

2006 APR 20 PM 4:23



Memo

Office of the City Administrator

April 19, 2006

To: Agency/ Department Heads
From: Deborah Edgerly, City Administrator
Re: New Contracting Procedures

At the Finance and Management Committee meeting of April 11, the Committee discussed various recommendations on contracting procedures from the Budget Advisory Committee. The Committee directed the City Administrator's Office to implement certain improvements to the City's procedures. These improvements and due dates for implementation are discussed below:

Housing of Contracts with the City Clerk's Office

The City Clerk is the official custodian of City records and a copy of all contracts must be on file in the Clerk's Office. Agency/Department Heads must ensure that all active contracts have been forwarded to the City Clerk by **May 31, 2006**.

Clerk as Signatory to All Contracts

Effective immediately, contracts must contain a signature line for the City Clerk. The Clerk, or designee will sign off on each contract to indicate receipt, make a copy for the files and return the original(s) to the originating department. The City Clerk shall be the final signatory on all documents (following the contracting party, Agency Head and City Administrator). This procedure is designed to ensure that a copy of all future contracts is housed in the City Clerk's files.

Schedule A -- Contract Scope of Work/Deliverables

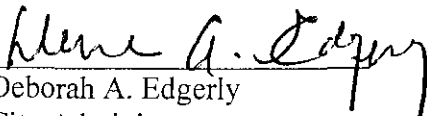
A new Schedule A has been developed and must be attached to each contract, **effective immediately**. This schedule provides basic information on the City contract for the contract, contract goals and a summary of contract deliverables. A copy of the new schedule is attached and available electronically on Oaknet.

Contract Training

Revised contract training is currently being developed to address the new and existing contracting procedures. This training will be **mandatory** for all City employees involved with contracts and will be completed by **August 31, 2006**. All Agency/Department Heads must provide a list of their employees who are involved in the administration and management of contracts to Marcia Meyers, Director of Personnel, by **May 15, 2006**. These individuals will be contacted to sign up for the class, once the training dates are set.

Contract Renewals/Extensions

Effective immediately, agenda reports for contract renewals and extensions must note if any required audits or evaluations (if applicable) have been completed. A copy may be attached to the agenda report, or information provided on how a copy of the audit or evaluation may be obtained.


Deborah A. Edgerly
City Administrator

CITY OF OAKLAND

SCHEDULE A*

CONTRACT SCOPE OF WORK / DELIVERABLES

FOR USE BY ALL CITY AGENCIES AND DEPARTMENTS

1. Agency: _____ Department: _____
2. Project Manager / Responsible Employee Name: _____
 Title: _____ Phone: _____ email: _____
3. Supervisor / Direct Report or Alternate Employee Contact:
 Name: _____ Phone: _____ email: _____
4. Consultant / Contractor Name: _____
 Address: _____ Phone: _____ email: _____
5. Mark Type of Contract (X): Professional Services: _____ Construction: _____ Commodities: _____ Technology: _____
6. Statement of Contract Goal / Purpose: _____

7. Policy Objective: _____
8. Actual or Estimated Notice To Proceed (NTP) Date: _____
9. Estimated Date of Completion: _____
10. Resolution # : _____ Resolution Date: _____
11. Location of the Contract Documents: _____

THIS PORTION MUST BE COMPLETED BY THE AGENCY / DEPARTMENT AND/OR THE PROJECT MANAGER:

Insert language below regarding the evaluation of performance and/or audit requirements. For example; This contract is subject to an independent audit initiated by the City of Oakland and/or this contract will be evaluated quarterly according to the deliverables defined below. Please attach separate sheets if required.

Performance, Inspection, Fiscal Reporting and Audit Requirements	
Performance Evaluation:	_____
Inspection Requirement:	_____
Fiscal Reporting Requirement:	_____
Audit Requirement:	_____

#	Deliverables	Date Due	Completion Date	Responsible Source (Prime, Sub, Supplier, Other)	Performance Level
1	_____	_____	_____	_____	_____
2	_____	_____	_____	_____	_____
3	_____	_____	_____	_____	_____

Consultant / Contractor: _____ <p align="center"><small>(Please Print)</small></p> Consultant / Contractor: Signature: _____	Date: _____
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City Representative: _____ <p align="center"><small>(Please Print)</small></p> City Representative Signature: _____	Date: _____
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*** Must be attached to the signed Contract / Agreement**