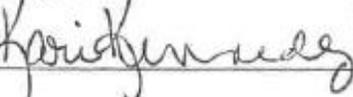


STANDARD OPERATING PROCEDURES

SOP Name/Title: CPO Approval Procedure		
SOP Originator: Karl Kennedy	Approval Authority: Fran McAskill	Effective Date:
Signature: 	Signature: 	Last Revised Date: 1/6/2014

Purpose: This Standard Operating Procedure (S O P) provides general information and instructions for receiving, approving, and completing a Consultant Purchase Order (C P O) from a Division.

Step	Action – Procedure
1	When a C P O request is received, verify the criteria submitted by the Division on the document labeled "C S A Approval".
1a	To qualify as a C P O, the Consultant's Fee/Services must be under \$50,000 and the construction cost must be under \$250,000.
1b	Verify the consultants' name, project name, construction cost (if applicable), consultants' fee, and Master Consultant Agreement Number is consistent with documentation submitted by the Division.
2	Review the scope of services/scope of work, tasks (if applicable), and compensation documentation submitted by the consultant thru the Division to verify the information is reasonable and logical. Verify in the scope of services/scope of work the C P O is not a 2nd "phase" of a specific project that has already been processed through a previous C P O.
3	Review the consultant justification form labeled as "Selection Procedure for Consultants with Continuing Contracts". This form will be submitted by the Division and will include all of the steps for elevating and selecting the consultant.
3a	Verify the division, the division director, and scope are correct and consistent with documentation submitted by the division.
3b	In Step.1, 'Review current list of Master Consulting Agreements': Verify all of the consultants that are currently under contract for the designated Master Consultant Agreement are listed with their address, if they are local or not, and if they are elevated for consideration. Ensure all columns are completed.
3c	In Step 2, 'Review list for appropriate expertise, experience, and personnel': Verify all consultants have been elevated from Step 1. Ensure all columns are completed. Verify every consultant has been named in the

	justification section as either elevated or not elevated and an explanation validating the decision has been provided.
3d	In Step 3, 'Past Performance on Similar Projects Satisfactory': Verify the consultants that were marked as "Y" for elevation in Step 2 have been brought down to Step 3. The consultants that were not elevated to Step 3 do not need to be listed. Ensure all columns are completed. Verify the consultant(s) that are not being elevated to Step 4 are named in the justification section and an explanation validating the decision has been provided.
3e	In Step 4, '24 Month Total Contract Value': Verify the consultants that were marked as "Y" for elevation in Step 3 have been brought down to Step 4. The consultants that were not elevated to Step 4 do not need to be listed. Ensure all columns are completed. Verify the consultant(s) that are not selected are named in the justification section and an explanation validating the decision has been provided.
3f	In Step 5, 'Meets Needs of Project Scope, Assigned Professional, Location, Special Needs of Project, Sub-Consultant': Verify the selected consultant with the 'CSA Approval' document and documentation submitted by division. Ensure all columns are completed. If the selected consultant was not the lowest dollar contract value identified in Step 4, the 'Special Needs' justification must be completed and an explanation validating the decision has been provided.
3g	In Step 6, 'Verify Proposed Scope Consistent with Scope of Services': Verify the division director or county project manager has validated the scope of services.
3h	In Step 7, 'Fee Proposal Fair and Reasonable': Verify the division director or county project manager has validated the fees are fair and reasonable.
4	If the information provided on the justification form is accurate and complete, complete the 'Purchasing Division' Section on the document labeled 'C S A Approval'.
4a	Complete the 'Date Received'; 'Date Reviewed'; and initial on the 'Date Reviewed' line.
4b	Place the entire document into the Specialists red return folder and give to the Procurement-Manager for review and approval. The Procurement Manager will approve and give to the Procurement Director for final approval. The Procurement Director will return the approved C P O to the Specialist.
5	After approval signatures have been obtained, assign a C P O Number using the C P O Logs provided in the Annual Bid Drive under 'Consultant Services'. The C P O Number will be in the format: C P O- (Master Agreement Number)- (Capital Letter Corresponding with the Log). e.g. C P O-11-17 F. Ensure the C P O Log is completed.
6	Return a copy of the approved C P O to the division. Procurement will keep the original.

7	Scan the approved C P O and upload into Novatus following instructions provided in the Novatus User Manual. Ensure all event and evaluation alerts and notifications have been set-up in Novatus.
7a	If a C P O project has a duration of 30 days or under, use your discretion on the number of days prior to the completion date for the 1st evaluation event alert, with an escalation of 7 days out from the completion date; and a 2nd evaluation event alert of 14 days from the escalation date on the 1st event alert.
7a	If a C P O project has a duration of 60 days or under, the 1st evaluation event alert will be 7 days out from the estimated completion date, with an escalation of 14 days from the completion date; and a 2nd event alert 7 days from the escalation date on the 1st event alert.
7b	If a C P O project has a duration greater than 60 days and no more than 6 months, the 1st evaluation alert will be 7 days out from the estimated completion date, with an escalation of 14 days from the completion date; and a 2nd event alert 7 days from the escalation date on the 1st event alert.
7c	If a C P O project has a duration greater than 6 months, an interim evaluation alert should be created for the 1st evaluation alert will be 7 days out from the estimated halfway point (e.g.: 12month project should have interim evaluation at 6 months), with an escalation of 14 days from the halfway date; and a 2nd event alert 7 days from the escalation date on the 1st event alert.
7d	If a C P O project has a duration greater than 6 months, a final evaluation alert should be created for the 1st evaluation alert will be 7 days out from the completion date, with an escalation of 14 days from the completion date; and a second event alert 7 days from the escalation date on the 1st final evaluation event alert.
8	While accessing Novatus, verify the consultants Certificate of Insurance (C O I) is current. The C O I for C P O will be covered under the Master Agreement. If the C O I is not current, contact the consultant to request a current C O I to place on file.
9	When the Division has emailed the Specialist the Notice To Proceed (N T P) for the C P O, scan the N T P and upload into Novatus following the instructions provided in the Novatus User Manual.
10	The Division will submit a requisition in Oracle to the Specialist for approval. Verify the requisition has the completed and approved C P O attached. If the requisition does not have the C P O attached or if the requisition is not completed according to the instructions in the Oracle User Manual, return it to the Division. If the requisition is correct, approve.
10a	Once the requisition has been approved and converted to a Purchase Order, the C P O information will need to be logged into an Excel spreadsheet labeled "Consultant Summary Sheet". This spreadsheet is located on the Annual Bid Drive under 'Consultant Services'

11	The 'Consultant Summary Sheet' is divided by divisions on the bottom tabs. Click on the applicable divisions tab; log in the C P O information with the date, the basis of the award, and fee. under the applicable consultant.
11a	File a hard copy of the completed and approved C P O in the middle drawers in the Procurement main area.
12	The C P O will be filed according to the Master Agreement Number. Search for the Master Agreement Number; a separate folder should be behind the Master Agreement folder containing all C P O's. File as applicable.
13	When a notification for an expiration alert has been received by the Specialist from Novatus indicating the C P O is expiring, verify with the division the services are going to be completed on schedule, or does the expiration date need to be extended
14	When the division has notified the Specialist the C P O services have been completed and a final evaluation has been submitted by the division, the C P O status will need to be marked as 'completed' and all open event alerts need to be completed.
14a	If the division has notified the Specialist the C P O services need to be extended, the Wizard needs to be ran to extend the expiration date for the number of days the division has advised them. The evaluation event date will also need to be changed.