

I. TITLE

Contract Management

II. OBJECTIVES

To establish sound and consistent management practices with respect to University contracts.

III. SCOPE

Contract administration begins during the Request for Proposal (RFP) process as part of the definition of contract terms and conditions, specifications and scope of work (SOW). Contract management begins after the contract is signed. The Contract Manager (CM) should assure that the contractor's and University's performance is in accordance with the specifications, SOW (if one exists) and the terms and conditions of the contractual agreement.

All contracts and other documents which create legally binding obligations on the University including, but not limited to, supply and procurement contracts, are subject to this Policy. This Policy will apply to a contract until contractual obligations have concluded.

Employment contracts and nonbinding memorandums of understanding are excluded from this Policy.

IV. PROCEDURE**1. Appointment of a Contract Manager (CM)**

- A. A Contract Manager shall be appointed for contracts covered by this Policy. The CM will oversee and take responsibility for initiating the procurement and performance by the University of its obligations under the contract.
- B. The CM should be a staff member closely associated with the University project and relevant contract, with appropriate skill and experience to carry out the responsibilities of the contract management.
- C. The CM may delegate or assign to another staff member various functions or a task regarding the contract, but the CM remains the responsible manager according to the Policy.

2. Planning and Documentation

- A. Contract administration planning should occur pre-award
- B. All purchases encompass some post-award administrative efforts with the degree determined by evaluating the purchase complexity, value, delivery or performance schedule, commodity or service type and risk to the University. The development of a plan must specify the performance outputs and describe the methodology proposed to ascertain contract compliance.

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- C. The specific procedures to be applied by the CM to assure that the contractor/vendor and the University are complying with all terms of the contract are unique to each contract. A contract checklist or milestone chart should be developed for each contract that requires multiple or scheduled actions by the contractor during the contract period. This document should be derived for the contract, extracting requirements, delivery dates, and start up and completion dates, plus any other related items. (These could include items like bonds, certificates of insurance, catalogs, warranties, manuals etc.)
3. Administering the Contract
- A. Ensure that the contract is valid as related to the contract term dates and renewal terms where applicable
 - B. Ascertain that the contractor is providing timely goods and services in accordance with contract requirements
 - C. Ensure that the contract file is complete and contains a copy of the signed contract and any modifications, all contract correspondence, inspections, records, memos and conversations with the contractor, receiving reports, invoices, etc.
 - D. Review and approve any and all invoices submitted for payment for any and all services related to the performance of the contract.
 - E. Notify Procurement Services of any failure by a contractor/vendor to comply with terms and conditions, specifications or SOW (if one exists) of the contract. (See Procurement Policies and Procedures Manual at http://www.montclair.edu/procurement/policies/Procurement_Policies.pdf Procedure #25)
 - F. Prior to the end of the contract term, assess whether the contract can be extended or should/must be rebid. (See Procurement Policies and Procedures Manual at http://www.montclair.edu/procurement/policies/Procurement_Policies.pdf Procedure #27)
 - G. If a contract is not to continue, the CM should provide an orderly transition from the contract.
 - H. Following the expiration or termination of a contract, the CM should update University records accordingly.