eCONTRACT PHILLY

INSTRUCTIONS MANUAL:

HOW TO REGISTER, APPLY, AND DISCLOSE FOR NON-BID CONTRACTS WITH THE CITY OF PHILADELPHIA

Revised: December 22, 2011

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OVERVIEW

eContract Philly is a comprehensive website that the provides that allows the public to:

- Search for new non-bid contract opportunities available from departments throughout City government
- Apply for new contract opportunities
- Find out who the department intends to contract with, including the reason for the decision
- See the names of all applicants for each advertised contract opportunity
- Access the applications submitted by individuals and businesses that have applied for or been awarded non-bid contracts
- View renewal certifications for contracts
- See when contracts are amended (if the amendment increases the original contract amount above a certain level)
- Have access to regular, public reports that summarize non-bid contract activity

The City of Philadelphia now advertises most contract opportunities online and requires that all interested persons or business apply for those contract opportunities online. All applicants and contractors are also required to submit online certain information as a part of their applications or contract requirements.

This manual is intended to help vendors learn how to register with eContract Philly, how to apply for a contract opportunity online, and how to submit an application with the required disclosures. The website provides a number of documents with additional information that supplement this manual. Please be sure to read the other information, including the overviews and FAQs, to learn more about the changes to the non-bid contracting process and what you have to do to apply for a contract opportunity.

WEBSITE OVERVIEW

The **New Contract Opportunities** list displays non-competitively bid contract opportunities with the City of Philadelphia. The list will display open contract opportunities for which you can apply; it also lists closed opportunities whose application deadline has passed and contract opportunities that have been cancelled. Clicking on the opportunity number will link to more detailed information about the opportunity and to an application page for vendors who are interested in applying.

The **Login/Register** link allows you to become a registered user of the site and login to your *Vendor Record* so that you can manage your applications and disclosure forms.

The **Notice of Intent to Contract** list displays City of Philadelphia notices of intent to contract for covered non-competitively bid contracts. Each notice contains the names of all applicants for the contract opportunity and the basis for the decision for intending to contract. Clicking on an opportunity number will link to the individual award notice.

The **Amendment Notices** list displays amendments to non-competitively bid contracts that increase the amount to be paid under the contract by more than $25,000 or by more than twenty percent (20%), whichever is greater.

The **Contract Renewal Certifications** list displays renewals or extensions of contracts and leases if the total of the original and the renewal or extension will exceed one year. The inclusion of a contract or lease on the renewal list indicates that its renewal or extension has been certified by the department commissioner or agency head as being "in the best interest of the City."

The **Vendor Applications for Executed Contracts** list displays vendor applications and disclosures for executed non-competitively bid contracts. Clicking on the Opportunity Number will display a listing of all applicants for a particular contract opportunity and clicking on an applicant name will present the relevant application. "N/A" designates contracts that were not required to be advertised through a notice of contract opportunity. Clicking on “N/A” will take you to the disclosure information for the vendor awarded that contract.

The **Reports** link allows you to view the most recent contract reports issued by the City of Philadelphia.

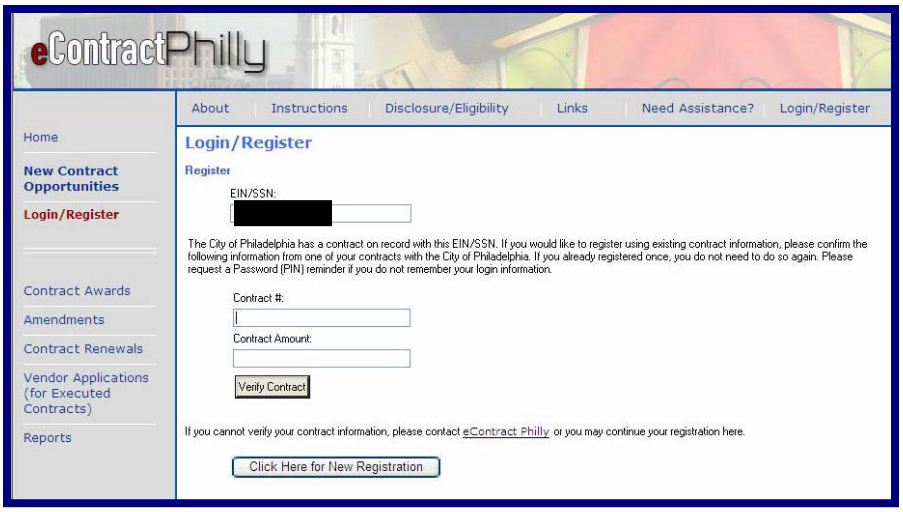
eContract Philly: Horizontal Navigation Bar

The horizontal navigation bar provides in-depth information on using the website, including how to apply for contract opportunities, how to disclose against unadvertised contracts, and what information vendors and applicants are required to disclose.

REGISTRATION

In order to apply for any non-competitively bid contract opportunity with the City of Philadelphia, you must be a registered user with eContract Philly. If you must submit disclosure forms on a Miscellaneous Purchase Order, an unadvertised contract, or a sole source contract, please see pages 7-8 of this manual.

To register, go to www.phila.gov/contracts and choose eContract Philly from the choices listed. Once on the main eContract Philly website, click the Register/Login link on the navigation bar on the left side of the screen to get to the Register/Login screen. When you have arrived at Register/Login screen, click on Register Now!



Please enter your EIN or SSN when prompted. You should use the EIN/SSN of the person or business/organization that is seeking a contract with the City of Philadelphia. If you are registering on behalf of your business/organization, do not use your personal SSN to register. If you have had a contract with the City of Philadelphia before, the system will recognize you as a current vendor and will prompt you to enter the contract number of one of your current contracts and the amount of that contract for verification purposes. If you do not have information on a current contract, please contact econtractphilly@phila.gov or 215-686-4914 for assistance.

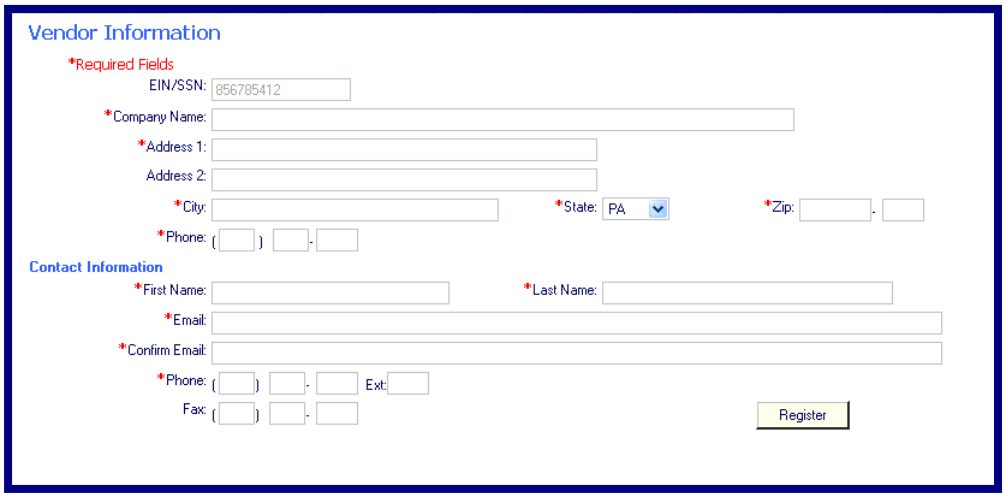
When your EIN/SSN, contract number, and contract amount has been accepted, the system will take you to eContract Philly's Terms of Use. Upon agreeing to these terms, you will be asked to provide contact information including a valid email account to complete your registration.

After you submit the registration, you will receive, by way of the e-mail address you have provided, a confirmation e-mail with your system-generated password. You will need your email address and your password to apply for a contract opportunity on eContract Philly, to update

disclosure forms on a signed contract, or to complete the required disclosure forms for an existing contract. You only need to register once; you may use your email address and password to apply for or disclose against different contracts.

If you do not currently hold a professional services contract (or a Miscellaneous Purchase Order or a sole source contract) with the City of Philadelphia, the system will take you to eContract Philly's Terms of Use after you enter your EIN or SSN. Upon agreeing to these terms, you will be asked to complete your user registration by providing business and contact information including a valid email address. After you submit the registration, you will receive, by way of the e-mail address you have provided, confirmation e-mail with your system-generated password. You will need these to apply for any contract opportunity on eContract Philly. Again, you only need to register once; you may use your email address and password to apply for other contract opportunities or to disclose against different contracts.

Basic Information Required for Registration



If you do not receive an email confirming your registration and your system-generated password within twenty-four (24) hours of registering, please contact econtractphilly@phila.gov or 215-686-4914.

You can register at any time; you do not have to wait until you want to apply for a contract opportunity. However, you will be unable to apply for a contract opportunity before you have registered.

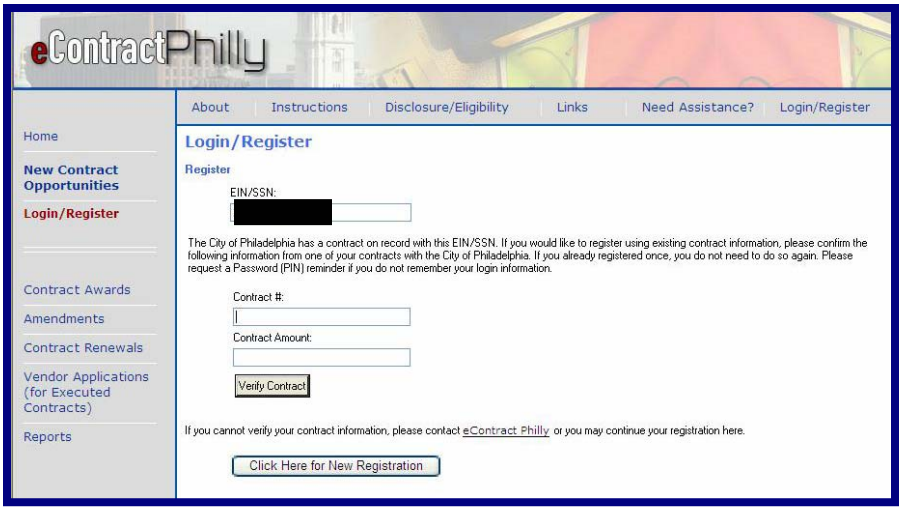
REGISTERING & SUBMITTING DISCLOSURE FORMS FOR UNADVERTISED CONTRACTS, MISCELLANEOUS PURCHASE ORDERS, OR SOLE SOURCE CONTRACTS

Some non-bid contracts may not be advertised with a notice of contract opportunity on the City's official website for a particular reason. For example, non-advertised contracts may be contracts that must be executed without delay for public health or safety reasons or to avoid potential damage to the City's legal interests. Other examples include services contracted under a Miscellaneous Purchase Order (for services under $30,000) or a sole source contract through the Procurement Department.

Another large category of contracts that may not be advertised is contracts between non-profit organizations and certain City departments (the Office of Housing and Community Development, the Department of Human Services, the Department of Public Health, the Department of Recreation, the Office of Supportive Housing, the Department of Behavioral Health and Mental Retardation Services, the Mayor's Office of Community Services, the Philadelphia Prison System, the Mayor's Commission on Disabilities, the Mayor's Commission on Aging, and the Office of the District Attorney). Every exception to the advertisement of a notice of contract opportunity is outlined in Chapter 17-1400 of the Philadelphia Code.

In almost every case, the chosen vendor will still have to submit online disclosure information for that contract **within 14 days of contract execution and before any payments can be made**. The process, however, differs slightly from the process for submitting this information through an application for an advertised contract opportunity.

Instead of submitting disclosure information before the contract process starts, vendors being awarded unadvertised contracts will submit their disclosure information while their contracts are being prepared by the contracting department.

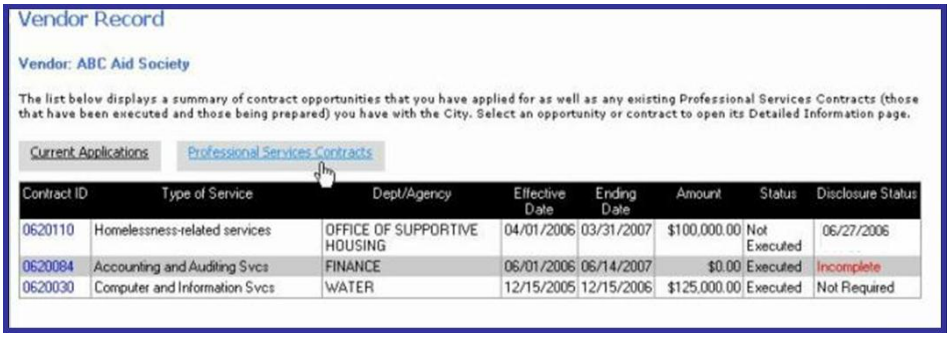


If you are not already registered with eContract Philly, you must do so. Select Register/Login from the left-side navigation bar Once on the Register/Login screen, click on Register Now! Please enter your EIN or SSN when prompted. Use the EIN/SSN of the person or organization that will be contracting with the City of Philadelphia. If you are registering on behalf of your business/organization, do not use your personal SSN to register. The system will recognize you as a vendor with a current professional services contract with the City of Philadelphia and will prompt you to enter the contract number of one of your current contracts and the amount of that contract for verification purposes. If you do not have information on a

current contract or if you receive an error message, please contact econtractphilly@phila.gov or 215-686-4914 for assistance

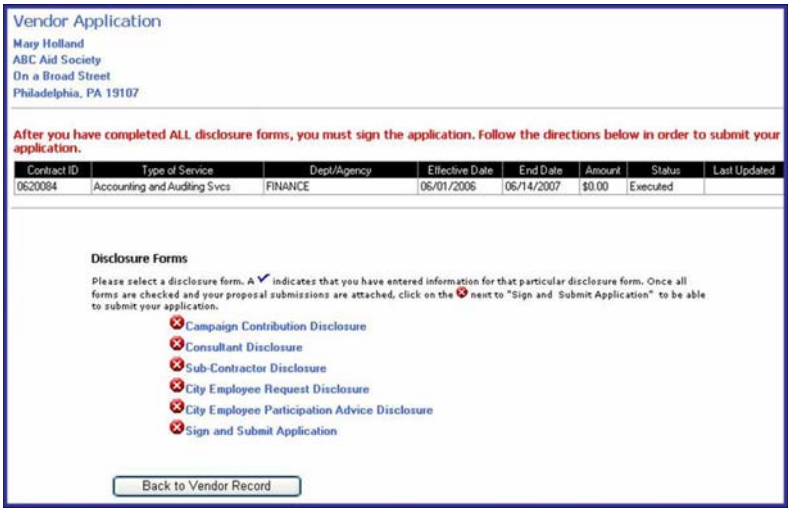
When your EIN (or SSN), contract number and contract amount has been accepted, the system will take you to eContract Philly's Terms of Use. Upon agreeing to these terms, you will be asked to provide contact information including a valid email account to complete your registration.

After you submit the registration, you will receive, by way of the e-mail address you have provided, a confirmation e-mail with your system-generated password. You will need your email address and your password to submit your disclosures for your contract. You may also use your email address and password to apply for a contract opportunity or to update disclosure forms on a signed contract. You only need to register once; you may use your email address and password to apply for or disclose against different contracts.



Contract ID	Type of Service	Dept/Agency	Effective Date	Ending Date	Amount	Status	Disclosure Status
0620110	Homelessness-related services	OFFICE OF SUPPORTIVE HOUSING	04/01/2006	03/31/2007	$100,000.00	Not Executed	06/27/2006
0620084	Accounting and Auditing Svcs	FINANCE	06/01/2006	06/14/2007	$0.00	Executed	Incomplete
0620030	Computer and Information Svcs	WATER	12/15/2005	12/15/2006	$125,000.00	Executed	Not Required

After you have received password, login to your *Vendor Record* under the Register/Login Link. You will automatically be taken to the default page which displays your *Current Applications* list. Next to the *Current Applications* tab, you will see a tab for your list of current *Professional Services Contracts.* The contract for which you have to submit disclosures will appear on this list. An easy way to see whether you have not yet submitted the required disclosure forms for a particular contract is to look at the Disclose Status. If a contract's Disclose Status is listed as Incomplete, you must complete the disclosure forms required for that contract.



Click on your contract and you will be directed to the online disclosure area. At this point, you will be able to complete and submit your disclosure information for this contract. See pages 15-28 in the "Applying for a Contract Opportunity" section for information on completing the disclosure forms.

To determine whether you have completed the necessary disclosure forms for a particular contract, check the Disclosure Status column in your *Vendor Record* to see whether the disclosure forms have been submitted (indicated by date of submission), are Incomplete, or are Not Required.

If you do not see your contract listed on your *Professional Services Contracts* list, please contact eContract Philly immediately (econtractphilly@phila.gov or 215-686-4914) and someone will assist you.

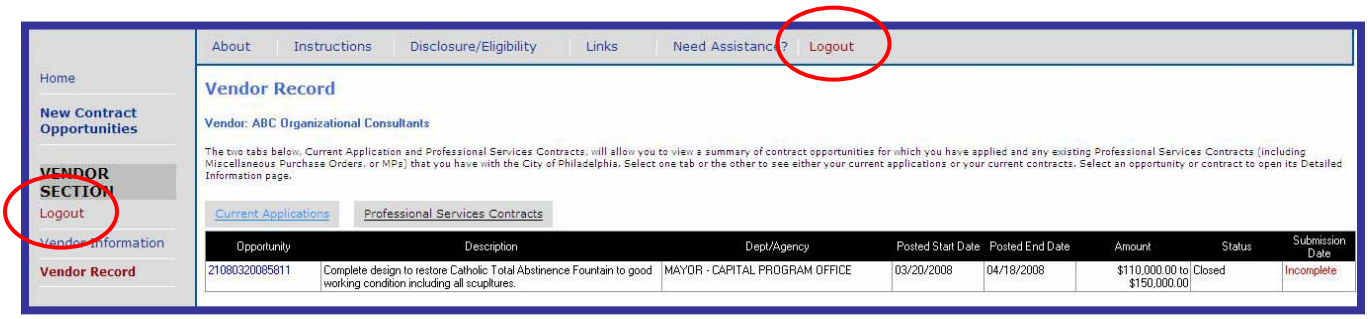
LOGIN AND LOGOUT

Login

To login, go to the eContract Philly website and click Register/Login on the navigation bar on the left side or the top portion of your computer screen. This will take you to the Register/Login screen. If you are a registered user with eContract Philly, simply fill in your email address and your password, click Login, and you will be presented with your *Vendor Record*.

Logout

In order to keep your *Vendor Record* secure, you should always logout by clicking Logout on the navigation bar on the left side or top portion of your computer screen. If you walk away from your computer and you forget to logout, the system will automatically log you out after 20 minutes of inactivity. If you close your Internet browser before logging out, you will be logged out automatically.



CREATING A VENDOR RECORD

Once you have registered as a vendor, each time you login using your secure password, you will be directed to your *Current Applications* list on your *Vendor Record*. Your *Vendor Record* provides two lists: "*Current Applications*" which catalogs the contract opportunities for which you already have applied or are in the process of applying and "*Professional Services Contracts*" which catalogs all of your current non-competitively bid contracts (those executed and those being prepared) with the City of Philadelphia. If a contract for which you have applied is awarded to another applicant, it will be removed from your *Current Applications* list. If the contract is awarded to you, it will be transferred to your *Professional Services Contracts* list.

Vendor Record

Vendor: ABC Aid Society

The list below displays a summary of contract opportunities that you have applied for as well as any existing Professional Services Contracts (those that have been executed and those being prepared) you have with the City. Select an opportunity or contract to open its Detailed Information page.

Current Applications | Professional Services Contracts

Opportunity	Description	Dept/Agency	Posted Start Date	Posted End Date	Amount	Status	Submission Date
2106100614132	Facilities management of city owned Health Care centers	CITY COUNCIL	10/05/2006	12/30/2006	To be determined	Closed	11/12/2006
21060109133316	Aids awareness training and prevention counseling	HEALTH	01/10/2006	09/11/2006	To be determined	Closed	Incomplete
21060117110808	Develop a community-based public awareness program in the North Philadelphia community. It will conduct Community Edcucational programs to change cultural norms and increase public awareness of the health risks of tobacco use are required programs under the State Tobacco Grant.	HEALTH	01/01/2006	09/28/2006	To be determined	Closed	06/27/2006

Clicking on the opportunity number in your *Current Applications* list will take you to your application form for that opportunity. If you have to end your session in the middle of applying for a contract opportunity, the *Vendor Record* will automatically save the information you have entered.

Your *Current Applications* list includes a Submission Date column to help you easily determine whether you have submitted a particular application. If your application has been submitted successfully and has been received by the City of Philadelphia, the field will display the date the application was submitted. If it has not been submitted, the field will display "Incomplete."

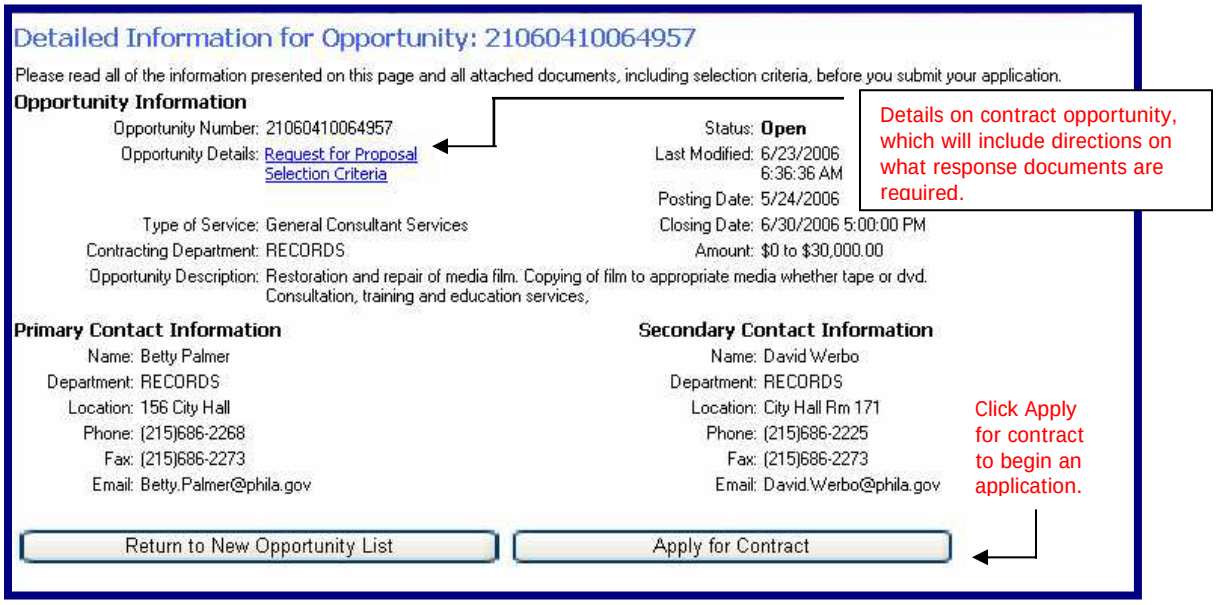
Your *Professional Services Contracts* list displays all contracts that you have with the City of Philadelphia. This can include contracts for which you have applied, unadvertised contracts (see page 7 for details), Miscellaneous Purchase Orders (contracts for services under $30,000), or sole source contracts. If you are unsure of the disclosure status for a particular contract listed on your *Professional Services Contracts* list, check the Disclosure Status column and you will be able to determine whether the disclosures forms have been submitted (indicated by date of submission), are Incomplete, or are Not Required. The *Professional Services Contracts* list also allows you to manage your disclosure forms for your contracts. You can update your disclosures at any time to disclose a reportable event (see page 30 for more on managing your *Vendor Record* and updating your disclosure forms).

LEARNING ABOUT CONTRACT OPPORTUNITIES

You can find out about new non-bid contract opportunities online in the New Contract Opportunities list on the eContract Philly website. All new non-bid contract opportunities will be advertised on this list for at least fifteen (15) days.

Clicking on an opportunity in the list will take you to its Opportunity Details page which provides additional information about that opportunity, such as posting and closing dates, proposed contract amounts, and primary and secondary contact information. Other details, such as proposal requirements and selection criteria, are provided as document links in the Opportunity Details section of the page.

From the Opportunity Details page, you can click "Apply for Contract" to apply. If you have already registered, you can login and you will be directed to an application form for that contract opportunity. If you have not registered but want to apply for the contract opportunity, you must register at this point (see page 5).

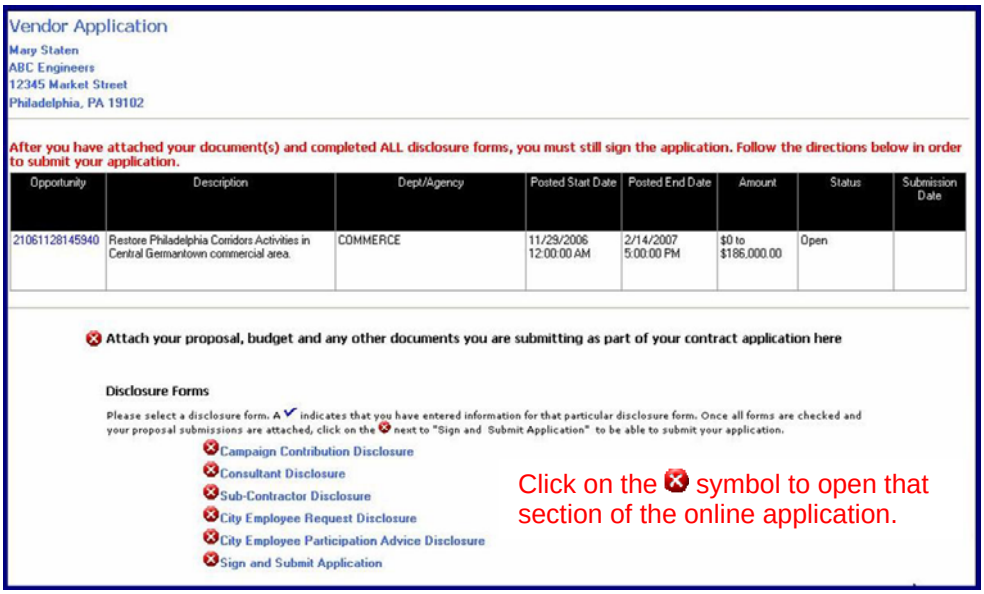


If you would like to return to an application you have already begun, clicking on "Apply for Contract" from the Opportunity Details page and then logging in to your *Vendor Record* will take you directly to your application.

APPLYING FOR A CONTRACT OPPORTUNITY

You will be required to complete and submit an online application for each contract opportunity for which you want to apply. The online application requires the following elements:

- Attach Documents
- Applicant Campaign Contribution Disclosure Form
- Consultant Disclosure Form
- Consultant Contribution Form (when applicable)
- Subcontractor Disclosure Form
- City Employee Request Disclosure Form
- City Employee Participation Advice Disclosure Form
- Sign and Submit

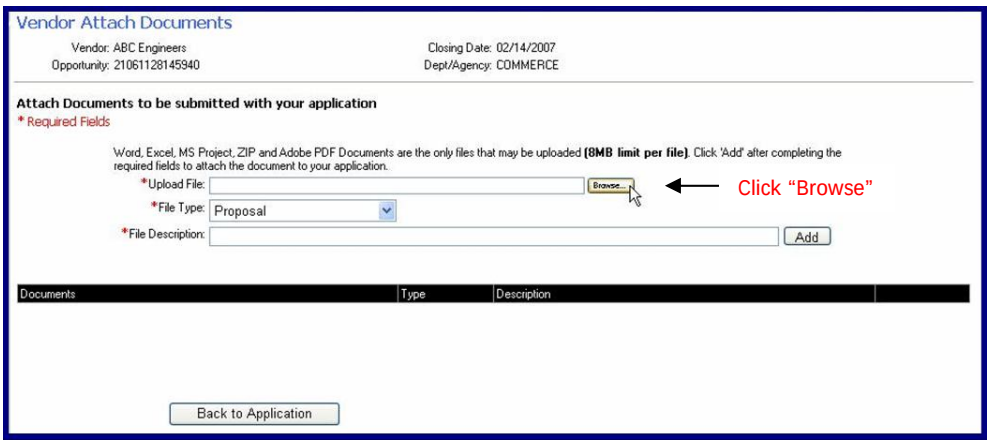


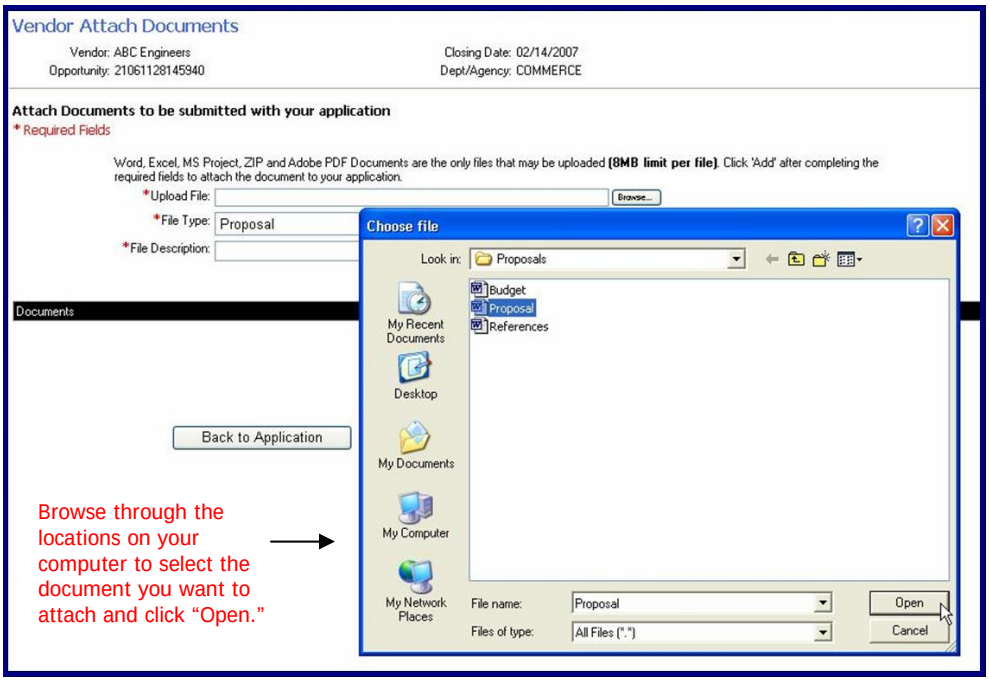
ATTACHMENTS

When you are applying for a specific contract opportunity, you will be able to attach any documents you want to submit as part of your application, such as a proposal, a scope of services, a budget, or work samples. **Documents must be saved in Microsoft Word, Excel, Project, Adobe PDF, or in compressed files and under 8 MB**. If you are unsure of what information to include in your proposal or response, check the contract opportunity documents that are provided as a link on the Opportunity Details page. Many of these links open an Adobe PDF document; please download the free Adobe Reader if you do not already have it on your computer (www.adobe.com).

To attach a document, click on the red symbol next to the Attach Documents area on the Vendor Application page. Clicking on the symbol will take you to the Vendor Attach Documents page (see screen shot below).

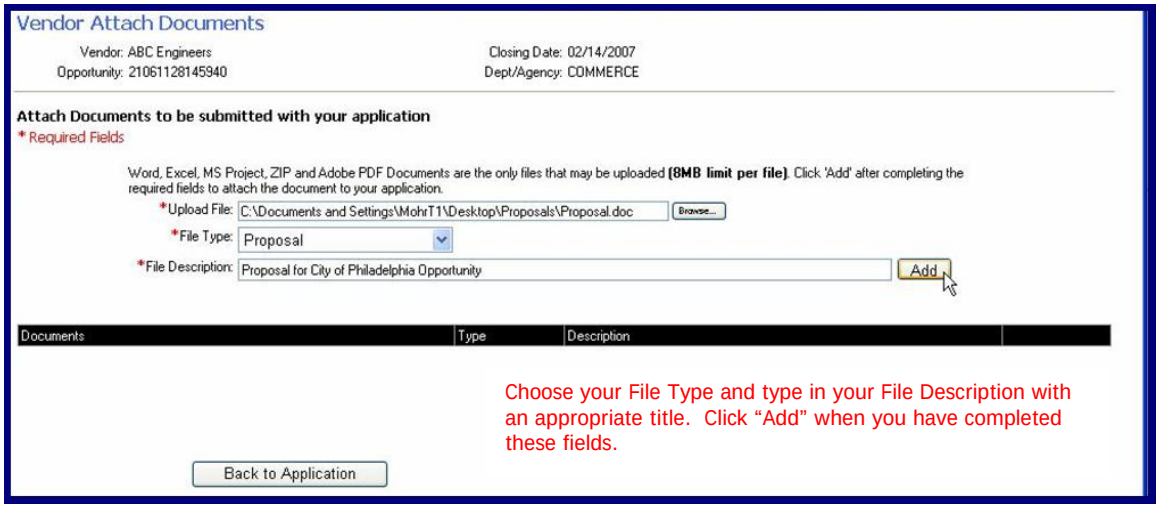
On that page, click on Browse to choose which document you want to attach. A Choose File dialog box will open and you can browse through the locations on your computer to find the document you want to attach. Select the appropriate document and click on it. Then, click "Open" in the dialog box and the file name will appear on your application page.



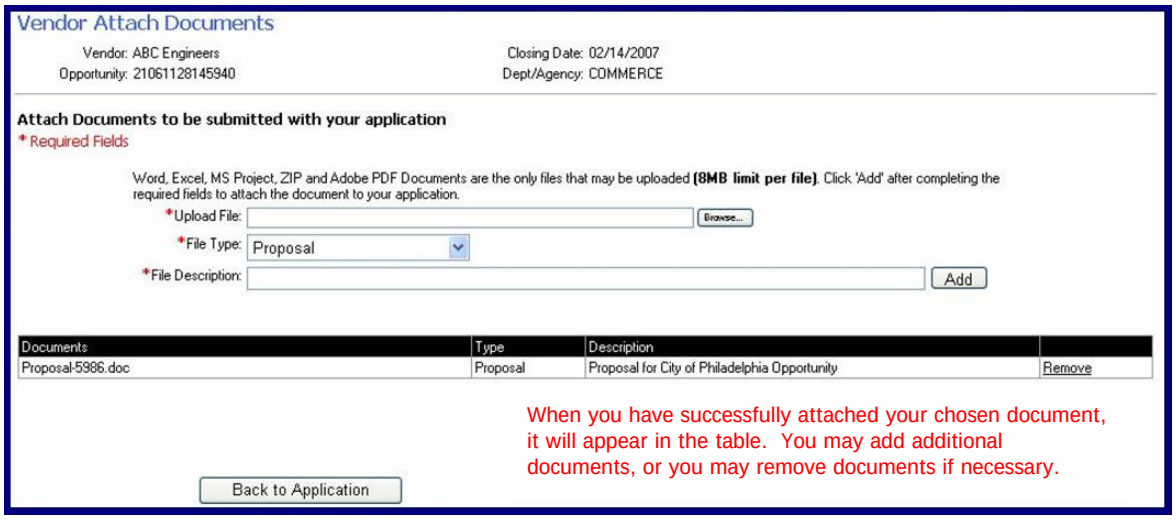


After you click "Open" in the dialog box, the document will appear in the Upload File field on the Attach Documents page. Move to the File Type field. Click on the arrow for the drop-down menu and choose the File Type (proposal, budget or other) you want to associate with your document.

In the File Description field, type in a description of the file you are attaching. Note that you can only attach documents created in Microsoft Word, Microsoft Excel, Microsoft Project, or Adobe PDF, or that are contained in compressed files. Files larger than 8 MB should be split into smaller documents prior to uploading.



Once you have completed the three fields, **you must click Add to complete the attachment**. The information you entered will appear in the table on the Vendor Attach Documents page.



If you added the wrong document, you can easily remove it by clicking Remove in your table of attached documents. You can also return to the Vendor Attach Documents page at any time to remove or attach additional documents until the application deadline. **If you add or delete any attachments after you have submitted your application but before the deadline, you will be required to re-sign and re-submit your application.**

You can verify that you have attached a document by viewing the symbol that appears next to the Attach Documents area on the Vendor Application page. After attaching a document, the red ✖ will change to a blue check mark ✔.

DISCLOSURE FORMS

There are five different disclosure forms that you have to complete and submit as part of your application. You will be able to see whether you have completed a disclosure form by viewing your application for a particular contract opportunity. One of two symbols will appear next to each of the disclosure forms: a red ⊗ means that you have not completed the information for that disclosure form and a blue check mark (✔) means that you have completed the information for that disclosure form. In order to complete a disclosure form, click on the red ⊗ next to the form and will be directed the screen for that form.

DISCLOSURE: Applicant Campaign Contribution

Requirements. Applicants are required to disclose whether they have made any contributions (defined as a provision of money, in-kind assistance, discounts, forbearance or any other valuable thing), during the two years prior to the application deadline[1] for the contract opportunity, to any of the following:

- a candidate for nomination or election to any public office in the Commonwealth of Pennsylvania;
- an incumbent in any public office in the Commonwealth;
- a political committee or state party in the Commonwealth; or
  a group, committee or association organized in support of any candidate, office holder, political committee or state party in the Commonwealth

Required information on each contribution includes:

- Name of Contributor
- Relationship to applicant (system will provide a drop-down menu of choices)
- Name of recipient
- Date of contribution
- Amount of contribution

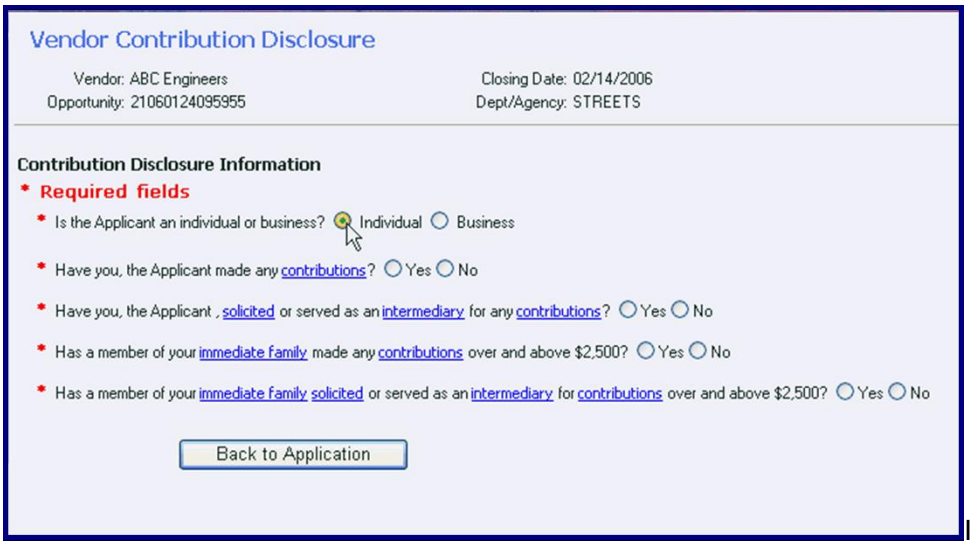
Be sure to read the Disclosure Definitions and the FAQs before filling out this disclosure form so that you understand the terms and the attribution rules that you are required to follow in disclosing contribution information.

You first will be asked to choose whether you are applying for the contract opportunity as an individual or business. Based on your answer, the system will automatically bring up a list of questions that you will have to answer regarding contributions. Some of these

[1] For contract opportunities with the Board of Pensions and Retirement and the Sinking Fund Commission, Pennsylvania Act 44 of 2009 imposes additional disclosure requirements. Please see the Disclosure Overview or FAQs on the eContract Philly website for more information. You can consult the law directly at: http://www.legis.state.pa.us/CFDOCS/Legis/PN/Public/btCheck.cfm?txtType=PDF&sessYr=2009&sessInd=0&billBody=H&billTyp=B&billNbr=1828&pn=2638

questions will ask for campaign contributions given by family members, members of a board of directors, or affiliated businesses. Having all the information you need prior to starting an application will make the process much smoother.

Questions for Individuals



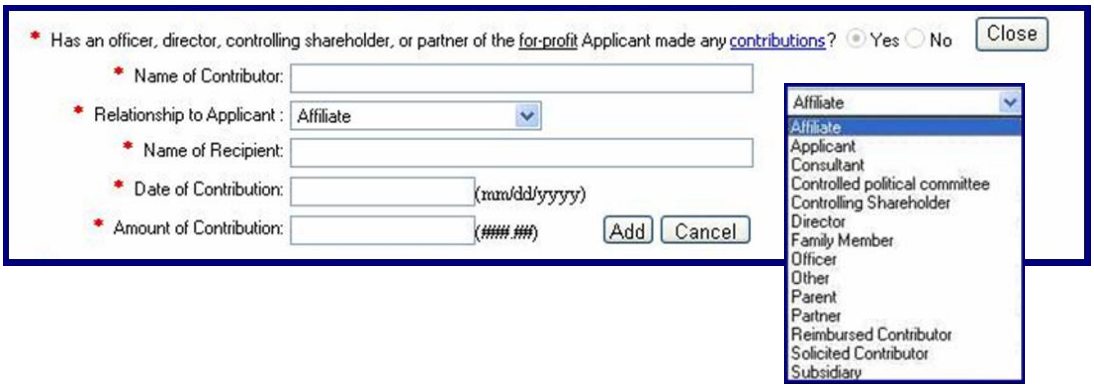
Questions for Businesses

If you or the business you represent made any contributions, select "Yes" for the appropriate question. You will be required to enter information in the fields provided. Once you have entered this information, you must **click "Add" to save the information**. You can disclose more than one contribution for each question simply by entering the information in fields

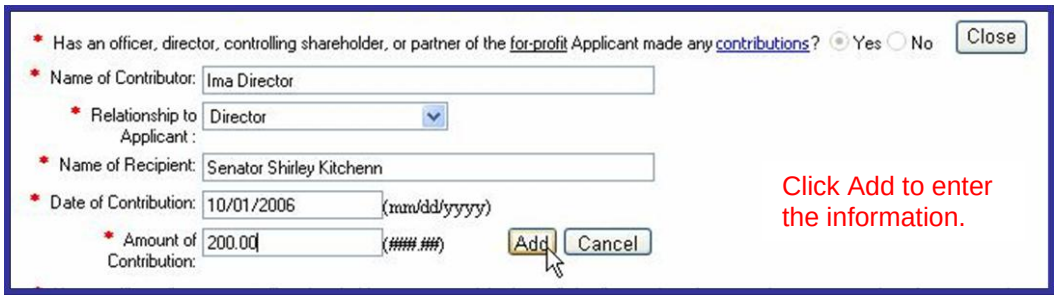
provided and clicking "Add" to save each entry. You can also delete or modify any entry by clicking "Remove" or "Edit" in the table created.

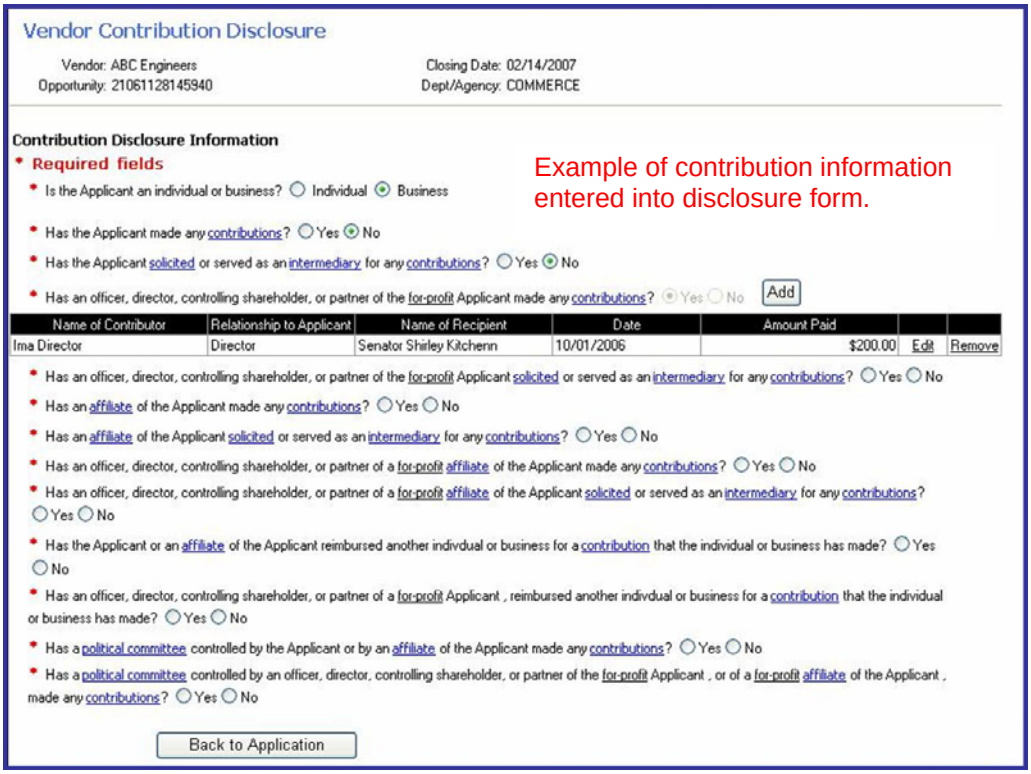
Applicant Campaign Contribution Disclosure (cont'd)

Blank Contribution Fields (Example of Drop-Down Relationship Choices)



Example of Completed Contribution Fields





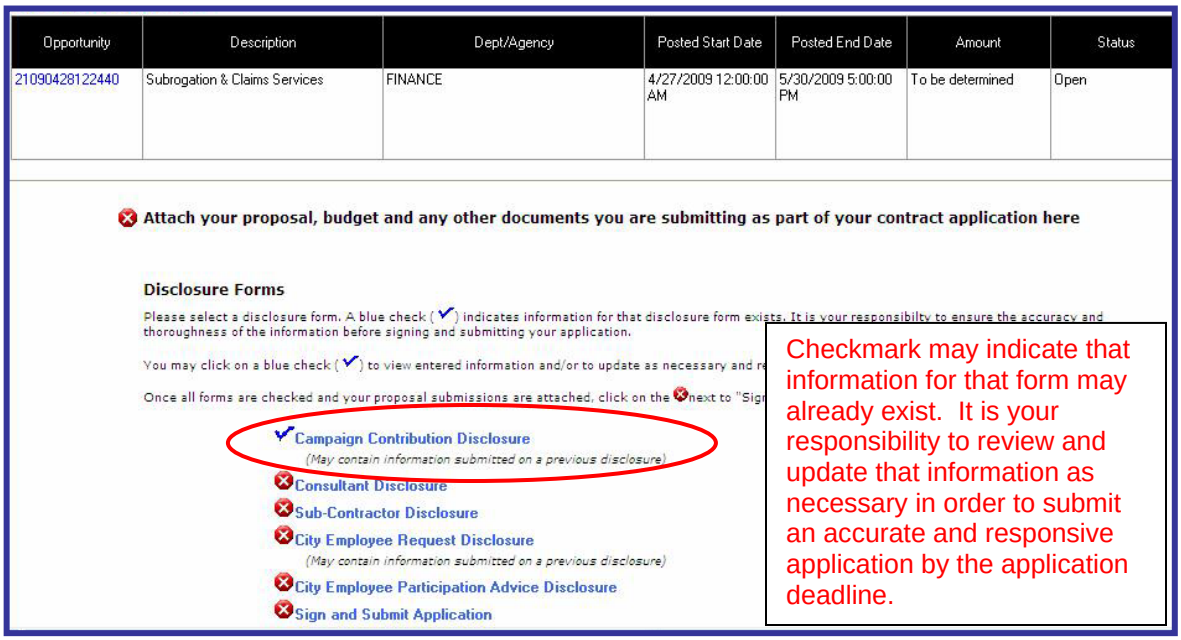
If you or the business you represent did not make any contributions, you are still required to select "No" for each question and will be prompted to certify that you did not make any contributions before you can complete the disclosure form. If you need to, you can change this information at a later point to reflect a contribution by answering "Yes" to

the appropriate question.

Applicant Campaign Contribution Disclosure (cont'd): Copying Contributions

If you or the business organization you represent has ever disclosed contributions on a prior disclosure form, your Applicant Campaign Contribution Disclosure form may already be populated with some information (indicated by a blue check ✔ on the Application Summary page).

Clicking on the check will allow you to review and update the information as necessary. It is your responsibility to ensure the information you submit is accurate and thorough. **Please note that any misstatements or omissions may be reasons to reject an application.**



Opportunity	Description	Dept/Agency	Posted Start Date	Posted End Date	Amount	Status
21090428122440	Subrogation & Claims Services	FINANCE	4/27/2009 12:00:00 AM	5/30/2009 5:00:00 PM	To be determined	Open

Attach your proposal, budget and any other documents you are submitting as part of your contract application here

Disclosure Forms

Please select a disclosure form. A blue check (✔) indicates information for that disclosure form exists. It is your responsibilty to ensure the accuracy and thoroughness of the information before signing and submitting your application.

You may click on a blue check (✔) to view entered information and/or to update as necessary and re

Once all forms are checked and your proposal submissions are attached, click on the ✖ next to "Sign

- ✔ Campaign Contribution Disclosure
  (May contain information submitted on a previous disclosure)
- ✖ Consultant Disclosure
- ✖ Sub-Contractor Disclosure
- ✖ City Employee Request Disclosure
  (May contain information submitted on a previous disclosure)
- ✖ City Employee Participation Advice Disclosure
- ✖ Sign and Submit Application

Checkmark may indicate that information for that form may already exist. It is your responsibility to review and update that information as necessary in order to submit an accurate and responsive application by the application deadline.

In order to update this disclosure form, you may have to change the answer to a question from No to Yes. In order to do so, simply click Yes and then fill out all of the information as it is presented. To add additional disclosures, click Add and fill out all of the information as presented.

Changing Answer from No to Yes

Vendor Contribution Disclosure

Vendor: ABC General Consultant Firm
Opportunity: 21090428122440
Closing Date: 05/30/2009
Dept/Agency: FINANCE

Contribution Disclosure Information

* Required fields

* Is the Applicant an individual or business? ○ Individual ◉ Business

* ○ Yes ◉ No Has the Applicant made any contributions?

* ○ Yes ◉ No Has the Applicant solicited or served as an intermediary for any contributions?

* ◉ Yes ○ No Has an officer, director, controlling shareholder, or partner of the for-profit Applicant made any contributions? See note below. (Non-profit organizations, please select No.) Add

BLUE indicates added within the last 7 days

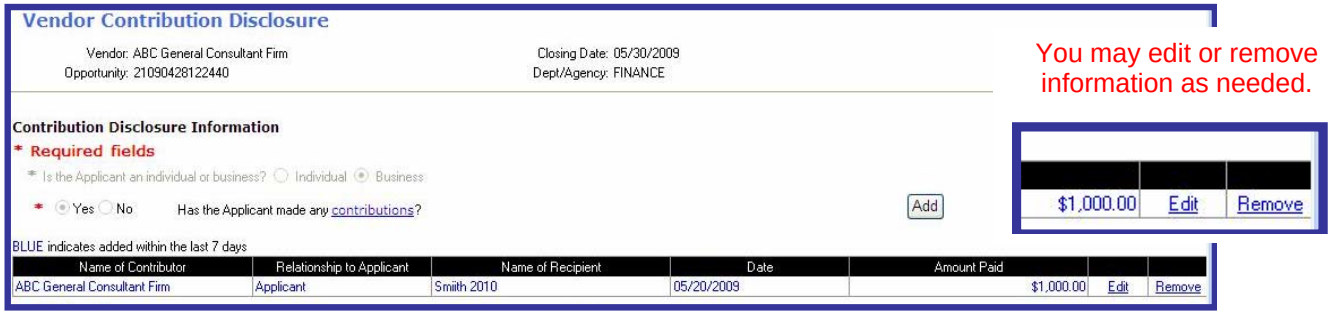
Name of Contributor	Relationship to Applicant	Name of Recipient	Date	Amount Paid		
David McLanden	Officer	Friends of Simon	04/07/2008	$5,500.00	Edit	Remov
David McLanden	Officer	Marcus for Senate	12/04/2007	$1,000.00	Edit	Remov
David McLanden	Officer	Superior Court Judge Sean Thornton	10/11/2007	$1,000.00	Edit	Remov

* ○ Yes ◉ No Has an officer, director, controlling shareholder, or partner of the for-profit Applicant solicited or served as an intermediary for any contributions? See note below. (Non-profit organizations, please select No.)

Adding New Information

Please note that only contributions made within 2 years prior to the current application deadline must be disclosed and only those contributions will be displayed on this form. (Other disclosure forms for older applications, contracts, or under the Update function may include additional contributions outside of the two-year range. The information displayed depends on the original application deadline or when the original disclosure forms were submitted.)

After you have updated the contribution information on your current disclosure, you can edit or remove the most recently-updated information by using those links in the contribution tables, add additional contributions by clicking Add next to any of the questions, and change any previous "No" to a "Yes" in order to provide new information. Once you have completed your update, you may continue to complete the remainder of the disclosure forms.



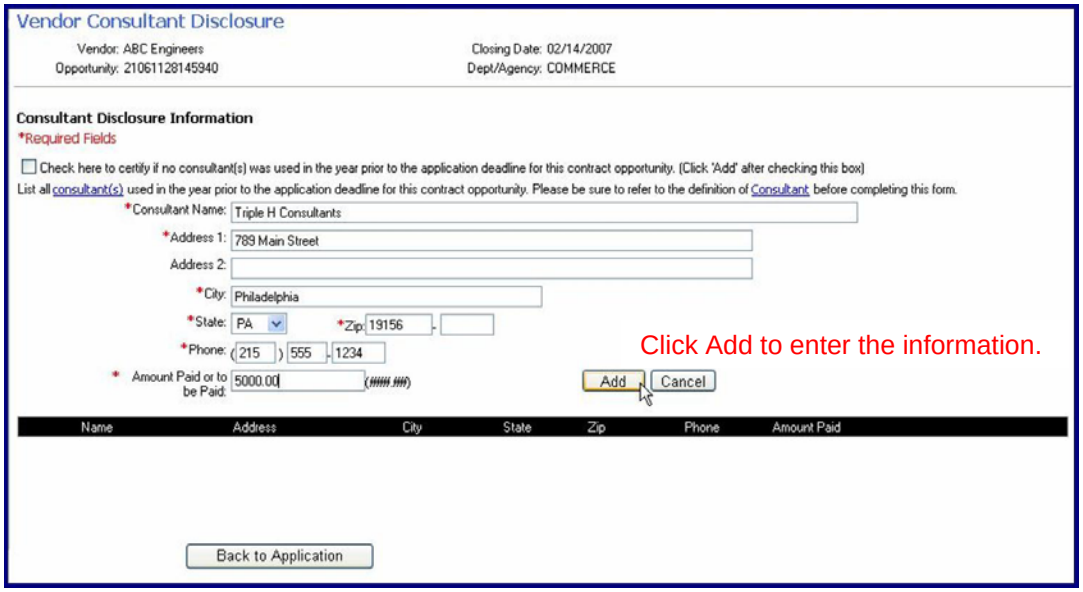
DISCLOSURE: Applicant Use of Consultant

Requirements. Applicants must disclose whether they are using or have used any consultants in the year prior to the application deadline to assist in obtaining the contract for which they are applying.

Required information on each consultant includes:

- Consultant Name
- Business Address
- Phone number
- Amount paid or to be paid

Before you complete this disclosure form, be sure to review the definition of consultant (available on the eContract Philly website and at the end of this Manual).

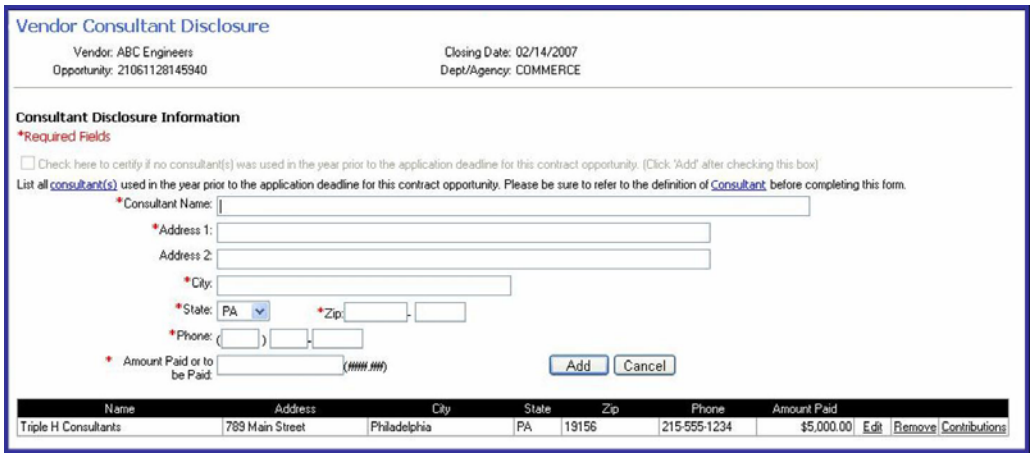


If you or the business you represent have to disclose the use of a consultant, enter the relevant information in the required fields and **click "Add" to save**. You will immediately be presented with a contribution disclosure form for the consultant you have just added. You can either fill out the disclosure form for your consultant at this point (see directions below) or you can click "Back to Consultant Disclosure" to return to the Consultant Contribution Disclosure form at a later time. **You will not be able to submit your application if you do not complete the Consultant Contribution Disclosure form.**

Once back at the Consultant Disclosure form, you can disclose additional consultants by filling out the required fields. You can remove or edit your information by clicking "Remove" or "Edit" next to a particular entry.

If you or the business you represent do not have to disclose the use of a consultant, you have to select the check box to certify that you or the business you represent did not use a consultant. **You must click "Add" to save the information**. This will display "No Consultants Used" in the entry table at the bottom of the form. If, at a later point, you have to add a consultant, first remove the "No Consultants Used" entry and then add any consultant information.

Applicant Use of Consultant Disclosure (cont'd)



In order for this form to be considered complete, the table at the bottom of the form must either display the name and information of the consultant used or an entry that says "No Consultant Used."

Note that the disclosure of a consultant also requires disclosure of that consultant's campaign contributions. If you disclose the use of a consultant, this form will not be considered complete until you complete the contribution disclosure form on behalf of your consultant.

DISCLOSURE: Consultant Contribution

Requirements. Applicants must disclose, on behalf of each consultant used, whether the consultant made any contributions (defined as a provision of money, in-kind assistance, discounts, forbearance or any other valuable thing), during the <u>two years prior to the application deadline</u> for the contract opportunity, to any of the following:

- a candidate for nomination or election to any public office in the Commonwealth of Pennsylvania;
- an incumbent in any public office in the Commonwealth;
- a political committee or state party in the Commonwealth; or
- a group, committee or association organized in support of any candidate, office holder, political committee or state party in the Commonwealth

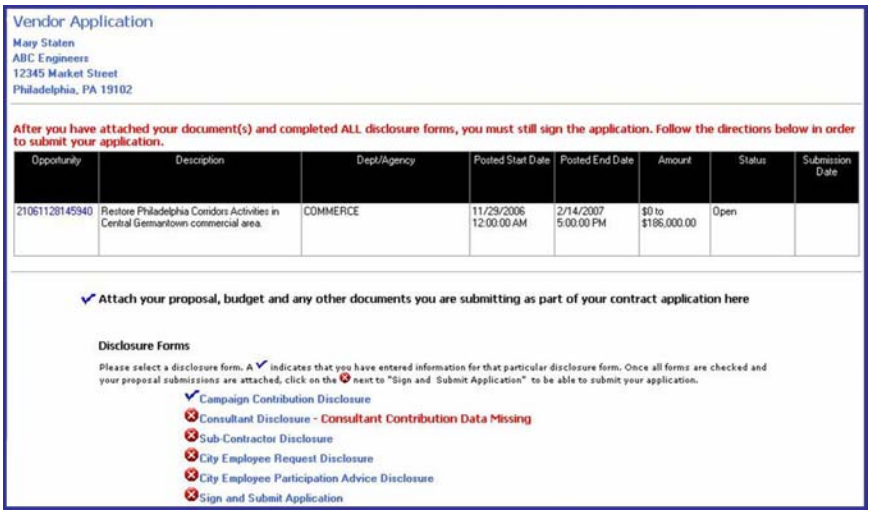
Required information on each contribution includes:

- Name of Contributor
- Relationship to consultant (system will provide a drop-down menu of choices)
- Name of recipient
- Date of contribution
- Amount of contribution

You only have to disclose this information if you or the business you represent have used or are using a consultant. Once you have submitted the basic information for the Consultant Disclosure form, you will be automatically sent to the Consultant Contribution Disclosure form. If you choose to fill out this disclosure form at a later time, you can return to it by selecting "Contributions" listed with the consultant information on your Consultant Disclosure form.

You will be asked to choose whether your consultant is an individual or business. Based on your answer, the system will automatically bring up a list of questions that you will have to answer on behalf of your consultant. These questions are similar to those in the Applicant Contribution Disclosure Form.

If your consultant made contributions, select "Yes" for the appropriate question and you will be required to enter information in the fields provided. Once you've entered this information, you must **click "Add" to save the information**. You can disclose more than one contribution for each question by clicking "Add" to save each entry. You can also delete any entry by clicking "Remove" or change information by clicking "Edit".



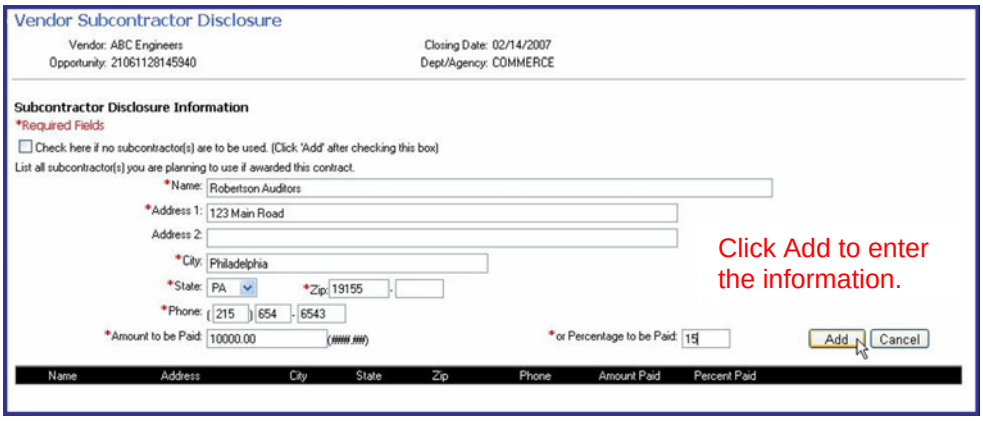
If your consultant did not make any contributions, you are required to select "No" for each question and will be prompted to certify that the consultant did not make any contributions before the information will be saved. If you need to, you can change this information at a later point to reflect a contribution by answering "Yes" to the appropriate question.

If you do not complete a campaign contribution disclosure form, your Consultant Disclosure form will not be considered complete and you will receive a message on your online application saying that the "Consultant Contribution Data is Missing."

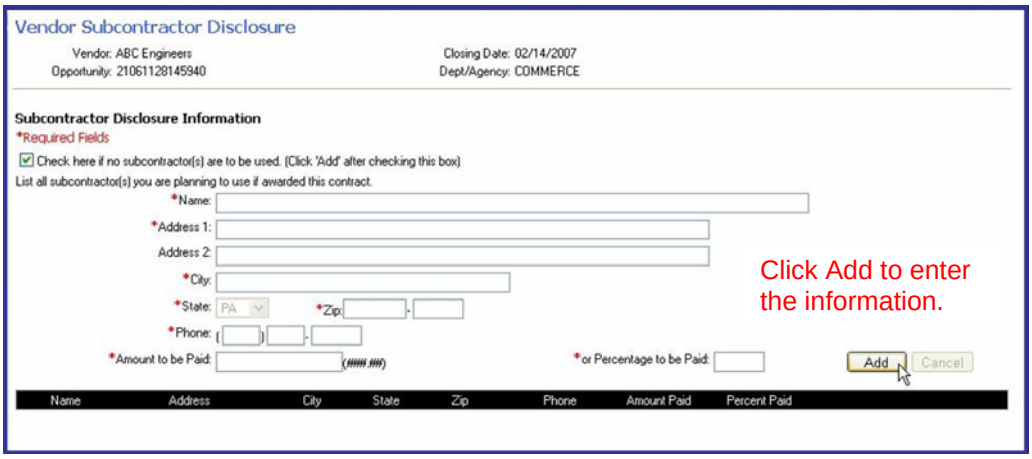
DISCLOSURE: Applicant Proposed Use of Subcontractor

Requirements. Applicants must disclose whether they plan on using any subcontractors if awarded the contract for which they are applying. Required information on each subcontractor includes:

- Subcontractor Name
- Business Address
- Phone number
- Amount <u>or</u> percentage of contract to be paid

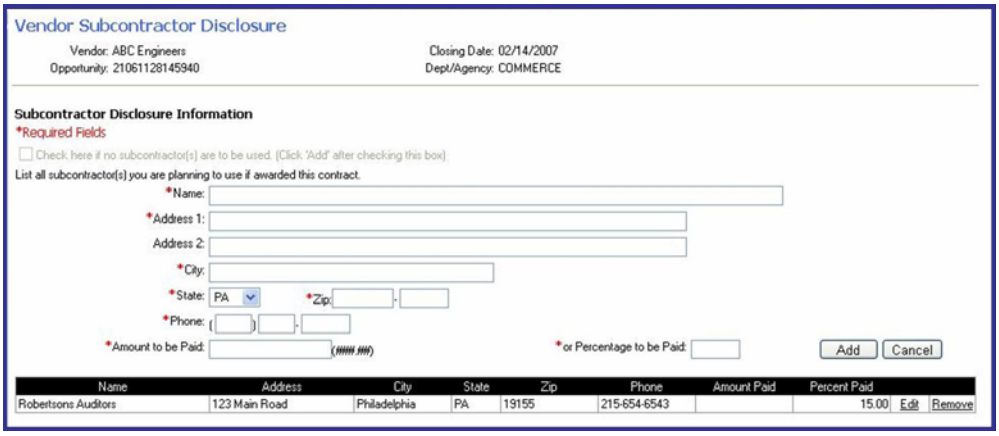


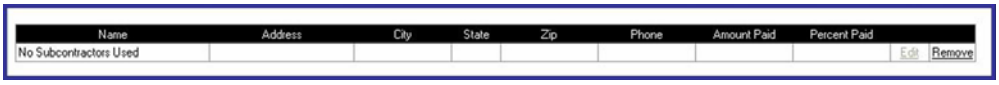
If you or the business you represent plan to use a subcontractor on the contract for which you are applying, enter the relevant information in the required fields and **click "Add" to save**. You can disclose more than one subcontractor simply by entering the required information in each field and clicking "Add" to save each entry. You can also delete any entry by clicking "Remove" or change information by clicking "Edit".



If you or the business you represent do not intend to use a subcontractor, you have to select the check box to state that you or the business you represent do not plan to use a subcontractor. **You must click "Add" to save the information**. This will display "No Subcontractors Used" in the entry table at the bottom of the form. If, at a later point, you want to add a subcontractor, you must first remove the "No Subcontractors Used" entry before you will be able to add subcontractor information.

Applicant Proposed Use of Subcontractor Disclosure (cont'd)



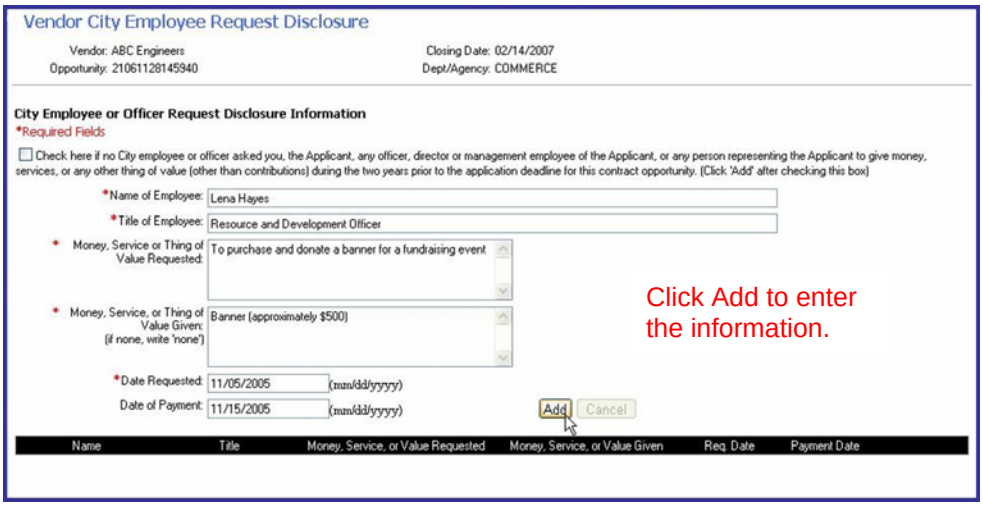


In order for this form to be considered complete, the table at the bottom of the form must either display information about the subcontractor to be used or an entry that says "No Subcontractors Used."

DISCLOSURE: City Employee Request

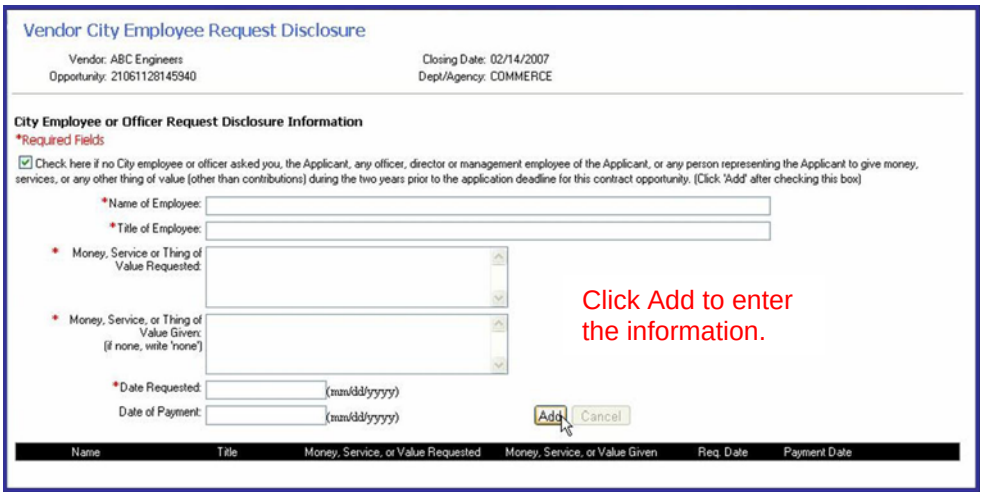
Requirements. Applicants must disclose whether a City employee or officer asked the applicant, any officer, director or management employee of the applicant, or any individual or business representing the applicant to provide money, services, or any other thing of value to be paid or provided to any person or business (other than contributions) during the two years prior to the application deadline. Required information on each request includes:

- Name of employee or officer
- Title of employee or officer
- Money, service, or thing of value requested
- Money, service, or thing of value given
- Date of request
- Date of payment



If you or the business you represent have to disclose a request made by a City employee or officer, enter the relevant information in the required fields and **click "Add" to save**. You can disclose more than one request by entering the required information in each field and **clicking "Add" to save each entry.** You can also delete any entry by clicking "Remove" or change information by clicking "Edit".

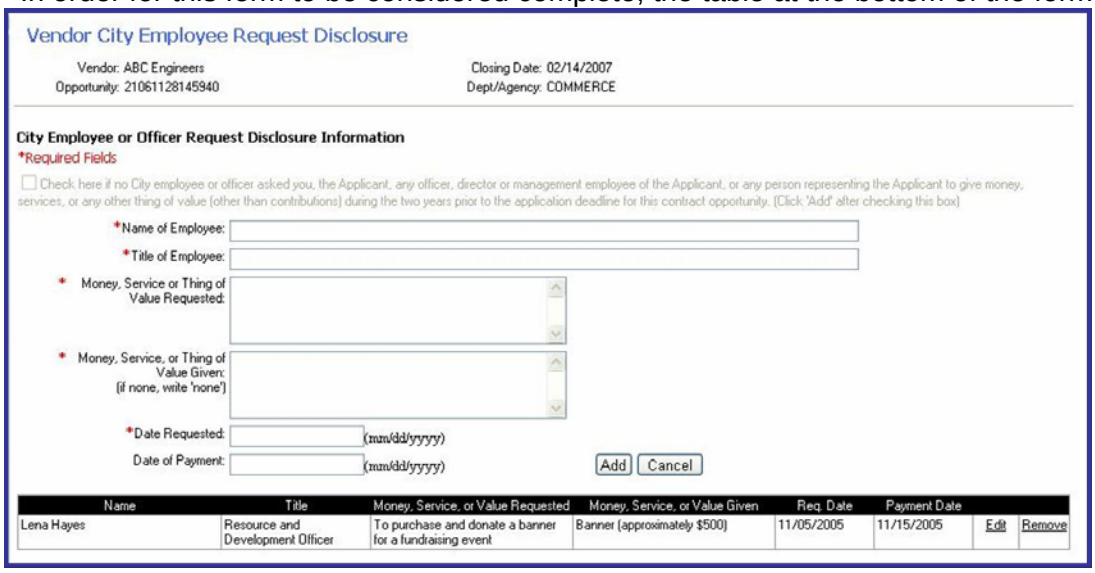
City Employee Request Disclosure (cont'd)



Click Add to enter the information.

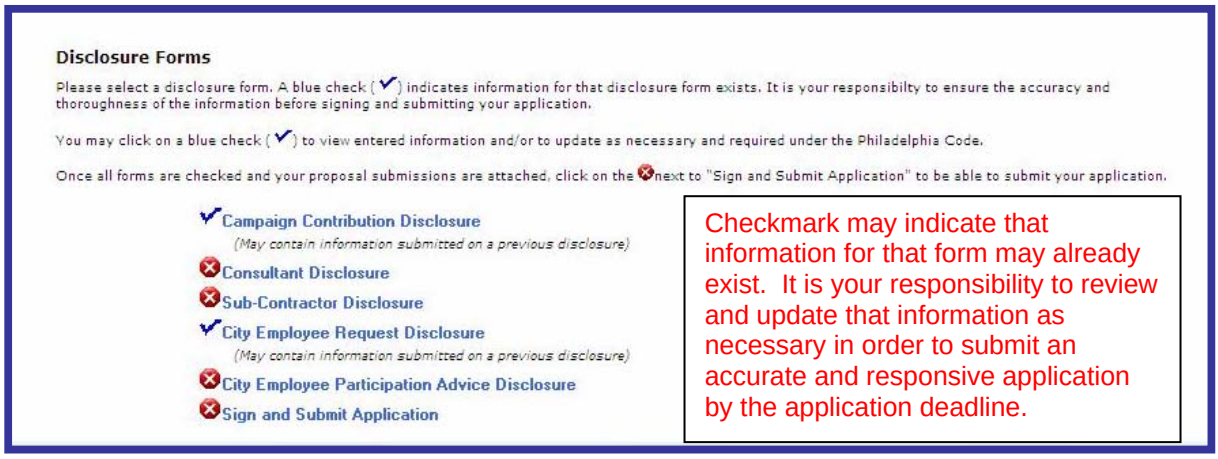
If you or the business you represent do not have to disclose any requests, select the check box to enter this information. **You must click "Add" to save the information**. This will display "No request from any City employee or officer" in the entry table at the bottom of the form. If, at a later point, you have to add information on a request, you must first remove the "No request from any City employee or officer" entry before you will be able to add information on any request.

In order for this form to be considered complete, the table at the bottom of the form must either display information about the request or an entry that says "No request from any City employee or officer."

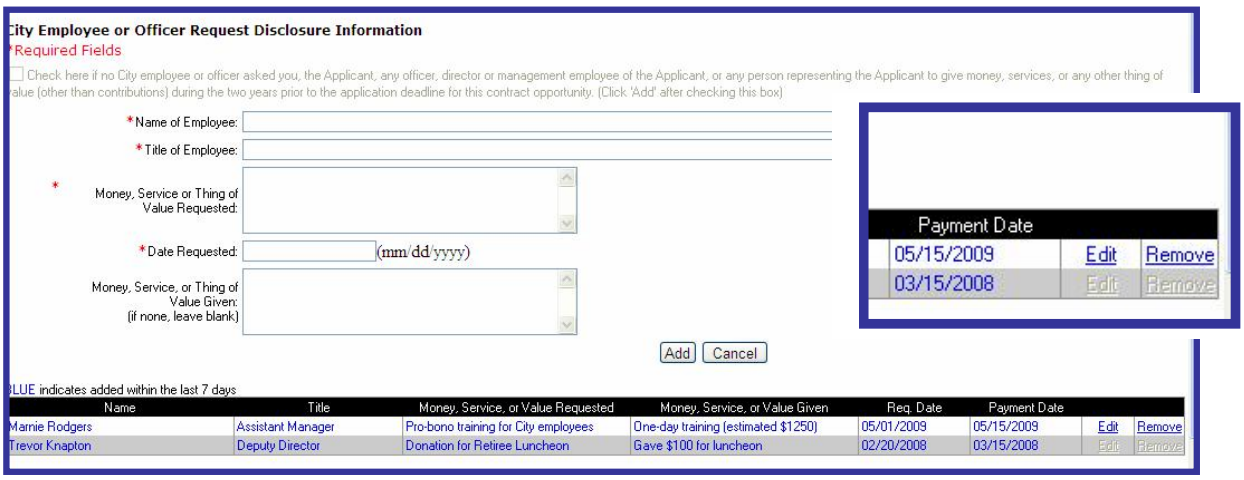


If you or the business organization you represent has ever disclosed requests on a prior disclosure form, your City Employee Request Disclosure form may already be populated with some information (indicated by a blue check ✔ on the Application Summary page).

Clicking on the check will allow you to review and update the information as necessary. It is your responsibility to ensure the information you submit is accurate and thorough. Please note that any misstatements or omissions may be reasons to reject an application.



If you have to disclose additional requests from City employees or officials, you must use this form to provide the necessary information. Please review the previous page to see how you add new requests. Only requests received within 2 years prior to the current application deadline must be disclosed and only those requests will be displayed on this form. (Other disclosure forms for older applications, contracts, or under the Update function may include additional requests outside of the two-year range. The information displayed depends on the original application deadline or when the original disclosure forms were submitted.)



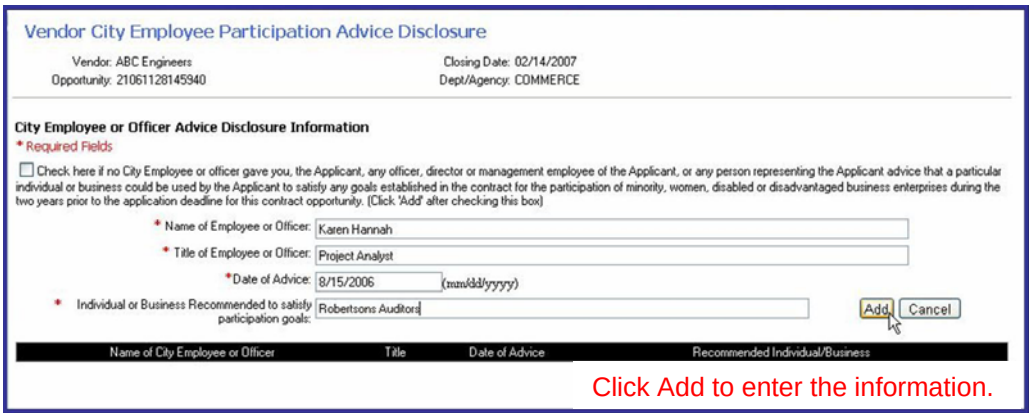
After you have updated the request information on your current disclosure, you can edit or remove the most recently-updated information by using those links in the request tables, add additional contributions by clicking Add next to any of the questions, and change any previous

"No" to a "Yes" in order to provide new information. Once you have completed your update, you may continue to complete the remainder of the disclosure forms.

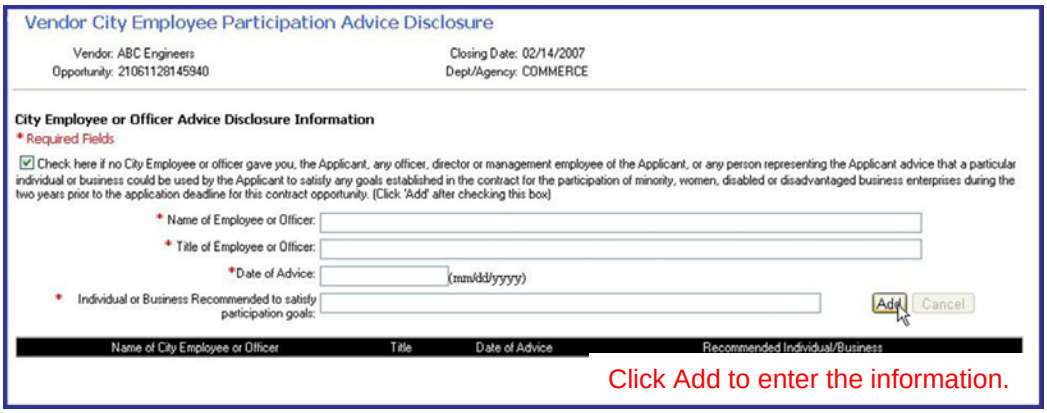
DISCLOSURE: City Employee Participation Advice

Requirements. Applicants must disclose whether a City employee or officer provided the applicant, any officer, director or management employee of the applicant, or any individual or business representing the applicant with advice on how to satisfy minority, women, disabled, or disadvantaged business participation goals, during the two years prior to the application deadline. Required information on the advice includes:

- Name of employee or officer
- Title of employee or officer
- Date of advice
- Name of recommended individual(s) or business(es)

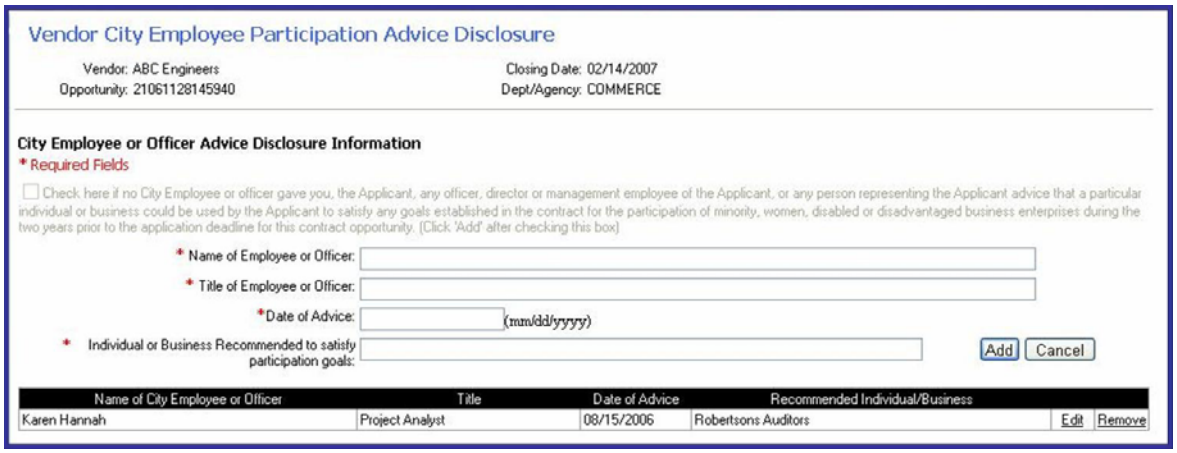


If you or the business you represent have to disclose advice given by a City employee or officer, enter the relevant information in the required fields and **click "Add" to save**. You can disclose more than one recommendation by entering the required information in each field and **clicking "Add" to save each entry**. You can also delete any entry by clicking "Remove" or change information by clicking "Edit".



If you or the business you represent do not have to disclose any advice given by a City employee or officer, you have to select the check box. **You must click "Add" to save the information**. This will display "No advice from any City employee or officer" in the entry table at the bottom of the form. If, at a later point, you have to add information on a recommendation, you must first remove the "No advice from any City employee or officer" entry before you will be able to add a recommendation.

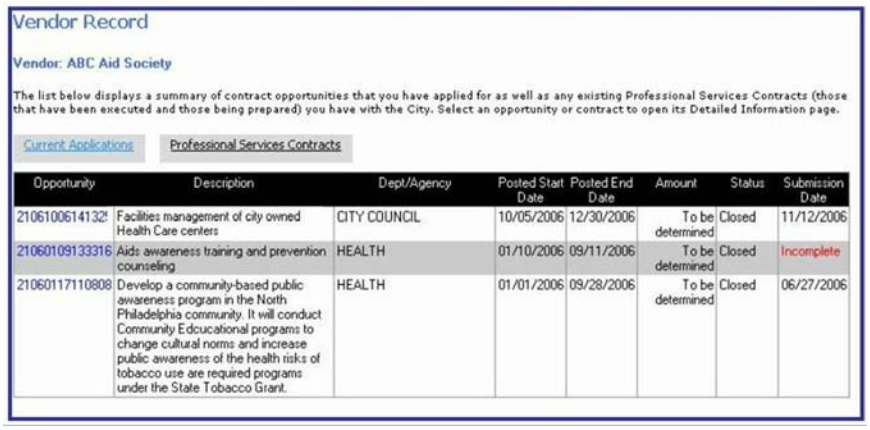
In order for this form to be considered complete, the table at the bottom of the form must either display information about the advice or an entry that says “No advice from any City employee or officer.”



Sign and Submit

Once you have completed all of your disclosures forms, **you must sign your application and submit it for consideration.** The sign and submit area is listed with the disclosure forms and is accompanied by a red ✖, until you have successfully signed and submitted the application. In order to access the sign and submit area, you must complete all application requirements first: attaching response documents (if applying for an opportunity) and completing the disclosure forms. In other words, the other areas must be preceded by a blue check mark (✔) before you can sign and submit.

Once you sign your application (which does not require any special software) and click the submit button, you will be directed to a page confirming that your application has been received. You may print this confirmation for your records. A confirmation will also be sent to the email address of the User who submitted the application.



You may confirm that your application has been submitted by looking at the “Status” column on the *Current Applications* list in your *Vendor Record*. If your application has been submitted successfully and has been received by the City of Philadelphia, that field will display the date the application was submitted. If it has not

been submitted correctly, the field will display “Incomplete.”

APPLICATION CHECKLIST

To submit an application, make sure that you have completed the following application requirements:

- ✔ Attached Documents (e.g. proposal, scope of services, budget, work samples, references)
- ✔ Applicant Campaign Contribution Disclosure Form
- ✔ Consultant Disclosure Form
- ✔ Consultant Contribution Form (when applicable)
- ✔ Subcontractor Disclosure Form
- ✔ City Employee Request Disclosure Form
- ✔ City Employee Participation Advice Disclosure Form
- ✔ Sign and Submit

SAVING / MODIFYING APPLICATIONS

Saving Applications
If you have not completed your application and wish to finish it at a later time, you can logout and the information you have provided will be saved automatically. When you are ready to complete the application, login to access your *Vendor Record* using your email address and password. You will be taken directly to your *Current Applications* list. Click on the opportunity number of the application you want to complete and you will be taken to your application form.

Modifying Applications
Once you have completed your application, including all disclosure forms, and attached the documents you want to submit, you must click on the *Sign and Submit* section to submit your application. **In order for an application to be considered valid and responsive, it must be properly signed and submitted by the applicant. Applications that are not signed cannot be submitted and will not be considered.** Once you have signed the application, which requires the authorized signatory(ies) to type in his/her name(s), the “Submit” button will be enabled and you can submit your application electronically to the City of Philadelphia.

Once you have successfully submitted your application, you will receive an email confirming that your application has been received. You can also check to make sure your application has been submitted by looking at the *Status* column on the *Current Application* list in your *Vendor Record*. If your application has been submitted successfully and has been received by the City of Philadelphia, that field will display the date the application was submitted. If you did not successfully submit your application, the status column will display “Incomplete.”

Until the application deadline passes, you can modify any part of your application. For example, you can replace or add a subcontractor. **Modifying any part of a submitted application will cause your application to be withdrawn; you must re-sign and re-submit your application for it to be considered.**

Once the application deadline passes, you cannot immediately modify or update any information.

NOTICES OF INTENT TO CONTRACT

You can view notices of intent to contract (or departments' preliminary decisions on winning applicants) on the eContract Philly website under Notices of Intent to Contract. Clicking on an notice announcement will take you to a detailed Notice of Intent to Contract that lists the names of all applicants for the contract opportunity, the name of the applicant awarded the contract, and the basis for the award.

UPDATING YOUR DISCLOSURE FORMS

After the application deadline passes, you will not be able to immediately modify or update any information related to that contract opportunity. However, if you are awarded the contract, you will be required to maintain and update for the term of the contract and one year afterward the following information within five days of a reportable event:

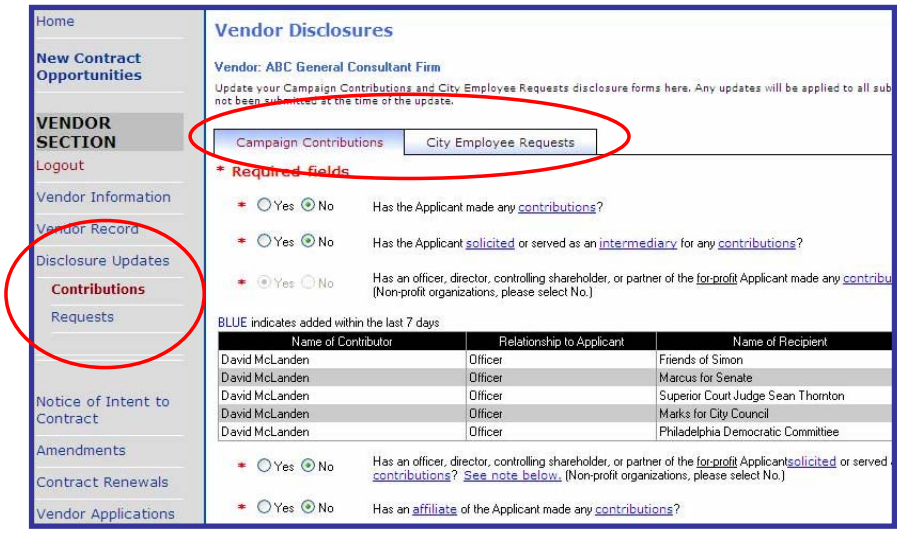
- Applicant/Contractor campaign contributions
- Consultant contributions
- Subcontractors
- Employee requests for goods, services, or any other thing of value
- Employee advice regarding minority, women, disabled, or disadvantaged business participation goals (updates required for the term of the contract only)

For more information on disclosure update requirements, please consult your contract general provisions, review the information on the eContract Philly website (under the Disclosure/Eligibility link), or contact the eContract Philly help staff at econtractphilly@phila.gov or 215-686-4914.

UPDATE DISCLOSURE: Campaign Contribution and City Employee Participation Advice

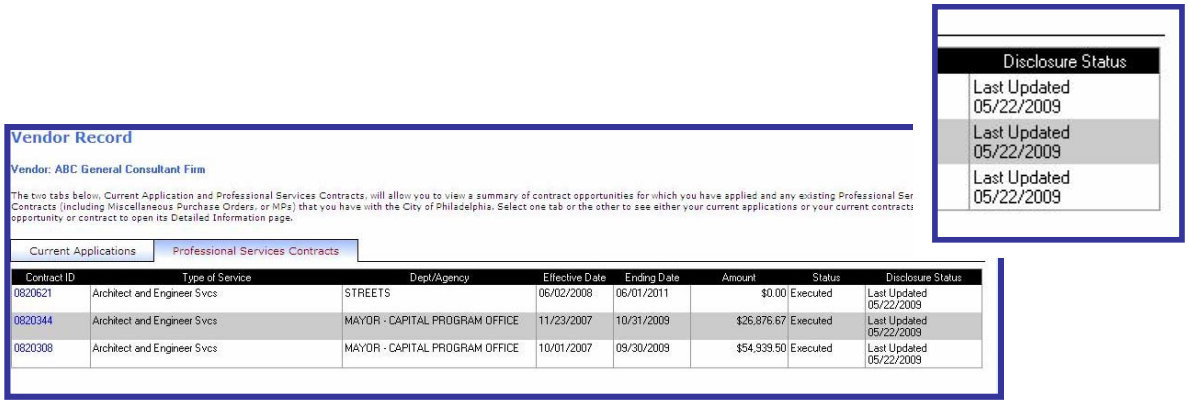
The Campaign Contribution and City Employee Request disclosure forms ask for general information that applies to all contracts and applications for contract opportunities. Because of this, you can update these disclosure forms for all of your contracts and applications through the Disclosure Update feature described here.

In order to update your Campaign Contribution and City Employee Request disclosure forms, you have to login to your Vendor Record and click on Disclosure Updates on the left-side navigation bar. You can select to view and update either disclosure form from the navigation bar or from



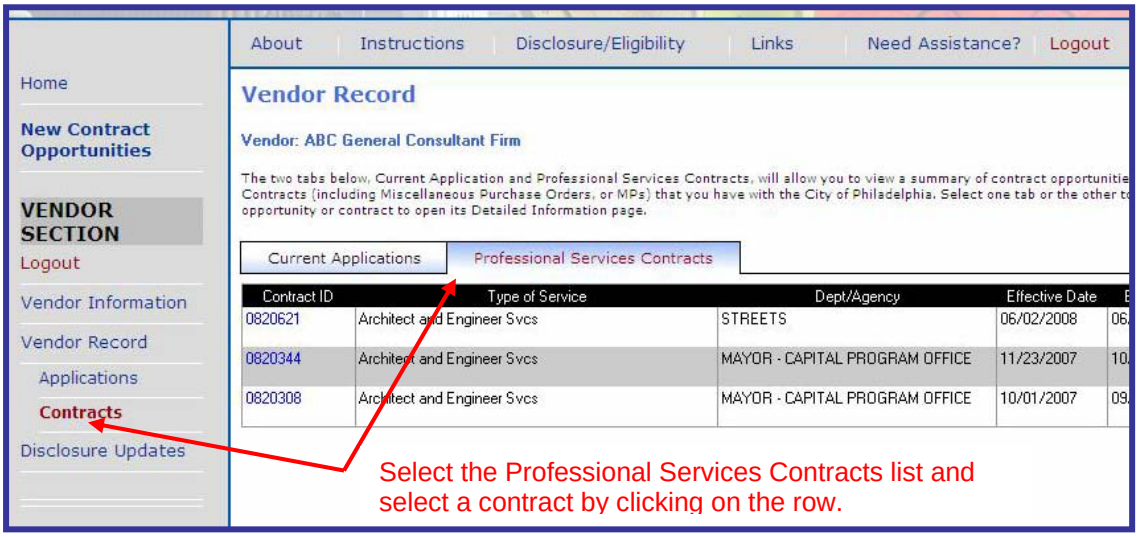
the tabs provided in the main space.

When you update these two forms here, the system will apply the updates to the disclosure forms for all current contracts and for any current applications. Your Vendor Record will indicate when the forms were last updated so that you can better manage your updates.

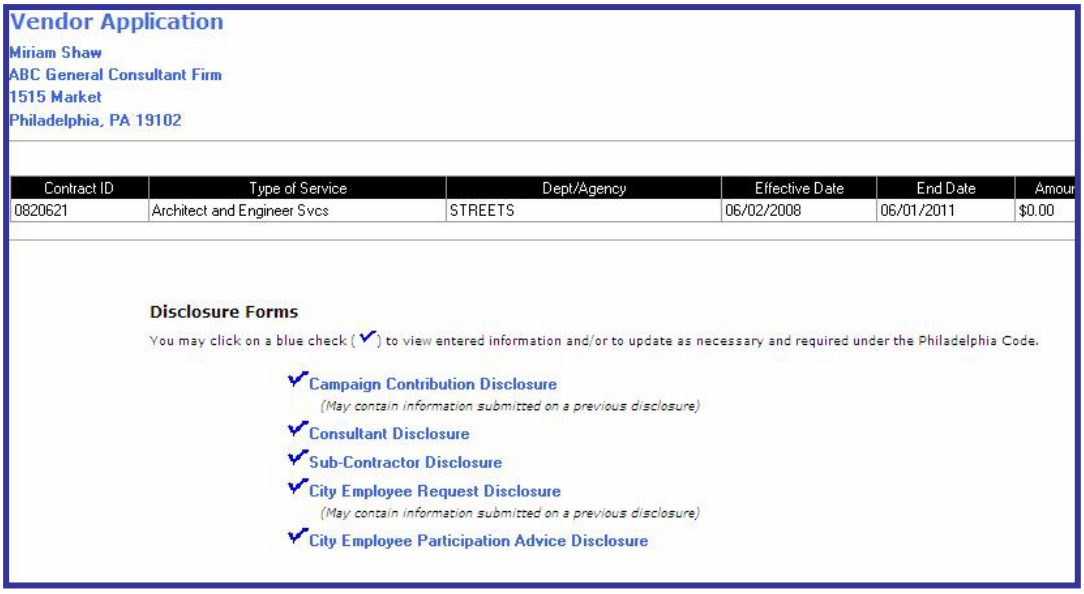


UPDATE DISCLOSURE: Consultant, Consultant Contribution, Subcontractor, and Employee Participation Advice

Because these disclosure forms are unique to each contract (e.g. the advice you may have received on how to satisfy business participation goals on a particular contract will differ from the advice received on another contract), you must update these disclosure forms specifically for each contract. In order to do so, you must login to your Vendor Record, make sure you select your Professional Services Contracts list under your Vendor Record. Select the contract for which you have to disclose new information by clicking on the row.

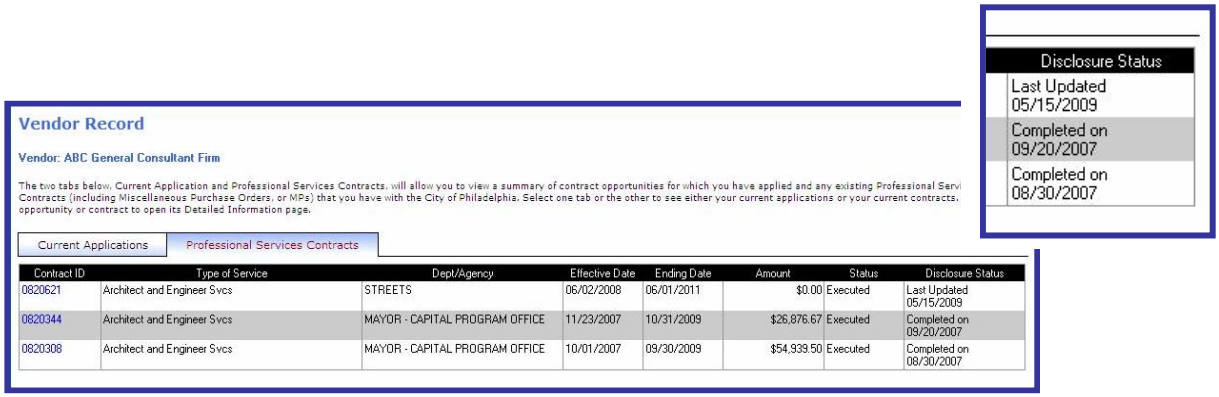


Click on a blue check to update that particular form.



Updating the forms is similar to completing them initially. Review pages 15-28 as a reminder on how to add and save new disclosure information. Note that you must update your Campaign Contribution and City Employee Request disclosure forms via the Disclosure Update function explained above.

Your Vendor Record will indicate when the forms were last updated so that you can better manage your updates.



Office of Economic Opportunity (OEO)

Established in 1982 as the Minority Business Enterprise Council (or MBEC), the Office of Economic Opportunity (OEO) promotes the economic development of Minority ("MBE"), Women ("WBE"), and Disabled ("DSBE") owned business enterprises (collectively referred to as "M/W/DSBEs") by ensuring that they are accorded equal access and opportunity to compete for and secure contracts with the City of Philadelphia. OEO does this through its certification

program, contract review and monitoring activities, and ongoing collaboration with City departments, quasi-public agencies and the business sector.

OEO can provide assistance to vendors interested in applying for contracts with the City of Philadelphia. In cases where a contract opportunity with the City of Philadelphia has benchmarks for the participation of M/W/DSBEs, OEO can assist vendors with satisfying contract participation goals either through certifying a vendor as a M/W/DSBE vendor or by recommending a certified vendor for collaboration on a particular contract opportunity.

For more information on certification or in receiving recommendations for collaborative partners, visit the OEO website (http://mbec.phila.gov/home) or call 215-686-6232 for more information.

ACCESS TO COMPUTERS

There are free computer terminals for vendors without access to computers at the following locations:

- Any Philadelphia Free Library location (the library system has over 600 terminals)
- The Northeast Municipal Service Center at 9239 Rear Roosevelt Blvd
- Computer terminals at the Public Information Room of the Records Department, Room 154, City Hall

Computer terminals are also available at the Enterprise Center, 4548 Market Street. Please call 215-895-4000 for more information prior to visiting the Center.

The application process does require that you have an active, valid email address. Several websites provide free email accounts.

If you need assistance with using a computer or navigating the Internet, visit your local branch of the Philadelphia Free Library and staff will assist you.

HAVE QUESTIONS?

If you have questions about a particular contract opportunity, you should email or call the contact(s) listed with that opportunity.

If you have questions about registration, the application process, or the website in general, please email econtractphilly@phila.gov or call 215-686-4914.

Appendix

Disclosure Definitions	
These definitions are intended to assist applicants with filling out the disclosure forms only. Some of these definitions may differ from the definitions listed in Chapter 17-1400.	
Affiliate	A parent, subsidiary, or otherwise affiliated entity of a business
Applicant	An individual or business who has filed an application to be awarded a non competitively bid contract
Affiliated Entity	Any of the following: 1) a subsidiary or holding company of a lobbying firm or other business entity owned in whole or in part by a lobbying firm; 2) an organization under section 501(c) of the Internal Revenue Code of 1986 (Public Law 99-514, 26 U.S. §501(c)) established by a lobbyist or a lobbying firm or an affiliated entity. (Definition provided in Chapter 7-A of Pennsylvania Act 44 of 2009)
Business	A corporation, limited liability company, partnership, association, joint venture or any other legal entity (including non-profit organizations)
Candidate	Any individual who seeks nomination or election to public office, other than a judge of elections or inspector of elections, whether or not such individual is nominated or elected. An individual shall be deemed to be seeking nomination or election to such office if he or she has (1) received a contribution or made an expenditure or has given his consent for any other person or committee to receive a contribution or make an expenditure, for the purpose of influencing his or her nomination or election to such office, whether or not the individual has made known the specific office for which he or she will seek nomination or election at the time the contribution is received or the expenditure is made; or (2) taken the action necessary under the laws of the Commonwealth of Pennsylvania to qualify himself or herself for nomination or election to such office.
Consultant	An individual or business used by an applicant or contractor to assist in obtaining a non competitively bid contract through direct or indirect communication by such individual or business with any city agency or any city officer or employee, if the communications is undertaken in exchange for, or with the understanding of receiving, payment from the applicant or

	contractor or any other individual or business (however, "Consultant" shall not include a full-time employee of the Applicant or Contractor)
Contractor	An individual or business who has entered into a non competitively bid contract with a city agency
Contributions	The provision of money, in-kind assistance, discounts, forbearance or any other valuable thing, during the two years prior to the deadline for the filing of the application for the contract opportunity, to any of the following: – a candidate for nomination or election to any public office in the Commonwealth of Pennsylvania; – an incumbent in any public office in the Commonwealth; – a political committee or state party in the Commonwealth; or – a group, committee or association organized in support of any candidate, office holder, political committee or state party in the Commonwealth.
Executive-Level Employee	An employee of a business or the businesses affiliated entity who: 1) can affect or influence the outcome of the business's or affiliated entity's actions, policies, or decisions relating to pensions and the conduct of business with a municipality or a municipal pension system; or 2) is directly involved in the implementation or development of policies relating to pensions, investments, contracts or procurement or to the conduct of business with a municipality or a municipal pensions system. (Definition provided in Chapter 7-A of Pennsylvania Act 44 of 2009)
Immediate family	A spouse or life partner residing in the individual's household or minor dependent children
Incumbent	An individual who holds elective office
Intermediary	An individual or business, who, other than in the regular course of business as a postal, delivery or messenger service, delivers a contribution from another individual or business to the recipient of such contribution
Political committee	Any committee, club, association or other group of persons which receives money or makes expenditures for purposes of influencing any election

Solicit a Contribution	Requesting or suggesting that a person make a contribution. The sponsoring or hosting of a fundraising event is considered soliciting a contribution from the attendees of the event. Any contributions raised at such event are counted as a contribution made by the host of the event.