



PREPARING FOR CONTRACTING CHECKLIST

Last Updated: 7/23/2008

Preparing for Contracting Checklist

- Avenue NYC/Commercial Revitalization Budget:**
 - Complete your Avenue NYC/Commercial Revitalization Budget for all projects for which you are receiving funding.
 - Send an electronic copy of your Avenue NYC/Commercial Revitalization Budget to your contract manager.

- Doing Business Data Form:**
 - Complete and send the Doing Business Data Form to your contract manager.

- Disclosure & Compliance Certification Form:**
 - Sign the Disclosure & Compliance Certification Form and attach a list of any disclosures that may apply to your organization.
 - Send the completed Disclosure & Compliance Certification Form and any attached disclosures to your contract manager.

- Registration & Compliance with the New York State Charities Bureau:**
 - Register with the New York State Charities Bureau.
or
 - Obtain confirmation of exemption letter and send a copy to your contract manager.
or
 - Ensure previous registration is accurate and up-to-date.

- By-Laws & Certificate of Incorporation:**
 - Send a copy of your organization's By-Laws & Certificate of Incorporation to your contract manager.
 - Have your Board of Directors indicate who has authority to sign agreements.
 - Locate your corporate seal and ensure it is in good working order.

- Insurance:**
 - Ensure you have the following forms of insurance:
 - Commercial General Liability
 - Business Automobile
 - Worker's Compensation and Employee Liability
 - Fidelity Bond Insurance
 - Add the New York City Department of Small Business Services Certificate Holder as an additional insured to each of the insurance policies outlined above.
 - Send proof of insurance to your contract manager through an Insurance ACORD Certificate.
And/or
 - Send an Insurance Waiver Request Letter to your contract manager.

- VENDEX:**
 - Complete the VENDEX Vendor Questionnaire.
 - Complete a VENDEX Principal Questionnaires for each of the principals at your organization.
 - Submit your completed VENDEX documents to the Mayor's Office of Contract Services.
 - Complete and send a Submitted VENDEX Memo to your contract manager.
or
 - Complete and send two copies of the Certification of No Change to your contract manager.

- W-9 Tax Form:**
 - Complete and send your New York City Substitute Form W-9 to your contract manager.

- Cost Allocation Plan:**
 - Complete and send an electronic copy of your Cost Allocation Plan to your contract manager