

## **CHECKLIST FOR CITY CONTRACTS TO PURCHASE SOMETHING START TO FINISH**

### Before starting work on the contract:

- Confirm appropriate method of competitive selection based on price, nature of purchase, etc. (compliance with [Purchasing Guidelines](#) and any federal grant procurement requirements when applicable.)
- If software/technology – first must be approved for [New Technology Request](#) by City IT.
- Have you finalized the business deal? Do you have an accurate final quote/price proposal? Do you have a good description of the scope of work?
- Determine who will sign for City (mayor/clerk or Purchasing Agent. [MGO 4.26](#))
- Do you need a resolution? See this [chart](#) or [MGO 4.26](#).
- If so, do you have the information necessary to write your resolution? (contractor name, purpose of contract, duration, any renewals, total price, budget authority) (See [sample resolutions](#) here.)
- Do you need a POS contract? (over \$10k total for regular services or \$25k/year for software/tech annual services)
- Select appropriate POS template from [Employeeenet/forms](#)
- Has the contractor seen our POS yet? Are they aware of our required legal terms?
- Have you ever made a similar contract before w/ same vendor? If so adjust contract to match previous agreed changes, when appropriate.
- Have you selected and finalized your contract attachments? (Scope, Quote, Payment schedule, etc.)

(prepare / negotiate / complete contract and assemble single PDF with all attachments.)

### BEFORE signature:

- Determine if AA Plan is needed or any other forms must be filed with DCR and instruct contractor to file them or select 30 day option. See par. 13 of POS contract.
- Obtain certificate of insurance (COI) demonstrating all insurance required by the contract
- Obtain W-9 if new vendor & set up vendor in Munis
- Open a requisition in Munis when required
- Locate copy or link to adopted resolution when required

### Contract signature steps:

- (a) Signed by mayor/clerk with resolution – “route” for signatures via email, use contract routing database, Acela system coming soon (see OCA memo / new Acela TBD)  
Follow all [current procedures](#) for “how” to properly route a contract for e-signatures.
- (b) Signed by purchasing / mary richards – submit in Munis (see POS signature page)

### After signature:

- Save signed copy for yourself and send signed contract and PO (Purchase Order) to contractor
- Track contract progress, expiration date, any renewals, etc.