



AGENDA
CUYAHOGA COUNTY FINANCE & BUDGETING COMMITTEE MEETING
MONDAY, JULY 10, 2023
CUYAHOGA COUNTY ADMINISTRATIVE HEADQUARTERS
C. ELLEN CONNALLY COUNCIL CHAMBERS – 4TH FLOOR
1:00 PM

Committee Members:

Dale Miller, Chair – District 2
Scott Tuma, Vice Chair – District 4
Pernel Jones, Jr. – District 8
Michael J. Gallagher – District 5
Jack Schron, Jr. – District 6
Patrick Kelly – District 1
Meredith M. Turner – District 9

- 1. CALL TO ORDER**
- 2. ROLL CALL**
- 3. PUBLIC COMMENT**
- 4. APPROVAL OF MINUTES FROM THE JUNE 12, 2023 MEETING**
- 5. MATTERS REFERRED TO COMMITTEE**
 - a) R2023-0202: A Resolution making awards on RQ11388 to various appraisers in the total amount not-to-exceed \$2,548,538.00 for various real estate review and appraisal services in connection with the 2024 Sexennial Reappraisal, effective upon signature of all parties through 12/31/2024; authorizing the County Executive to execute the Master Contract and all other documents consistent with said awards and this Resolution; and declaring the necessity that this Resolution become immediately effective:
 - 1) Contract No. 3442 with Abrams, Robert in the anticipated amount not-to-exceed \$86,901.44.
 - 2) Contract No. 3443 with Alder Appraisal (Green, Jennifer) in the anticipated amount not-to-exceed \$66,695.06.

- 3) Contract No. 3444 with Andrews, John in the anticipated amount not-to-exceed \$66,694.91.
- 4) Contract No. 3445 with Blaze, Lana in the anticipated amount not-to-exceed \$66,694.91.
- 5) Contract No. 3446 with Butler, Mark in the anticipated amount not-to-exceed \$66,694.91.
- 6) Contract No. 3447 with Carey, Richard in the anticipated amount not-to-exceed \$66,694.91.
- 7) Contract No. 3448 with Chervenak, Ronald Jr. in the anticipated amount not-to-exceed \$66,694.91.
- 8) Contract No. 3449 with Conte, Gregory in the anticipated amount not-to-exceed \$66,694.91.
- 9) Contract No. 3450 with Curran, Patrick in the anticipated amount not-to-exceed \$66,694.91.
- 10) Contract No. 3451 with Del Appraisal Services, Inc. (DeLisio, Brian) in the anticipated amount not-to-exceed \$66,694.91.
- 11) Contract No. 3452 with Furukawa, Amy in the anticipated amount not-to-exceed \$66,694.91.
- 12) Contract No. 3453 with David Harmon & Associates (Harmon, David) on Time Appraisal Services in the anticipated amount not-to-exceed \$66,694.91.
- 13) Contract No. 3454 with Harmon, David Jr. in the anticipated amount not-to-exceed \$66,694.91.
- 14) Contract No. 3455 with Hogan, Thomas P. in the anticipated amount not-to-exceed \$66,694.91.
- 15) Contract No. 3528 with Horton, Edward in the anticipated amount not-to-exceed \$86,901.46.
- 16) Contract No. 3456 with Jackson, Donna M. in the anticipated amount not-to-exceed \$66,694.91.
- 17) Contract No. 3457 with Jackson, Tim in the anticipated amount not-to-exceed \$86,901.46.

- 18) Contract No. 3458 with Junior Holdings, LLC (Salvatore, Lawrence) in the anticipated amount not-to-exceed \$66,694.91.
- 19) Contract No. 3459 with Kapusi, Christina in the anticipated amount not-to-exceed \$66,694.91.
- 20) Contract No. 3460 with Kinczel, Paul in the anticipated amount not-to-exceed \$66,694.91.
- 21) Contract No. 3461 with Koz, John in the anticipated amount not-to-exceed \$66,694.91.
- 22) Contract No. 3462 with Lassiter, Ruth in the anticipated amount not-to-exceed \$66,694.91.
- 23) Contract No. 3463 with Latitude Appraisals, LLC (Labatte, Faith) in the anticipated amount not-to-exceed \$66,694.91.
- 24) Contract No. 3464 with Lenehan, John in the anticipated amount not-to-exceed \$66,694.91.
- 25) Contract No. 3465 with Levering, Wayne F. in the anticipated amount not-to-exceed \$86,901.46.
- 26) Contract No. with 3466 Loftus, Christopher J. in the anticipated amount not-to-exceed \$66,694.91.
- 27) Contract No. 3467 with Mamer, Bruce J. in the anticipated amount not-to-exceed \$66,694.91.
- 28) Contract No. 3468 with McLaughlin, Paul in the anticipated amount not-to-exceed \$66,694.91.
- 29) Contract No. 3469 with Neal, Maria in the anticipated amount not-to-exceed \$66,694.91.
- 30) Contract No. 3470 with Patriski, Stan in the anticipated amount not-to-exceed \$66,694.91.
- 31) Contract No. 3471 with Patriski-Roff Andrea in the anticipated amount not-to-exceed \$66,694.91.
- 32) Contract No. 3472 with Pattie, Debra in the anticipated amount not-to-exceed \$66,694.91.
- 33) Contract No. 3473 with Rocco, Daniel in the anticipated amount not-to-exceed \$66,694.91.

34) Contract No. 3474 with Sarkisian, Kristin in the anticipated amount not-to-exceed \$66,694.91.

35) Contract No. 3475 with TMW Appraisals (Weinberg, Thomas) in the anticipated amount not-to-exceed \$66,694.91.

36) Contract No. 3476 with Ward, David in the anticipated amount not-to-exceed \$66,694.91.

37) Contract No. 3477 with Williams, Crystal in the anticipated amount not-to-exceed \$66,694.91.

6. MISCELLANEOUS BUSINESS

7. ADJOURNMENT

**Complimentary parking for the public is available in the attached garage at 900 Prospect. A skywalk extends from the garage to provide additional entry to the Council Chambers from the 5th floor parking level of the garage. Please see the Clerk to obtain a complimentary parking pass.*

***Council Chambers is equipped with a hearing assistance system. If needed, please see the Clerk to obtain a receiver.*



MINUTES

CUYAHOGA COUNTY FINANCE & BUDGETING COMMITTEE MEETING

MONDAY, JUNE 12, 2023

CUYAHOGA COUNTY ADMINISTRATIVE HEADQUARTERS

C. ELLEN CONNALLY COUNCIL CHAMBERS – 4TH FLOOR

1:00 PM

1. CALL TO ORDER

Chairman Miller called the meeting to order at 1:14 p.m.

2. ROLL CALL

Mr. Miller asked Deputy Clerk Carter to call the roll. Committee members Miller, Tuma, Gallagher and Schron were in attendance and a quorum was determined. Committee members Turner and Jones entered the meeting after the roll was taken. Committee member Kelly was absent from the meeting. Councilmember Conwell was also in attendance.

3. PUBLIC COMMENT

There were no public comments given.

4. APPROVAL OF MINUTES FROM THE JUNE 5, 2023 MEETING

A motion was made by Mr. Tuma, seconded by Mr. Schron and approved by unanimous vote to approve the minutes from the June 5, 2023 meeting.

5. MATTERS REFERRED TO COMMITTEE

- a) R2023-0156: A Resolution amending the 2022/2023 Biennial Operating Budget for 2023 by providing for additional fiscal appropriations from the General Fund and other funding sources, for appropriation transfers between budget accounts and for cash transfers between budgetary funds, to meet the budgetary needs of various County departments, offices and agencies; and declaring the necessity that this Resolution become immediately effective.

Mr. Miller read a statement regarding Resolution No. R2023-0156.

Mr. Walter Parfejewiec, Director of the Office of Budget and Management; Mr. Anthony Perlatti, Director of the Board of Elections; and The Honorable Bride Rose Sweeney, State Representative for Ohio House District 16, addressed the Committee regarding Resolution No. R2023-0156. Discussion ensued.

Committee members asked questions of Mr. Parfejewiec, Mr. Perlatti and Representative Sweeney pertaining to the item, which they answered accordingly.

On a motion by Mr. Miller with a second by Mr. Tuma, Resolution No. R2023-0156 was considered and approved by unanimous vote to be referred to the full Council agenda with a recommendation for passage under second reading suspension of the rules.

6. MISCELLANEOUS BUSINESS

There was no miscellaneous business.

7. ADJOURNMENT

With no further business to discuss and a on motion by Ms. Turner with a second by Mr. Tuma, the meeting was adjourned at 2:03 p.m., without objection.

County Council of Cuyahoga County, Ohio

Resolution No. R2023-0202

Sponsored by: County Executive Ronayne/Fiscal Officer	A Resolution making awards on RQ11388 to various appraisers in the total amount not-to-exceed \$2,548,538.00 for various real estate review and appraisal services in connection with the 2024 Sexennial Reappraisal, effective upon signature of all parties through 12/31/2024; authorizing the County Executive to execute the Master Contract and all other documents consistent with said awards and this Resolution; and declaring the necessity that this Resolution become immediately effective.
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WHEREAS, the County Executive/Fiscal Department recommends awards on RQ11388 to various appraisers in the total amount not-to-exceed \$2,548,538.00 for various real estate review and appraisal services in connection with the 2024 Sexennial Reappraisal, effective upon signature of all parties through 12/31/2024; and

WHEREAS, this reappraisal process is intended to field review, verify physical characteristics of, and value the physical inventory for approximately 396,903 residential and manufactured home parcels. Also included in the reappraisal process is the review, verification of physical characteristics of and valuation of 25,000 commercial and industrial classed parcels and 860 heavy industrial parcels; and

WHEREAS, the Fiscal Officer ranked the appraisers based upon their qualifications and experience and has made the following recommendations for awarding contracts to the following individual independent contractors:

- a) Contract No. 3442, Robert Abrams, in the anticipated amount not-to-exceed \$86,901.44;
- b) Contract No. 3443 Alder Appraisal (Jennifer Green) in the anticipated amount not-to-exceed \$66,695.06;
- c) Contract No. 3444, John Andrews, in the anticipated amount of \$66,694.91;
- d) Contract No. 3445, Lana Blaze, in the anticipated amount of \$66,694.91;
- e) Contract No. 3446, Mark Butler, in the anticipated amount of \$66,694.91;
- f) Contract No. 3447, Richard Carey, in the anticipated amount of \$66,694.91;

- g) Contract No. 3448, Ronald Chervenak Jr., in the anticipated amount of \$66,694.91;
- h) Contract No. 3449, Gregory Conte, in the anticipated amount of \$66,694.91;
- i) Contract No. 3450, Patrick Curran, in the anticipated amount of \$66,694.91;
- j) Contract No. 3451, Del Appraisal Services, Inc., (Brian DeLisio) in the anticipated amount of \$66,694.91;
- k) Contract No. 3452, Amy Furukawa, in the anticipated amount of \$66,694.91;
- l) Contract No. 3453 David Harmon & Associates (David Harmon) on Time Appraisal Services in the anticipated amount of \$66,694.91;
- m) Contract No. 3454, David Harmon Jr., in the anticipated amount of \$66,694.91;
- n) Contract No. 3455, Thomas P. Hogan, in the anticipated amount of \$66,694.91;
- o) Contract No. 3528, Edward Horton, in the anticipated amount of \$86,901.46;
- p) Contract No. 3456, Donna M. Jackson, in the anticipated amount of \$66,694.91;
- q) Contract No. 3457, Tim Jackson, in the anticipated amount of \$86,901.46;
- r) Contract No. 3458, Junior Holdings, LLC (Lawrence Salvatore) in the anticipated amount of \$66,694.91;
- s) Contract No. 3459, Christina Kapusi, in the anticipated amount of \$66,694.91;
- t) Contract No. 3460, Paul Kinzel, in the anticipated amount of \$66,694.91;
- u) Contract No. 346, Jon Koz, in the anticipated amount of \$66,694.91;
- v) Contract No. 3462, Ruth Lassiter, in the anticipated amount of \$66,694.91;
- w) Contract No. 3463 Latitude Appraisals, LLC (Faith Labatte) in the anticipated amount of \$66,694.91;
- x) Contract No. 3464, John Lenehan, in the anticipated amount of \$66,694.91;
- y) Contract No. 3465, Wayne F. Levering, in the anticipated amount of \$86,901.46;
- z) Contract No. 3466, Christopher J. Loftus, in the anticipated amount of \$66,694.91;
- aa) Contract No. 3467, Bruce J. Mamer, in the anticipated amount of \$66,694.91;
- bb) Contract No. 3468, Paul McLaughlin, in the anticipated amount of \$66,694.91;
- cc) Contract No. 3469, Maria Neal, in the anticipated amount of \$66,694.91;

- dd) Contract No. 3470, Stan Patriski, in the anticipated amount of \$66,694.91;
- ee) Contract No. 3471, Andrea Patriski-Roff, in the anticipated amount of \$66,694.91;
- ff) Contract No. 3472, Debra Pattie, in the anticipated amount of \$66,694.91;
- gg) Contract No. 3473, Daniel Rocco, in the anticipated amount of \$66,694.91;
- hh) Contract No. 3474, Kristin Sarkisian, in the anticipated amount of \$66,694.91;
- ii) Contract No. 3475, TMW Appraisals (Thomas Weinberg) in the anticipated amount of \$66,694.91;
- jj) Contract No. 3476, David Ward, in the anticipated amount of \$66,694.91;
- kk) Contract No. 3477, Crystal Williams, in the anticipated amount of \$66,694.91; and

WHEREAS, this project is funded 100% by Real Estate Assessment Fund; and

WHEREAS, it is necessary that this Resolution become immediately effective in order that critical services provided by Cuyahoga County can continue and to provide for the usual, daily operation of a County entity.

NOW, THEREFORE, BE IT RESOLVED BY THE COUNTY COUNCIL OF CUYAHOGA COUNTY, OHIO:

SECTION 1. That the Cuyahoga County Council hereby makes awards on RQ11388 to various appraisers in the total amount not-to-exceed \$2,548,538.00 for various real estate review and appraisal services in connection with the 2024 Sexennial Reappraisal, effective upon signature of all parties through 12/31/2024 as follows:

- a) Contract No. 3442, Robert Abrams, in the anticipated amount not-to-exceed \$86,901.44;
- b) Contract No. 3443 Alder Appraisal (Jennifer Green) in the anticipated amount not-to-exceed \$66,695.06;
- c) Contract No. 3444, John Andrews, in the anticipated amount of \$66,694.91;
- d) Contract No. 3445, Lana Blaze, in the anticipated amount of \$66,694.91;
- e) Contract No. 3446, Mark Butler, in the anticipated amount of \$66,694.91;
- f) Contract No. 3447, Richard Carey, in the anticipated amount of \$66,694.91;
- g) Contract No. 3448, Ronald Chervenak Jr., in the anticipated amount of \$66,694.91;

- h) Contract No. 3449, Gregory Conte, in the anticipated amount of \$66,694.91;
- i) Contract No. 3450, Patrick Curran, in the anticipated amount of \$66,694.91;
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- k) Contract No. 3452, Amy Furukawa, in the anticipated amount of \$66,694.91;
- l) Contract No. 3453 David Harmon & Associates (David Harmon) on Time Appraisal Services in the anticipated amount of \$66,694.91;
- m) Contract No. 3454, David Harmon Jr., in the anticipated amount of \$66,694.91;
- n) Contract No. 3455, Thomas P. Hogan, in the anticipated amount of \$66,694.91;
- o) Contract No. 3528, Edward Horton, in the anticipated amount of \$86,901.46;
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- cc) Contract No. 3469, Maria Neal, in the anticipated amount of \$66,694.91;
- dd) Contract No. 3470, Stan Patriski, in the anticipated amount of \$66,694.91;

- ee) Contract No. 3471, Andrea Patriski-Roff, in the anticipated amount of \$66,694.91;
- ff) Contract No. 3472, Debra Pattie, in the anticipated amount of \$66,694.91;
- gg) Contract No. 3473, Daniel Rocco, in the anticipated amount of \$66,694.91;
- hh) Contract No. 3474, Kristin Sarkisian, in the anticipated amount of \$66,694.91;
- ii) Contract No. 3475, TMW Appraisals (Thomas Weinberg) in the anticipated amount of \$66,694.91;
- jj) Contract No. 3476, David Ward, in the anticipated amount of \$66,694.91;
- kk) Contract No. 3477, Crystal Williams, in the anticipated amount of \$66,694.91; and

SECTION 2. That the County Executive is authorized to execute the Master Contract and all other documents consistent with said awards and this Resolution.

SECTION 3. It is necessary that this Resolution become immediately effective for the usual daily operation of the County; the preservation of public peace, health and safety in the County; and any additional reasons set forth in the preamble. Provided that this Resolution receives the affirmative vote of at least eight members of Council, it shall take effect and be in force immediately upon the earliest occurrence of any of the following: (1) its approval by the County Executive through signature, (2) the expiration of the time during which it may be disapproved by the County Executive under Section 3.10(6) of the Cuyahoga County Charter, or (3) its passage by at least eight members of Council after disapproval pursuant to Section 3.10(7) of the Cuyahoga County Charter. Otherwise, it shall take effect and be in force from and after the earliest period allowed by law.

SECTION 4. It is found and determined that all formal actions of this Council relating to the adoption of this Resolution were adopted in an open meeting of the Council, and that all deliberations of this Council and of any of its committees that resulted in such formal action were in meetings open to the public, in compliance with all legal requirements, including Section 121.22 of the Ohio Revised Code.

On a motion by _____, seconded by _____, the foregoing Resolution was duly adopted.

Yeas:

Nays:

County Council President

Date

County Executive

Date

Clerk of Council

Date

First Reading/Referred to Committee: July 6, 2023
Committee(s) Assigned: Finance & Budgeting

Journal _____
_____, 20____

OnBase Item Detail Briefing Memo - Form

Directions: Use the following form when requesting approval of a contract, agreement, an amendment, lease, permits, or grants involving the County.

Enter this information directly or paste (text) into the sections below.

Complete all items within the (parenthesis – **Note: Do not include Parenthesis**) then attach the following information as a Word Document to the OnBase item.

Title:

Fiscal Department/Appraisal; RQ#11388 2024 Sexennial Reappraisal Master Contract

A. Scope of Work Summary

1. Fiscal department is requesting approval of the 2024 Sexennial Master Contract for appraiser contractors, who will conduct the reappraisal of parcels to begin effective upon approval of the full master contract until 12/31/2024 for the anticipated cost not to exceed \$2,548,538.00.

If the Project is not new to the County List the Prior Board Approval Number or Resolution Number. R2017-0177

Describe the exact services being provided. The anticipated start-completion dates are effective upon approval of entire masters until 12/31/2024. Cuyahoga County will contract with licensed real estate appraisers to conduct a county-wide reappraisal on all residential, manufactured homes, commercial and industrial parcels.

2. The primary goals of the project are (list 2 to 3 goals).

The primary goals are to conduct an appraisal on all the parcels within Cuyahoga County and prepare the information to submit to the State.

3. The project is mandated by (provide the ORC statute with section

ORC Section 5715.33 of the Ohio Revised code requires the County wide reappraisal every six years.

B. Procurement

1. The procurement method for this project was RFQ. The total value of the RFQ is \$2,548,538.00

2.The RFQ closed on 1/5/2023. There is not an SBE or DBE participation/goal.

3. There were #47 bids pulled from OPD, #47 bids submitted for review, #37 bids approved.

C. Contractor and Project Information

1. The address(es) of all vendors and/or contractors is (provide the full address in the following format):

Abrams, Robert 13930 Quail Oval North Royalton, Ohio 44130	Alder Appraisal 7669 Webster Road Middleburg Heights, Ohio 44130
Andrews, John 31360 Marvis Drive Bay Village, Ohio 44140	Blaze, Lana P.O. Box 31833 Independence, Ohio 44131
Butler, Mark 5900 Parkridge Ave Cleveland, Ohio 44131	Carey, Richard 14504 Birchwood Ave Cleveland, Ohio 44111
Chervenak, Ronald Jr. P.O. Box 770049 Lakewood, Ohio 44107	Conte, Gregory 5720 Cumberland Drive Garfield, Heights, Ohio 44125
Curran, Patrick 721 Sawmill Drive Avon Lake, Ohio 44012	Del Appraisal Services, Inc. (DeLisio, Brian) 35885 Brushwood Drive Solon, Ohio 44139
Furukawa, Amy 4194 Rusticwood Trail Richfield, Ohio 44286	Harmon & Assoc on Time Appraisal Services (Harmon, David Sr.) 12807 Larchmere Boulevard #2 Shaker Heights, Ohio 44120
Harmon, David Jr. 13800 Fairhill Road Suite 320 Shaker Heights, Ohio 44120	Hogan, Thomas P 6288 Old Virginia Lane Parma Heights, Ohio 44130
Horton, Edward 3674 Rolliston Road Shaker Heights, Ohio 44120	Jackson, Donna M. 11384 S. Forest Drive Concord Township, Ohio 44077
Jackson, Timothy 850 Euclid Ave Suite 952 Cleveland, Ohio 44114	Junior Holdings, LLC (Salvatore, Lawrence) 250 Heather Court Mayfield Heights, Ohio 44124
Kapusi, Christina 8536 Timber Trail Brecksville, Ohio 44141	Kinczel, Paul 827 Stanwell Drive Highland Heights, Ohio 44143
Koz, John 28929 Lincoln Road Bay Village, Ohio 44140	Lassiter, Ruth 12800 Snowville Road Brecksville, Ohio 44141
Latitude Appraisals, LLC (Labatte, Faith) P.O. Box 40352 Bay Village, Ohio 44140	Lenahan, John 16517 St. Anthony Lane Cleveland, Ohio 44111
Levering, Wayne F 1449 Chagrin River Road P.O. Box 311 Gates Mills, Ohio 44040	Loftus, Christopher J 15724 Norway Avenue Cleveland, Ohio 44111

Mamer, Bruce J P. O. Box 937 Medina, Ohio 44258	McLaughlin, Paul 5488 Strathaven Drive Highland Heights, Ohio 44143
Neal, Maria 6151 Center Street #103 Mentor, Ohio 44060	Patriski, Stan 6679 Big Creek Parkway Middleburg Heights, Ohio 44130
Patriski-Roff Andrea 7845 Montgomery Road Middleburgh Heights, Ohio 44130	Pattie, Debra 7076 Elizabeth Court Mentor, Ohio 44060
Rocco, Daniel 2948 Meadow Lane Westlake, Ohio 44145	Sarkisian, Kristin 10700 Lake Avenue Cleveland, Ohio 44102
TMW Appraisals (Weinberg, Thomas) 2333 Brigadoon Court Westlake, Ohio 44145	Ward, David 18560 Meadow Lane Strongsville, Ohio 44136
Williams, Crystal 1097 E 168th Street Cleveland, Ohio 44110	

3.b. [*When applicable*] The project is County wide.

D. Project Status and Planning

1. The project reoccurs every six years

E. Funding

1. The project is funded Real Estate Assessment fund
2. The schedule of payments is to be paid per book completed.

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3442

(1 of 37) Abrams, Robert

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION			
Formal RFQ			
Reviewed by Purchasing			
		Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)		DT	OK
Bid Specification Packet		DT	OK
Final DEI Goal Setting Worksheet		DT	OK
Diversity Documents – <i>if required (goal set)</i>		N/A	N/A
Award Letter (sent to awarded vendor)		DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>		N/A	N/A
Tabulation Sheet		DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).		DT	OK
IG#	23-0102-REG	DT	OK
Debarment/Suspension Verified	Date: 5/25/23	DT	OK
Auditor’s Finding	Date: 5/25/23	DT	OK
Vendor’s Submission		DT	OK
Independent Contractor (I.C.) Requirement	Date: 3/23/23 6/16/2023	DT	OK
Cover - <i>Master contracts only</i>		DT	OK
Contract Evaluation – <i>if required</i>		N/A	N/A
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.		N/A	N/A
Checklist Verification		DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
	Department initials

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.44
1/1/2024-12/31/2024	FS305100	55130			\$37,500.00
			TOTAL		\$86,901.44

CONTRACT HISTORY (to be completed by department)

CE/AC# (if applicable)		N/A			
Infor/Lawson PO# and PO Code (if applicable)					
Lawson RQ# (if applicable)					
CM Contract#					
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$				
	Prior Amendment Amounts (list separately)	\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$				

PURCHASING USE ONLY

Prior Resolutions	
CM#:	3442
Vendor Name:	Abrams, Robert

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$86,901.44mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/23/2023: 1 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3443

(2 of 37) Alder Appraisal

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION				
Formal RFQ				
Reviewed by Purchasing				
			Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)			DT	OK
Bid Specification Packet			DT	OK
Final DEI Goal Setting Worksheet			DT	OK
Diversity Documents – <i>if required (goal set)</i>			N/A	N/A
Award Letter (sent to awarded vendor)			DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>			N/A	N/A
Tabulation Sheet			DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators.</i>)			DT	OK
IG#	23-0073-REG		DT	OK
Debarment/Suspension Verified	Date:	5/25/23	DT	OK
Auditor’s Finding	Date:	5/26/23 6/16/2023	DT	OK (Green completed by Department of Purchasing)
Vendor’s Submission			DT	OK
Independent Contractor (I.C.) Requirement	Date:	3/6/23	DT	OK
Cover - <i>Master contracts only</i>			DT	OK
Contract Evaluation – <i>if required</i>			N/A	N/A
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.			N/A	N/A
Checklist Verification			DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

	Department initials
Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.60
			TOTAL		\$66,695.06

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		N/A			
Infor/Lawson PO# and PO Code (if applicable)					
Lawson RQ# (if applicable)					
CM Contract#					
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$				
	Prior Amendment Amounts (list separately)	\$			
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$				

PURCHASING USE ONLY

Prior Resolutions	
CM#:	3443

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Vendor Name:	Alder Appraisal (Green, Jennifer)
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,695.06mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/23/2023: 2 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3444

(3 of 37) Andrews, John

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION			
Formal RFQ			
Reviewed by Purchasing			
		Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)		DT	OK
Bid Specification Packet		DT	OK
Final DEI Goal Setting Worksheet		DT	OK
Diversity Documents – <i>if required (goal set)</i>		N/A	N/A
Award Letter (sent to awarded vendor)		DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>		N/A	N/A
Tabulation Sheet		DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators.</i>)		DT	OK
IG#	23-0070-REG	DT	OK
Debarment/Suspension Verified	Date: 5/25/23	DT	OK
Auditor’s Finding	Date: 5/26/23	DT	OK
Vendor’s Submission		DT	OK
Independent Contractor (I.C.) Requirement	Date: 3/3/23	DT	OK (revised uploaded 6/14/2023)
Cover - <i>Master contracts only</i>		DT	OK
Contract Evaluation – <i>if required</i>		N/A	OK (uploaded 6/14/2023)
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.		N/A	N/A
Checklist Verification		DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
	Department initials

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700191			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		AU-17-39790			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/17/2017-12/31/2018 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$0.00	10/1/2017-12/31/2018	12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$0.00			
Total Contact Amount	\$48,277.00				

PURCHASING USE ONLY

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Prior Resolutions	BC2018-873, R2017-0177
CM#:	3444
Vendor Name:	Andrews, John
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK397
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/20/2023: Reviewed – will be approved once all 37 actions for this master contract are approved 6/14/2023: Vendor must check once of the boxes on the Independent Contractor Form, attach revised; attach prior contract evaluation; attach revised checklist with complete contract history of prior contract/approval 6/13/2023: 3 of 37
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3445

(4 of 37) Blaze, Lana

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION			
Formal RFQ			
Reviewed by Purchasing			
		Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)		DT	OK
Bid Specification Packet		DT	OK
Final DEI Goal Setting Worksheet		DT	OK
Diversity Documents – <i>if required (goal set)</i>		N/A	N/A
Award Letter (sent to awarded vendor)		DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>		N/A	N/A
Tabulation Sheet		DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).		DT	OK
IG#	21-0315-REG	DT	OK
Debarment/Suspension Verified	Date: 5/25/23	DT	OK
Auditor’s Finding	Date: 5/26/23	DT	OK
Vendor’s Submission		DT	OK
Independent Contractor (I.C.) Requirement	Date: 3/21/23	DT	OK
Cover - <i>Master contracts only</i>		DT	OK
Contract Evaluation – <i>if required</i>		N/A	OK (attached 6/14/2023)
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.		N/A	N/A
Checklist Verification		DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
	Department initials

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700192			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		AU-17-39790			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/17/17-12/31/17 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$6,022.75	10/1/2017-12/31/2018	12/3/18	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$54,299.75				

PURCHASING USE ONLY

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Prior Resolutions	BC2018-873, R2017-0177
CM#:	3445
Vendor Name:	Blaze, Lana
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/15/2023: Reviewed – will be approved once all 37 actions for this master contract are approved 6/14/2023: 4 of 37; Attach prior contract evaluation
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3446

(5 of 37) Butler, Mark

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION Formal RFQ Reviewed by Purchasing

	Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)	DT	OK
Bid Specification Packet	DT	OK
Final DEI Goal Setting Worksheet	DT	OK
Diversity Documents – <i>if required (goal set)</i>	N/A	N/A
Award Letter (sent to awarded vendor)	DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>	N/A	N/A
Tabulation Sheet	DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).	DT	OK
IG# 21-0336-REG	DT	OK
Debarment/Suspension Verified Date: 5/25/23	DT	OK
Auditor’s Finding Date: 5/26/23	DT	OK
Vendor’s Submission	DT	OK
Independent Contractor (I.C.) Requirement Date: 2/23/23	DT	OK
Cover - <i>Master contracts only</i>	DT	OK
Contract Evaluation – <i>if required</i>	N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.	N/A	N/A
Checklist Verification	DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700195			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/18 10/10/2017	R2017-0177
	Prior Amendment Amounts (list separately)	\$5,842.75	10/1/2017-12/31/18	12/3/18	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$54,119.75				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873
CM#:	3446

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Vendor Name:	Butler, Mark
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/14/2023: 7 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3447

(6 of 37) Carey, Richard

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION

Formal RFQ

Reviewed by Purchasing

	Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)	DT	OK
Bid Specification Packet	DT	OK
Final DEI Goal Setting Worksheet	DT	OK
Diversity Documents – <i>if required (goal set)</i>	N/A	N/A
Award Letter (sent to awarded vendor)	DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>	N/A	N/A
Tabulation Sheet	DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators.</i>)	DT	OK
IG# 23-0088-REG	DT	OK
Debarment/Suspension Verified Date: 5/25/23	DT	OK
Auditor’s Finding Date: 5/26/23	DT	OK
Vendor’s Submission	DT	OK
Independent Contractor (I.C.) Requirement Date: 3/4/23	DT	OK
Cover - <i>Master contracts only</i>	DT	OK
Contract Evaluation – <i>if required</i>	N/A	N/A
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.	N/A	N/A
Checklist Verification	DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		N/A			
Infor/Lawson PO# and PO Code (if applicable)					
Lawson RQ# (if applicable)					
CM Contract#					
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$				
	Prior Amendment Amounts (list separately)	\$			
		\$			
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$				

PURCHASING USE ONLY

Prior Resolutions	
CM#:	3447
Vendor Name:	Carey, Richard

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/15/2023: 6 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3448

(7 of 37) Chervenak, Ronald Jr.

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION Formal RFQ Reviewed by Purchasing
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		Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)		DT	OK
Bid Specification Packet		DT	OK
Final DEI Goal Setting Worksheet		DT	OK
Diversity Documents – <i>if required (goal set)</i>		N/A	N/A
Award Letter (sent to awarded vendor)		DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>		N/A	N/A
Tabulation Sheet		DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).		DT	OK
IG#	23-0100-REG (HABITAT APPRAISAL LTD)	DT	OK (IG confirmation attached 6/20/2023)
Debarment/Suspension Verified	Date: 5/25/23	DT	OK
Auditor’s Finding	Date: 5/26/23	DT	OK
Vendor’s Submission		DT	OK
Independent Contractor (I.C.) Requirement	Date: 4/6/23	DT	OK
Cover - <i>Master contracts only</i>		DT	OK
Contract Evaluation – <i>if required</i>		N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.		N/A	N/A
Checklist Verification		DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law
Department initials

Department of Purchasing – Required Documents Checklist

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Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700197			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$2,894.00	12/31/17	12/3/17	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$51,171.00				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
CM#:	3448
Vendor Name:	Chervenak, Ronald Jr.

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/20/2023: Reviewed – will be approved once all 37 actions for this master contract are approved 6/14/2023: 7 of 37; need confirmation of IG# referenced, e-mail to Domonique
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3449

(8 of 37) Conte, Gregory

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION

Formal RFQ

Reviewed by Purchasing

	Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)	DT	OK
Bid Specification Packet	DT	OK
Final DEI Goal Setting Worksheet	DT	OK
Diversity Documents – <i>if required (goal set)</i>	N/A	N/A
Award Letter (sent to awarded vendor)	DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>	N/A	N/A
Tabulation Sheet	DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).	DT	OK
IG# 20-0382-REG	DT	OK
Debarment/Suspension Verified Date: 5/25/23	DT	OK
Auditor’s Finding Date: 5/26/23	DT	OK
Vendor’s Submission	DT	OK
Independent Contractor (I.C.) Requirement Date: 3/9/23	DT	OK
Cover - <i>Master contracts only</i>	DT	OK
Contract Evaluation – <i>if required</i>	N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.	N/A	N/A
Checklist Verification	DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers' Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)					
Infor/Lawson PO# and PO Code (if applicable)					
Lawson RQ# (if applicable)					
CM Contract#					
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$664.50	10/1/2017-12/31/18	12/3/18	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$48,941.50				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
CM#:	3449

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Vendor Name:	Conte, Gregory
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/14/2023: 8 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3450

(9 of 37) Curran, Patrick

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION			
Formal RFQ			
Reviewed by Purchasing			
		Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)		DT	OK
Bid Specification Packet		DT	OK
Final DEI Goal Setting Worksheet		DT	OK
Diversity Documents – <i>if required (goal set)</i>		N/A	N/A
Award Letter (sent to awarded vendor)		DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>		N/A	N/A
Tabulation Sheet		DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).		DT	OK
IG#	23-0067-REG	DT	OK
Debarment/Suspension Verified	Date: 5/25/23	DT	OK
Auditor’s Finding	Date: 5/26/23	DT	OK
Vendor’s Submission		DT	OK
Independent Contractor (I.C.) Requirement	Date: 3/20/23 2/24/2023	DT	OK
Cover - <i>Master contracts only</i>		DT	OK
Contract Evaluation – <i>if required</i>		N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), <i>if required</i> .		N/A	N/A
Checklist Verification		DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
	Department initials

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700199			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-05/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$	10/1/2017-12/31/2018	12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$48,277.00				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
CM#:	3450

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Vendor Name:	Curran, Patrick
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/23/2023: 9 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3451

(10 of 37) Del Appraisal Services, INC

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION					
Formal RFQ					
Reviewed by Purchasing					
				Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)				DT	OK
Bid Specification Packet				DT	OK
Final DEI Goal Setting Worksheet				DT	OK
Diversity Documents – <i>if required (goal set)</i>				N/A	N/A
Award Letter (sent to awarded vendor)				DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>				N/A	N/A
Tabulation Sheet				DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).				DT	OK
IG#	23-0086-REG			DT	OK
Debarment/Suspension Verified	Date:	5/25/23		DT	OK
Auditor’s Finding	Date:	5/26/23		DT	OK
Vendor’s Submission				DT	OK
Independent Contractor (I.C.) Requirement	Date:	2/27/23		DT	OK
Cover - <i>Master contracts only</i>				DT	OK
Contract Evaluation – <i>if required</i>				N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.				N/A	N/A
Checklist Verification				DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
Agreement/Contract and Exhibits	Department initials DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700200			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$2,221.50	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$50,498.50				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

CM#:	3451
Vendor Name:	Del Appraisal Services (Delisio, Brian)
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/15/2023: 10 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3452

(11 of 37) Furukawa, Amy

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION			
Formal RFQ			
Reviewed by Purchasing			
		Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)		DT	OK
Bid Specification Packet		DT	OK
Final DEI Goal Setting Worksheet		DT	OK
Diversity Documents – <i>if required (goal set)</i>		N/A	N/A
Award Letter (sent to awarded vendor)		DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>		N/A	N/A
Tabulation Sheet		DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators.</i>)		DT	OK
IG#	23-0065-REG (AF HOME APPRAISAL)	DT	OK (IG confirmation attached 6/20/2023)
Debarment/Suspension Verified	Date: 5/25/23	DT	OK
Auditor’s Finding	Date: 5/26/23	DT	OK
Vendor’s Submission		DT	OK
Independent Contractor (I.C.) Requirement	Date: 3/3/23	DT	OK
Cover - <i>Master contracts only</i>		DT	OK
Contract Evaluation – <i>if required</i>		N/A	N/A
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.		N/A	N/A
Checklist Verification		DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
	Department initials

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		N/A			
Infor/Lawson PO# and PO Code (if applicable)					
Lawson RQ# (if applicable)					
CM Contract#					
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$				
	Prior Amendment Amounts (list separately)	\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$				

PURCHASING USE ONLY

Prior Resolutions	
CM#:	3452
Vendor Name:	Furukawa, Amy

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/20/2023: Reviewed – will be approved once all 37 actions for this master contract are approved 6/15/2023: 11 of 37; e-mail to DTatum – need IG confirmation
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3453

(12 of 37) [David Harmon & Assoc](#)

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION

Formal RFQ

Reviewed by Purchasing

	Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)	DT	OK
Bid Specification Packet	DT	OK
Final DEI Goal Setting Worksheet	DT	OK
Diversity Documents – <i>if required (goal set)</i>	N/A	N/A
Award Letter (sent to awarded vendor)	DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>	N/A	N/A
Tabulation Sheet	DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators.</i>)	DT	OK
IG# 23-0083-REG	DT	OK
Debarment/Suspension Verified Date: 5/25/23	DT	OK
Auditor’s Finding Date: 5/26/23	DT	OK
Vendor’s Submission	DT	OK
Independent Contractor (I.C.) Requirement Date: 4/7/23	DT	OK
Cover - <i>Master contracts only</i>	DT	OK
Contract Evaluation – <i>if required</i>	N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.	N/A	N/A
Checklist Verification	DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700202			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$1,904.50	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$50,181.50				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

CM#:	3453
Vendor Name:	David Harmon & Assoc (Harmon, David)
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/14/2023: 12 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3454

(13 of 37) Harmon, David Jr

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION			
Formal RFQ			
Reviewed by Purchasing			
		Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)		DT	OK
Bid Specification Packet		DT	OK
Final DEI Goal Setting Worksheet		DT	OK
Diversity Documents – <i>if required (goal set)</i>		N/A	N/A
Award Letter (sent to awarded vendor)		DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>		N/A	N/A
Tabulation Sheet		DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators.</i>)		DT	OK
IG#	23-0168-REG	DT	OK
Debarment/Suspension Verified	Date: 5/25/23	DT	OK
Auditor’s Finding	Date: 5/26/23	DT	OK
Vendor’s Submission		DT	OK
Independent Contractor (I.C.) Requirement	Date: 6/1/23	DT	OK
Cover - <i>Master contracts only</i>		DT	OK
Contract Evaluation – <i>if required</i>		N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.		N/A	N/A
Checklist Verification		DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700203			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$2,094.00	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$50,371.00				

PURCHASING USE ONLY

Prior Resolutions	Bc2018-873, R2017-0177
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

CM#:	3454
Vendor Name:	Harmon, David Jr
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/14/2023: 13 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3455

(14 of 37) Harmon, David Jr

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION			
Formal RFQ			
Reviewed by Purchasing			
		Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)		DT	OK
Bid Specification Packet		DT	OK
Final DEI Goal Setting Worksheet		DT	OK
Diversity Documents – <i>if required (goal set)</i>		N/A	N/A
Award Letter (sent to awarded vendor)		DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>		N/A	N/A
Tabulation Sheet		DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).		DT	OK
IG#	21-0065-REG	DT	OK
Debarment/Suspension Verified	Date: 5/25/23	DT	OK
Auditor’s Finding	Date: 5/26/23	DT	OK
Vendor’s Submission		DT	OK
Independent Contractor (I.C.) Requirement	Date: 3/6/23 / 3/13/2023	DT	OK
Cover - <i>Master contracts only</i>		DT	OK
Contract Evaluation – <i>if required</i>		N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.		N/A	N/A
Checklist Verification		DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
	Department initials

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700204			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$5,960.65	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$54,237.65				

PURCHASING USE ONLY

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Prior Resolutions	BC2018-873, R2017-0177
CM#:	3455
Vendor Name:	Hogan, Thomas P
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/15/2023: 14 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3528

(37 of 37) Horton, Edward

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION

Formal RFQ

Reviewed by Purchasing

			Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)			DT	OK
Bid Specification Packet			DT	OK
Final DEI Goal Setting Worksheet			DT	OK
Diversity Documents – <i>if required (goal set)</i>			N/A	N/A
Award Letter (sent to awarded vendor)			DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>			N/A	N/A
Tabulation Sheet			DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).			DT	OK
IG#	21-0066-REG		DT	OK
Debarment/Suspension Verified	Date:	5/25/23 6/4/2023	DT	OK
Auditor’s Finding	Date:	5/25/23 6/4/2023	DT	OK
Vendor’s Submission			DT	OK
Independent Contractor (I.C.) Requirement	Date:	3/23/23 3/29/2023	DT	OK
Cover - <i>Master contracts only</i>			DT	OK
Contract Evaluation – <i>if required</i>			N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.			N/A	N/A
Checklist Verification			DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

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Revised 7/28/2022

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

	Department initials
Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$37,500.00
			TOTAL		\$86,901.46

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700200			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$61,625.00		10/1/17-12/31/18 7/17/2017- 5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$			
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$61,625.00				

PURCHASING USE ONLY

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Revised 7/28/2022

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Prior Resolutions	R2017-0177
CM#:	3528
Vendor Name:	Horton, Edward
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$86,901.46mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/23/2023: 37 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3456

(15 of 37) Jackson, Donna

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION			
Formal RFQ			
Reviewed by Purchasing			
		Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)		DT	OK
Bid Specification Packet		DT	OK
Final DEI Goal Setting Worksheet		DT	OK
Diversity Documents – <i>if required (goal set)</i>		N/A	N/A
Award Letter (sent to awarded vendor)		DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>		N/A	N/A
Tabulation Sheet		DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).		DT	OK
IG#	23-0072-REG	DT	OK
Debarment/Suspension Verified	Date: 5/25/23	DT	OK
Auditor’s Finding	Date: 5/26/23	DT	OK
Vendor’s Submission		DT	OK
Independent Contractor (I.C.) Requirement	Date: 3/22/23 6/19/2023	DT	OK (new form uploaded 6/21/2023)
Cover - <i>Master contracts only</i>		DT	OK
Contract Evaluation – <i>if required</i>		N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.		N/A	N/A
Checklist Verification		DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
	Department initials

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Revised 7/28/2022

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700205			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$7,040.65	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$55,317.65				

PURCHASING USE ONLY

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Prior Resolutions	BC2018-873, R2017-0177
CM#:	3456
Vendor Name:	Jackson, Donna
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/22/2023: Reviewed – will be approved once all 37 actions for this master contract are approved 6/14/2023: 15 of 37; must complete revised ICF due to past County employee -- form e-mailed to DTatum today.
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3457

(16 of 37) Jackson, Timothy

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION Formal RFQ Reviewed by Purchasing

	Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)	DT	OK
Bid Specification Packet	DT	OK
Final DEI Goal Setting Worksheet	DT	OK
Diversity Documents – <i>if required (goal set)</i>	N/A	N/A
Award Letter (sent to awarded vendor)	DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>	N/A	N/A
Tabulation Sheet	DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).	DT	OK
IG# 23-0059-REG	DT	OK
Debarment/Suspension Verified	Date: 5/25/23	DT OK
Auditor’s Finding	Date: 5/26/23	DT OK
Vendor’s Submission	DT	OK
Independent Contractor (I.C.) Requirement	Date: 2/24/23 6/19/2023	DT OK (uploaded 6/20/2023)
Cover - <i>Master contracts only</i>	DT	OK
Contract Evaluation – <i>if required</i>	N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.	N/A	N/A
Checklist Verification	DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

	Department initials
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$37,500.00
			TOTAL		\$86,901.46

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700186			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$61,625.00		10/1/17-12/31/18 7/17/2017- 5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$61,625.00				

PURCHASING USE ONLY

Prior Resolutions	R2017-0177
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

CM#:	3457
Vendor Name:	Jackson, Tim
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$86,901.46mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/20/2023: Reviewed – will be approved once all 37 actions for this master contract are approved 6/14/2023: 16 of 37; vendor needs to complete Independent Contractor Form, and to use the current County-provided form (either as available on the Intranet or the form e-mailed to DTatum today)
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3458

(17 of 37) Junior Holdings LLC

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION Formal RFQ Reviewed by Purchasing
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	Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)	DT	OK
Bid Specification Packet	DT	OK
Final DEI Goal Setting Worksheet	DT	OK
Diversity Documents – <i>if required (goal set)</i>	N/A	N/A
Award Letter (sent to awarded vendor)	DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>	N/A	N/A
Tabulation Sheet	DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).	DT	OK
IG# 23-0085-REG	DT	OK
Debarment/Suspension Verified	Date: 5/25/23	DT OK
Auditor’s Finding	Date: 5/26/23 6/16/2023	DT OK (completed 6/16/2023)
Vendor’s Submission	DT	OK
Independent Contractor (I.C.) Requirement	Date: 2/24/23	DT OK
Cover - <i>Master contracts only</i>	DT	OK
Contract Evaluation – <i>if required</i>	N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), <i>if required</i> .	N/A	N/A
Checklist Verification	DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law
Department initials

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700221			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/1/2017- 5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$1,379.20	12/31/17 10/1/2017- 12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$49,656.20				

PURCHASING USE ONLY

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Prior Resolutions	BC2018-873, R2017-0177
CM#:	3458
Vendor Name:	Junior Holdings, LLC (Salvatore, Lawrence)
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/20/2023: Reviewed – will be approved once all 37 actions for this master contract are approved 6/14/2023: 17 of 37; attach findings for recovery for Salvatore, Lawrence to complete requirement
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3459

(18 of 37) Kapusi, Christina

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION				
Formal RFQ				
Reviewed by Purchasing				
			Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)			DT	OK
Bid Specification Packet			DT	OK
Final DEI Goal Setting Worksheet			DT	OK
Diversity Documents – <i>if required (goal set)</i>			N/A	N/A
Award Letter (sent to awarded vendor)			DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>			N/A	N/A
Tabulation Sheet			DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).			DT	OK
IG#	23-0075-REG		DT	OK
Debarment/Suspension Verified	Date:	5/25/23	DT	OK
Auditor’s Finding	Date:	5/26/23	DT	OK
Vendor’s Submission			DT	OK
Independent Contractor (I.C.) Requirement	Date:	3/7/23	DT	OK
Cover - <i>Master contracts only</i>			DT	OK
Contract Evaluation – <i>if required</i>			N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.			N/A	N/A
Checklist Verification			DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700206			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$8,808.25	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$57,085.25				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

CM#:	3459
Vendor Name:	Kapusi, Christina
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/14/2023: 18 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3460

(19 of 37) Kinzel, Paul

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION

Formal RFQ

Reviewed by Purchasing

		Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)		DT	OK
Bid Specification Packet		DT	OK
Final DEI Goal Setting Worksheet		DT	OK
Diversity Documents – <i>if required (goal set)</i>		N/A	N/A
Award Letter (sent to awarded vendor)		DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>		N/A	N/A
Tabulation Sheet		DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).		DT	OK
IG#	21-0064-REG	DT	OK
Debarment/Suspension Verified	Date: 5/25/23	DT	OK
Auditor’s Finding	Date: 5/26/23	DT	OK
Vendor’s Submission		DT	OK
Independent Contractor (I.C.) Requirement	Date: 3/1/23	DT	OK
Cover - <i>Master contracts only</i>		DT	OK
Contract Evaluation – <i>if required</i>		N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.		N/A	N/A
Checklist Verification		DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700207			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$9,218.65	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$57,495.65				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

CM#:	3460
Vendor Name:	Kinczel, Paul
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/14/2023: 19 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3461

(20 of 37) Koz, John

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION			
Formal RFQ			
Reviewed by Purchasing			
		Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)		DT	OK
Bid Specification Packet		DT	OK
Final DEI Goal Setting Worksheet		DT	OK
Diversity Documents – <i>if required (goal set)</i>		N/A	N/A
Award Letter (sent to awarded vendor)		DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>		N/A	N/A
Tabulation Sheet		DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).		DT	OK
IG#	21-0334-REG	DT	OK
Debarment/Suspension Verified	Date: 5/25/23	DT	OK
Auditor’s Finding	Date: 5/26/23	DT	OK
Vendor’s Submission		DT	OK
Independent Contractor (I.C.) Requirement	Date: 2/23/23 2/28/2023	DT	OK
Cover - <i>Master contracts only</i>		DT	OK
Contract Evaluation – <i>if required</i>		N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), <i>if required</i> .		N/A	N/A
Checklist Verification		DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
	Department initials

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700208			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$8,291.65	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$56,568.65				

PURCHASING USE ONLY

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Prior Resolutions	BC2018-873, R2017-0177
CM#:	3461
Vendor Name:	Koz, John
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/15/2023: Reviewed – will be approved once all 37 actions for this master contract are approved 6/14/2023: 20 of 37; need PO code entered;
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3462

(21 of 37) Lassiter, Ruth

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION

Formal RFQ

Reviewed by Purchasing

	Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)	DT	OK
Bid Specification Packet	DT	OK
Final DEI Goal Setting Worksheet	DT	OK
Diversity Documents – <i>if required (goal set)</i>	N/A	N/A
Award Letter (sent to awarded vendor)	DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>	N/A	N/A
Tabulation Sheet	DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators.</i>)	DT	OK
IG# 21-0063-REG	DT	OK
Debarment/Suspension Verified Date: 5/25/23	DT	OK
Auditor’s Finding Date: 5/26/23	DT	OK
Vendor’s Submission	DT	OK
Independent Contractor (I.C.) Requirement Date: 3/29/23	DT	OK
Cover - <i>Master contracts only</i>	DT	OK
Contract Evaluation – <i>if required</i>	N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.	N/A	N/A
Checklist Verification	DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700209			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$5,917.90	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$54,194.90				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

CM#:	3462
Vendor Name:	Lassiter, Ruth
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/15/2023: 21 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3463

(22 of 37) Latitude Appraisals

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION				
Formal RFQ				
Reviewed by Purchasing				
			Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)			DT	OK
Bid Specification Packet			DT	OK
Final DEI Goal Setting Worksheet			DT	OK
Diversity Documents – <i>if required (goal set)</i>			N/A	N/A
Award Letter (sent to awarded vendor)			DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>			N/A	N/A
Tabulation Sheet			DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).			DT	OK
IG#	23-0087-REG FAITH ALTIERI		DT	OK (IG confirmation attached 6/20/2023)
Debarment/Suspension Verified	Date:	5/25/23	DT	OK
Auditor’s Finding	Date:	5/26/23	DT	OK
Vendor’s Submission			DT	OK
Independent Contractor (I.C.) Requirement	Date:	3/8/23	DT	OK
Cover - <i>Master contracts only</i>			DT	OK
Contract Evaluation – <i>if required</i>			N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.			N/A	N/A
Checklist Verification			DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
	Department initials

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Revised 7/28/2022

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700191			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$4,581.50	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$52,858.50				

PURCHASING USE ONLY

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Prior Resolutions	BC2018-873, R2017-0177
CM#:	3463
Vendor Name:	Latitude Appraisals (Labatte, Faith)
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/20/2023: Reviewed – will be approved once all 37 actions for this master contract are approved 6/15/2023: 22 of 37; need IG confirmation -email to DTatum
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3464

(23 of 37) Lenehan, John

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION Formal RFQ Reviewed by Purchasing

	Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)	DT	OK
Bid Specification Packet	DT	OK
Final DEI Goal Setting Worksheet	DT	OK
Diversity Documents – <i>if required (goal set)</i>	N/A	N/A
Award Letter (sent to awarded vendor)	DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>	N/A	N/A
Tabulation Sheet	DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).	DT	OK
IG# 20-0367-REG	DT	OK
Debarment/Suspension Verified Date: 5/25/23	DT	OK
Auditor’s Finding Date: 5/26/23	DT	OK
Vendor’s Submission	DT	OK
Independent Contractor (I.C.) Requirement Date: 3/13/23	DT	OK
Cover - <i>Master contracts only</i>	DT	OK
Contract Evaluation – <i>if required</i>	N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.	N/A	N/A
Checklist Verification	DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700210			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$2,175.50	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$50,425.50				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

CM#:	3464
Vendor Name:	Lenehan, John
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/15/2023: 23 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3465

(24 of 37) Levering, Wayne F.

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION Formal RFQ Reviewed by Purchasing

	Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)	DT	OK
Bid Specification Packet	DT	OK
Final DEI Goal Setting Worksheet	DT	OK
Diversity Documents – <i>if required (goal set)</i>	N/A	N/A
Award Letter (sent to awarded vendor)	DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>	N/A	N/A
Tabulation Sheet	DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).	DT	OK
IG# 23-0096-REG	DT	OK
Debarment/Suspension Verified Date: 5/25/23	DT	OK
Auditor’s Finding Date: 5/26/23	DT	OK
Vendor’s Submission	DT	OK
Independent Contractor (I.C.) Requirement Date: 3/23/23 / 3/30/2023	DT	OK
Cover - <i>Master contracts only</i>	DT	OK
Contract Evaluation – <i>if required</i>	N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.	N/A	N/A
Checklist Verification	DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

	Department initials
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$37,500.00
			TOTAL		\$89,901.46

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700187			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$61,625.00		10/1/17-12/31/18 7/17/2017- 5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$				

PURCHASING USE ONLY

Prior Resolutions	R2017-0177
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

CM#:	3465
Vendor Name:	Levering, Wayne
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$89,901.46mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/15/2023: 24 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3466

(25 of 37) Loftus, Christopher

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION

Formal RFQ

Reviewed by Purchasing

	Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)	DT	OK
Bid Specification Packet	DT	OK
Final DEI Goal Setting Worksheet	DT	OK
Diversity Documents – <i>if required (goal set)</i>	N/A	N/A
Award Letter (sent to awarded vendor)	DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>	N/A	N/A
Tabulation Sheet	DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).	DT	OK
IG# 20-0366-REG	DT	OK
Debarment/Suspension Verified Date: 5/25/23	DT	OK
Auditor’s Finding Date: 5/26/23	DT	OK
Vendor’s Submission	DT	OK
Independent Contractor (I.C.) Requirement Date: 2/27/23	DT	OK
Cover - <i>Master contracts only</i>	DT	OK
Contract Evaluation – <i>if required</i>	N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.	N/A	N/A
Checklist Verification	DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$52,023.72 \$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$69,317.17 \$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700211			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017- 5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$5,756.80	12/31/17 10/1/2017- 12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$54,033.80				

PURCHASING USE ONLY

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Prior Resolutions	BC2018-873, R2017-0177
CM#:	3466
Vendor Name:	Loftus, Christopher J
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/14/2023: 25 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3467

(26 of 37) Mamer, Bruce J.

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION			
Formal RFQ			
Reviewed by Purchasing			
		Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)		DT	OK
Bid Specification Packet		DT	OK
Final DEI Goal Setting Worksheet		DT	OK
Diversity Documents – <i>if required (goal set)</i>		N/A	N/A
Award Letter (sent to awarded vendor)		DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>		N/A	N/A
Tabulation Sheet		DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators.</i>)		DT	OK
IG#	23-0081-REG	DT	OK
Debarment/Suspension Verified	Date: 5/25/23	DT	OK
Auditor’s Finding	Date: 5/26/23	DT	OK
Vendor’s Submission		DT	OK
Independent Contractor (I.C.) Requirement	Date: 3/12/23	DT	OK (revised attached 6/20/2023)
Cover - <i>Master contracts only</i>		DT	OK
Contract Evaluation – <i>if required</i>		N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.		N/A	N/A
Checklist Verification		DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)	CE1700212				
Infor/Lawson PO# and PO Code (if applicable)	N/A				
Lawson RQ# (if applicable)	N/A				
CM Contract#	N/A				
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$706.50	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$48,983.50				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

CM#:	3467
Vendor Name:	Mamer, Bruce J
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/20/2023: Reviewed – will be approved once all 37 actions for this master contract are approved 6/15/2023: 26 of 37; Attach vendor submission to RFQ, vendor must check designation on Independent Contractor Form
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Contract	Participants	Lines *	Rebates	Related Documents	Comments (1)	Comments (22)	Retainage	Milestones	Deliverables	Email Notifications	Purchase From	
<input type="checkbox"/>	Manual	ADDENDUM				5. RQ11388-Addendum1 Event Notice.pdf				No	No	Yes 6/4/2023 10:07:3
<input type="checkbox"/>	Manual	INTENT				1. intent to award.pdf				No	No	Yes 6/4/2023 10:07:4
<input type="checkbox"/>	Manual	BID PACK				2. RFO Individual Contractor Assessment 2024.pdf				No	No	Yes 6/4/2023 10:07:5
<input type="checkbox"/>	Manual	DEI				3. ERP - Misc (BOLRO # 11388) DELGOAL SETTING WORKSHEET.pdf				No	No	Yes 6/4/2023 10:08:0
<input type="checkbox"/>	Manual	AWARD LETTER				mamer.pdf				No	No	Yes 6/4/2023 10:08:5
<input type="checkbox"/>	Manual	EVAL				5. evaluation answers ven 11388 event 1351.xlsx				No	No	Yes 6/4/2023 10:09:0
<input type="checkbox"/>	Manual	DEBAR				DEBAR1111 mamer.pdf				No	No	Yes 6/4/2023 10:09:1
<input type="checkbox"/>	Manual	ADS				ads mamer.pdf				No	No	Yes 6/4/2023 10:09:2
<input checked="" type="checkbox"/>	Manual	VENDOR SUB				vet mamer.pdf				Yes	Yes	Yes 6/4/2023 10:09:3
<input type="checkbox"/>	Manual	MASTER COVER				6. master contract cover.doc				No	No	Yes 6/4/2023 10:09:4
<input type="checkbox"/>	Manual	ICF				icf.pdf				No	No	Yes 6/4/2023 10:10:0
<input type="checkbox"/>	Manual	FUNDS BREAKDOWN				8. master contract cover breakdown revised.xlsx				No	No	Yes 6/5/2023 10:51:0
<input type="checkbox"/>	Manual	BRIEFING MEMO				briefing memo approval-2024 Seasonal recapital.doc				No	No	Yes 6/8/2023 9:37:14
<input type="checkbox"/>	Manual	TAB SHEET				4. TAB SHEET.pdf				No	No	Yes 6/13/2023 2:39:1
<input type="checkbox"/>	Manual	contract				combine contract.pdf				No	No	Yes 6/14/2023 8:57:3
<input type="checkbox"/>	Manual	CHECKLIST				checklist mamer.docx				No	No	Yes 6/9/2023 10:03:1
<input type="checkbox"/>	Manual	COI				coi mamer revised.pdf				No	No	Yes 6/12/2023 1:52:1
<input type="checkbox"/>	Manual	insurance approval				awate insurance email.pdf				No	No	Yes 6/13/2023 11:36
<input type="checkbox"/>	Manual	insurance list				Fiscal Approval Compliance-6-12-2023.pdf				No	No	Yes 6/13/2023 11:36

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3468

(27 of 37) McLaughlin, Paul

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION			
Formal RFQ			
Reviewed by Purchasing			
		Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)		DT	OK
Bid Specification Packet		DT	OK
Final DEI Goal Setting Worksheet		DT	OK
Diversity Documents – <i>if required (goal set)</i>		N/A	N/A
Award Letter (sent to awarded vendor)		DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>		N/A	N/A
Tabulation Sheet		DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).		DT	OK
IG#	23-0111-REG	DT	OK
Debarment/Suspension Verified	Date: 5/25/23	DT	OK
Auditor’s Finding	Date: 5/26/23	DT	OK
Vendor’s Submission		DT	OK
Independent Contractor (I.C.) Requirement	Date: 3/22/23	DT	OK
Cover - <i>Master contracts only</i>		DT	OK
Contract Evaluation – <i>if required</i>		N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.		N/A	N/A
Checklist Verification		DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700213			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$7,719.25	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$55,996.25				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

CM#:	3468
Vendor Name:	McLaughlin, Paul
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/15/2023: 27 of 37; Need PO code entered; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3469

(28 of 37) Neal, Maria

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION			
Formal RFQ			
Reviewed by Purchasing			
		Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)		DT	OK
Bid Specification Packet		DT	OK
Final DEI Goal Setting Worksheet		DT	OK
Diversity Documents – <i>if required (goal set)</i>		N/A	N/A
Award Letter (sent to awarded vendor)		DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>		N/A	N/A
Tabulation Sheet		DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).		DT	OK
IG#	23-0068-REG	DT	OK
Debarment/Suspension Verified	Date: 5/25/23	DT	OK
Auditor’s Finding	Date: 5/26/23	DT	OK
Vendor’s Submission		DT	OK
Independent Contractor (I.C.) Requirement	Date: 3/7/23	DT	OK
Cover - <i>Master contracts only</i>		DT	OK
Contract Evaluation – <i>if required</i>		N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.		N/A	N/A
Checklist Verification		DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700214			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$5,490.85	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$53,767.85				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

CM#:	3469
Vendor Name:	Neal, Maria
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/15/2023: 28 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3470

(29 of 37) Patriski, Stan

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION Formal RFQ Reviewed by Purchasing
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	Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)	DT	OK
Bid Specification Packet	DT	OK
Final DEI Goal Setting Worksheet	DT	OK
Diversity Documents – <i>if required (goal set)</i>	N/A	N/A
Award Letter (sent to awarded vendor)	DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>	N/A	N/A
Tabulation Sheet	DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).	DT	OK
IG# 20-0184-REG	DT	OK (IG confirmation attached 6/20/2023)
Debarment/Suspension Verified	Date: 5/25/23	DT OK
Auditor’s Finding	Date: 5/26/23	DT OK
Vendor’s Submission		DT OK
Independent Contractor (I.C.) Requirement	Date: 3/22/23	DT OK
Cover - <i>Master contracts only</i>		DT OK
Contract Evaluation – <i>if required</i>		N/A OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.		N/A
Checklist Verification	DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law
Department initials

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700216			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$2,482.00	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$50,759.00				

PURCHASING USE ONLY

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Prior Resolutions	BC2018-873, R2017-0177
CM#:	3470
Vendor Name:	Patriski, Stan
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/20/2023: Reviewed – will be approved once all 37 actions for this master contract are approved 6/15/2023: 29 of 37; e-mail to DTatum – need IG confirmation
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3471

(30 of 37) Patriski-Roff, Andrea

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION			
Formal RFQ			
Reviewed by Purchasing			
		Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)		DT	OK
Bid Specification Packet		DT	OK
Final DEI Goal Setting Worksheet		DT	OK
Diversity Documents – <i>if required (goal set)</i>		N/A	N/A
Award Letter (sent to awarded vendor)		DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>		N/A	N/A
Tabulation Sheet		DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).		DT	OK
IG#	23-0172 -REG	DT	OK
Debarment/Suspension Verified	Date: 5/25/23	DT	OK
Auditor’s Finding	Date: 5/26/23	DT	OK
Vendor’s Submission		DT	OK
Independent Contractor (I.C.) Requirement	Date: 6.2.23	DT	OK
Cover - <i>Master contracts only</i>		DT	OK
Contract Evaluation – <i>if required</i>		N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.		N/A	N/A
Checklist Verification		DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700220			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$	10/1/2017-12/31/2018	12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$48,277.00				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
CM#:	3471

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Vendor Name:	Patriski-Roff, Andrea
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/23/2023: 30 of 34; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3472

(31 of 37) Pattie, Debra

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION

Formal RFQ

Reviewed by Purchasing

	Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)	DT	OK
Bid Specification Packet	DT	OK
Final DEI Goal Setting Worksheet	DT	OK
Diversity Documents – <i>if required (goal set)</i>	N/A	N/A
Award Letter (sent to awarded vendor)	DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>	N/A	N/A
Tabulation Sheet	DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).	DT	OK
IG# 23-0060-REG	DT	OK
Debarment/Suspension Verified Date: 5/25/23	DT	OK
Auditor’s Finding Date: 5/26/23	DT	OK
Vendor’s Submission	DT	OK
Independent Contractor (I.C.) Requirement Date: 2/26/23	DT	OK
Cover - <i>Master contracts only</i>	DT	OK
Contract Evaluation – <i>if required</i>	N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.	N/A	N/A
Checklist Verification	DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700217			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$7,003.30	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$55,280.30				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

CM#:	3472
Vendor Name:	Pattie, Debra
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/15/2023: 31 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3473

(32 of 37) Rocco, Daniel

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION

Formal RFQ

Reviewed by Purchasing

	Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)	DT	OK
Bid Specification Packet	DT	OK
Final DEI Goal Setting Worksheet	DT	OK
Diversity Documents – <i>if required (goal set)</i>	N/A	N/A
Award Letter (sent to awarded vendor)	DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>	N/A	N/A
Tabulation Sheet	DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).	DT	OK
IG# 23-0071-REG	DT	OK
Debarment/Suspension Verified Date: 5/25/23	DT	OK
Auditor’s Finding Date: 5/26/23	DT	OK
Vendor’s Submission	DT	OK
Independent Contractor (I.C.) Requirement Date: 3/3/23	DT	OK
Cover - <i>Master contracts only</i>	DT	OK
Contract Evaluation – <i>if required</i>	N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.	N/A	N/A
Checklist Verification	DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700219			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$5,440.00	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$53,717.00				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

CM#:	3473
Vendor Name:	Rocco, Daniel
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/15/2023: 32 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer's initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3474

(33 of 37) Sarkisian, Kristin

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION			
Formal RFQ			
Reviewed by Purchasing			
		Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)		DT	OK
Bid Specification Packet		DT	OK
Final DEI Goal Setting Worksheet		DT	OK
Diversity Documents – <i>if required (goal set)</i>		N/A	N/A
Award Letter (sent to awarded vendor)		DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>		N/A	N/A
Tabulation Sheet		DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).		DT	OK
IG#	23-0092-REG	DT	OK
Debarment/Suspension Verified	Date: 5/25/23	DT	OK
Auditor’s Finding	Date: 5/26/23	DT	OK
Vendor’s Submission		DT	OK
Independent Contractor (I.C.) Requirement	Date: 3/15/23	DT	OK
Cover - <i>Master contracts only</i>		DT	OK
Contract Evaluation – <i>if required</i>		N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.		N/A	N/A
Checklist Verification		DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law	
	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700223			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017- 5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$6,999.60	12/31/17 10/1/2017- 12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$55,276.60				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

CM#:	3474
Vendor Name:	Sarkisian, Kristin
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/15/2023: 33 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3475

(34 of 37) TMW Appraisals

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION				
Formal RFQ				
Reviewed by Purchasing				
			Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)			DT	OK
Bid Specification Packet			DT	OK
Final DEI Goal Setting Worksheet			DT	OK
Diversity Documents – <i>if required (goal set)</i>			N/A	N/A
Award Letter (sent to awarded vendor)			DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>			N/A	N/A
Tabulation Sheet			DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).			DT	OK
IG#	21-0400-REG		DT	OK
Debarment/Suspension Verified	Date:	5/25/23	DT	OK
Auditor’s Finding	Date:	5/26/23 6/23/2023	DT	OK (Weinberg completed by Department of Purchasing)
Vendor’s Submission			DT	OK
Independent Contractor (I.C.) Requirement	Date:	3/1/23	DT	OK
Cover - <i>Master contracts only</i>			DT	OK
Contract Evaluation – <i>if required</i>			N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.			N/A	N/A
Checklist Verification			DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

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Revised 7/28/2022

Department of Purchasing – Required Documents Checklist

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	Department initials
Agreement/Contract and Exhibits	DT
Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700225			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017- 5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$	10/1/2017- 12/31/2018	12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$48,277.00				

PURCHASING USE ONLY

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Prior Resolutions	BC2018-873, R2017-0177
CM#:	3475
Vendor Name:	TMW Appraisals (Weinberg, Thomas)
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	6/23/2023: 34 of 37
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3476

(35 of 37) Ward, David

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION

Formal RFQ

Reviewed by Purchasing

	Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)	DT	OK
Bid Specification Packet	DT	OK
Final DEI Goal Setting Worksheet	DT	OK
Diversity Documents – <i>if required (goal set)</i>	N/A	N/A
Award Letter (sent to awarded vendor)	DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>	N/A	N/A
Tabulation Sheet	DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).	DT	OK
IG# 23-0056-REG	DT	OK
Debarment/Suspension Verified Date: 5/25/23	DT	OK
Auditor’s Finding Date: 5/26/23	DT	OK
Vendor’s Submission	DT	OK
Independent Contractor (I.C.) Requirement Date: 2/24/23	DT	OK
Cover - <i>Master contracts only</i>	DT	OK
Contract Evaluation – <i>if required</i>	N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.	N/A	N/A
Checklist Verification	DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date- 12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700224			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017- 5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$5,631.25	12/31/17 10/1/2017- 12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$53,908.25				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
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Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

CM#:	3476
Vendor Name:	Ward, David
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/15/2023: 35 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Infor/Lawson RQ#:	11388
Infor/Lawson PO# Code (if applicable):	RFQ
Event #	3851
CM Contract#	3477

(36 of 37) Williams, Crystal

	Department initials	Clerk of the Board
Briefing Memo	DT	<input type="checkbox"/>

Late Submittal Required:	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Why is the contract being submitted late?		
What is being done to prevent this from reoccurring?		

TAC or CTO Required or authorized IT Standard	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
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FULL AND OPEN COMPETITION

Formal RFQ

Reviewed by Purchasing

	Department initials	Purchasing
Notice of Intent to Award (sent to all responding vendors)	DT	OK
Bid Specification Packet	DT	OK
Final DEI Goal Setting Worksheet	DT	OK
Diversity Documents – <i>if required (goal set)</i>	N/A	N/A
Award Letter (sent to awarded vendor)	DT	OK
Vendor’s Confidential Financial Statement – <i>if RFP requested</i>	N/A	N/A
Tabulation Sheet	DT	OK
Evaluation with Scoring Summary (<i>Names of evaluators to be included, must have minimum of three evaluators</i>).	DT	OK
IG# 20-0122-REG	DT	OK
Debarment/Suspension Verified Date: 5/25/23	DT	OK
Auditor’s Finding Date: 5/26/23	DT	OK
Vendor’s Submission	DT	OK
Independent Contractor (I.C.) Requirement Date: 2/27/23	DT	OK
Cover - <i>Master contracts only</i>	DT	OK
Contract Evaluation – <i>if required</i>	N/A	OK
TAC/CTO Approval or IT Standards (attach and identify relevant page #s), if required.	N/A	N/A
Checklist Verification	DT	OK

Other documentation may be required depending upon your specific item

Glossary of Terms at: <https://intranet.cuyahoga.cc/policies-procedures/procurement-information>

Reviewed by Law

	Department initials
Agreement/Contract and Exhibits	DT

Department of Purchasing – Required Documents Checklist

Upload as “word” document in Infor

Matrix Law Screen shot	DT
COI	DT
Workers’ Compensation Insurance	N/A

CONTRACT SPENDING PLAN

Time Period	Accounting Unit	Account	Activity	Account Category or Subaccount	Amount
Effective date-12/31/2023	FS305100	55130			\$49,401.46
1/1/2024-12/31/2024	FS305100	55130			\$17,293.45
			TOTAL		\$66,694.91

CONTRACT HISTORY (to be completed by department)

CE/AG# (if applicable)		CE1700226			
Infor/Lawson PO# and PO Code (if applicable)		N/A			
Lawson RQ# (if applicable)		N/A			
CM Contract#		N/A			
	Original Amount	Amendment Amount	Original Time Period & End Date/ Amended End Date	Approval Date	Approval #
Original Amount	\$48,277.00		10/1/17-12/31/18 7/17/2017-5/31/2018	10/10/17	R2017-0177
	Prior Amendment Amounts (list separately)	\$2,221.50	12/31/17 10/1/2017-12/31/2018	12/3/17 12/3/2018	BC2018-873
		\$			
	Pending Amendment	\$			
	Total Amendments	\$			
Total Contact Amount	\$50,498.50				

PURCHASING USE ONLY

Prior Resolutions	BC2018-873, R2017-0177
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Department of Purchasing – Required Documents Checklist




Upload as “word” document in Infor

CM#:	3477
Vendor Name:	Williams, Crystal
ftp:	Effective Date – 12/31/2024, effective as of the latest date of signature of the Parties or date contract is approved by the State of Ohio Tax Commissioner, whichever is later
Amount:	\$66,694.91mm
History/CE:	OK
EL:	OK
Procurement Notes:	All 37 actions for master contract have been reviewed/approved. 6/23/2023 6/15/2023: 36 of 37; Reviewed – will be approved once all 37 actions for this master contract are approved
Purchasing Buyer’s initials and date of approval	OK, ssp 6/23/2023




Department of Purchasing Tabulation Sheet



REQUISITION NUMBER: 11388	EVENT: 3851	TYPE: RPO	ESTIMATE: \$2,548,538.00
CONTRACT PERIOD: Jul 1, 2023 – May 31, 2024	RFQ DUE DATE: January 5, 2023	COMMODITY DESCRIPTION: 2024 Sexennial Reappraisal	NUMBER OF RESPONSES (issued/submitted): 56 / 47
REQUESTING DEPARTMENT: Department of Appraisal	COMMODITY DESCRIPTION: 2024 Sexennial Reappraisal	DIVERSITY GOAL/MBE: 0%	DIVERSITY GOAL/WBE: 0%
DIVERSITY GOAL/SBE: 0%	DIVERSITY GOAL/MBE: 0%	DIVERSITY GOAL/WBE: 0%	




Bidder's / Vendors Name and Address	Buyer Administrative Review:	Dept. Tech. Review	Award: (Y/N)
1. Abrams, Robert 13930 Quail Oval North Royalton, Ohio 44133	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
2. Alder Appraisal (Green, Jennifer) 7669 Webster Road Middleburg Heights, Ohio 44130	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> No Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
3. Andrews, John 31360 Marvis Drive Bay Village, Ohio 44140	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No





Bidder's / Vendor's Name and Address	Buyer Administrative Review:	Dept. Tech. Review	Award: (Y/N)
4. Appraisal Keys, Inc. (Kangas, Matthew) 3104 Clinton Avenue Cleveland, Ohio 44113	Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> No Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No
5. Blaze, Lana P.O. Box 31833 Independence, Ohio 44131	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> Yes IG Number: 21-0315 Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No
6. Blaze, Vernon P.O. Box 31833 Independence, Ohio 44131	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> Yes IG Number: 21-0316 Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No
7. Butler, Mark 5900 Parkridge Avenue Cleveland, Ohio 44144	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> Yes IG Number: 21-0336 Planholder: <input checked="" type="checkbox"/> Yes		<input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No





RQ11388

Bidder's / Vendors Name and Address	Buyer Administrative Review:	Dept. Tech. Review	Award: (Y/N)
8. Carey, Richard 14504 Birchwood Avenue Cleveland, Ohio 44111	Department of Purchasing: SSP Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
9. Chervenak, Ronald Jr. P.O. Box 770049 Lakewood, Ohio 44107	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
10. Coffey & Associates, Inc. (Coffey, Daniel M.) 5420 Mayfield Road, #206 Lynchburg, Ohio 44124	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
11. Colabianchi, Anthony 17160 Turkey Meadow Lane Strongsville, Ohio 44136	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No






Bidder's / Vendors Name and Address	Buyer Administrative Review:	Dept. Tech. Review	Award: (Y/N)
12. Conte, Gregory 5720 Cumberland Drive Garfield Heights, Ohio 44125	Department of Purchasing: SSP Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> Yes IG Number: 20-0382 Planholder: <input checked="" type="checkbox"/> No Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
13. Curran, Patrick 721 Sawmill Drive Avon Lake, Ohio 44012	Department of Purchasing: SSP Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
14. Del Appraisal Services, Inc. (Delisio, Brian) 35885 Brushwood Drive Solon, Ohio 44139	Department of Purchasing: SSP Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
15. Evans Appraisal, LLC (Evans, James) 27330 Georgetown Drive Westlake, Ohio 44145	Department of Purchasing: SSP Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

Bidder's / Vendors Name and Address	Buyer Administrative Review:	Dept. Tech. Review	Award: (Y/N)
16. Feasibility Research Group Ohio, LLC (Williams, Gregory) 13940 Cedar Road Suite 196 University Heights, Ohio 44118	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> Yes IG Number: 22-0002 Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
17. Finkler Appraisal Services (Finkler, Cory) 5550 Carriage Lane Medina, Ohio 44256	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> No Department of Purchasing: SSP		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
18. Furlkawa, Amy 4194 Rusticwood Trail Richfield, Ohio 44286	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
19. David Hartman & Associates (Hammon, David) 12807 Larchmere Boulevard #2 Shaker Heights, Ohio 44120	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No





Bidder's / Vendors Name and Address	Buyer Administrative Review:	Dept. Tech. Review	Award: (Y/N)
20. Harmon, David Jr. 13800 Fairhill Road Suite 320 Shaker Heights, Ohio 44120	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
21. Hogan, Thomas P. 6288 Old Virginia Lane Parma Heights, Ohio 44130	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> Yes IG Number: 21-0065 Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
22. Horton, Edward 3674 Rolliston Road Shaker Heights, Ohio 44120	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> Yes IG Number: 21-0066 Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
23. Jackson, Donna M. 11384 S. Forest Drive Concord Township, Ohio 44077	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
24. Jackson, Tim	Compliant: <input checked="" type="checkbox"/> Yes		<input checked="" type="checkbox"/> Yes

Bidder's / Vendors Name and Address	Buyer Administrative Review:	Dept. Tech. Review	Award: (Y/N)
850 Euclid Avenue Suite 952 Cleveland, Ohio 44114	IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> No
25. Junior Holdings, LLC (Salvatore, Lawrence) 250 Heather Court Mayfield Heights, Ohio 44124	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
26. Kapusi, Christina 8536 Timber Trail Brecksville, Ohio 44141	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
27. Kinzel, Paul 872 Stanwell Drive Highland Heights, Ohio 44143	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> Yes IG Number: 21-0064 Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
28. Koz, John 28929 Lincoln Road	Department of Purchasing: SSP Compliant: <input checked="" type="checkbox"/> Yes		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No


RQ11388

Bidder's / Vendors Name and Address	Buyer Administrative Review:	Dept. Tech. Review	Award: (Y/N)
Bay Village, Ohio 44140	IG Registration Complete: <input checked="" type="checkbox"/> Yes IG Number: 21-0334 Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
29. Lassiter, Ruth 12800 Snowville Road Brecksville, Ohio 44141	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> Yes IG Number: 21-0063 Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
30. Latitude Appraisals, LLC (Labate, Faith) P.O. Box 40352 Bay Village, Ohio 44140	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
31. Lenehan, John 16517 St. Anthony Lane Cleveland, Ohio 44111	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> Yes IG Number: 20-0367 Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
32. Levering, Wayne F. 1449 Chagrin River Road P.O. Box 311	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

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Bidder's / Vendors Name and Address	Buyer Administrative Review:	Dept. Tech. Review	Award: (Y/N)
Gates Mills, Ohio 44040	IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		
33. Loftus, Christopher J. 15724 Norway Avenue Cleveland, Ohio 44111	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> Yes IG Number: 20-0366 Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
34. Mamer, Bruce J. P.O. Box 937 Medina, Ohio 44258	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
35. McLaughlin, Paul 5488 Strathaven Drive Highland Heights, Ohio 44143	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
36. Neal, Maria 6151 Center Street #103 Mentor, Ohio 44060	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

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Bidder's / Vendors Name and Address	Buyer Administrative Review:	Dept. Tech. Review	Award: (Y/N)
37. Patricki, Stan 6679 Big Creek Parkway Middleburg Heights, Ohio 44130	Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> Yes* IG Number: 20-0184 Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
38. Patricki-Roff, Andrea 7845 Montgomery Road Middleburg Heights, Ohio 44130	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> Yes* IG Number: 20-0184 Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
39. Pattie, Debra 7076 Elizabeth Court Mentor, Ohio 44060	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
40. Rocco, Daniel 2948 Meadow Lane Westlake, Ohio 44145	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

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Bidder's / Vendors Name and Address	Buyer Administrative Review:	Dept. Tech. Review	Award: (Y/N)
41. Sarkisian, Kristin 10700 Lake Avenue Cleveland, Ohio 44102	Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
42. SC Valuation Group, LLC (Canola, Stacey) 1905 Cypress Avenue Cleveland, Ohio 44109	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No
43. Satak, John 26535 Hilliard Boulevard Westlake, Ohio 44145	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> No Department of Purchasing: SSP		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
44. TMW Appraisals (Weinberg, Thomas) 2333 Brigadoon Court Westlake, Ohio 44145	Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> Yes IG Number: 21-0400 Planholder: <input checked="" type="checkbox"/> Yes		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

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Bidder's / Vendors Name and Address	Buyer Administrative Review:	Dept. Tech. Review	Award: (Y/N)
45. Wagner, Michael 400 Glencoe Lane Highland Heights, Ohio 44143	Department of Purchasing: SSP Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> Yes IG Number: 21-0337 Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
46. Ward, David 18560 Meadow Lane Strongsville, Ohio 44136	Department of Purchasing: SSP Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> No IG Number: Not Registered Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
47. Williams, Crystal 1097 E. 168th Street Cleveland, Ohio 44110	Department of Purchasing: SSP Compliant: <input checked="" type="checkbox"/> Yes IG Registration Complete: <input checked="" type="checkbox"/> Yes IG Number: 20-0122 Planholder: <input checked="" type="checkbox"/> Yes Department of Purchasing: SSP		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

*Registration must be verified by Inspector General's office regarding tax ID used (may be required to register as an individual depending upon contracted name, if awarded).