue is required in order to bypass the business license requirement.

Insurance Certificates: Contact Risk Management for questions regarding certificates and waivers.

- Do not submit expired or about to expire insurance certificates.
- For certificates pending renewal or about to expire – at least 3 months of any new contract period should be covered by the insurance certificate submitted.
- Must specify City of Richmond as “Additional Insured” and an endorsement must be attached.
- Document must be endorsed (signed)
- If coverage is for less than the term of contract, the requisitioner must ensure new insurance documents are received and attached to the contract.
- If coverage (carrier) changes, the requisitioner must verify that nothing has been dropped or \$ reduced.