**United Planning Organization**

**REQUEST FOR QUALIFICATIONS**

**RFQ #0040**

**PROPOSAL EVALUATION SERVICES**

# COVER PAGE

|  |
| --- |
| **Solicitation Issue Date: Monday, October 14, 2024** |
| **Solicitation Closing Date: OPEN & CONTINUOUS** | **Solicitation Closing Time: OPEN & CONTINUOUS** |
| **Issued By: United Planning Organization (UPO)** |
| **Address: 301, Rhode Island Ave, NW, Washington, DC 20001** |
| **Telephone Number: 202-238-4600** |
| UPO is a non-profit agency in the District of Columbia and is exempt from any local, state or federal taxes. |
| Unless otherwise stated, all quoted prices shall be Free on Board (FOB) headquarter address inside |
| Proposals must be received by UPO Procurement Office at procurement@upo.org . Early submissions will be appreciated.  |
| **Electronic responses:** Please submit your proposal to procurement@upo.org referencing “**Proposal Evaluation Services – RFQ#0040**” in the subject line. *DO NOT send questions to this email address. This is for receiving proposals only and this is not monitored on regular basis.* |
| For questions/information, please email at rhaque@upo.org referencing **“Proposal Evaluation Services – RFQ #0040”** in the subject line. *Questions sent to* *procurement@upo.org* *will not be answered.*  |
| Payment Term: N-30, after 30 days upon receipt of invoices by the Accounts Payable office of UPO Fonance Division. |
| United Planning Organization reserves the right to waive informalities or irregularities, to reject any or all proposals received, to accept the proposal deemed best for the organization, and/or request new proposals, if necessary. |
| Any objection to the above conditions must be clearly indicated in the proposal. |
| In compliance with this RFQ and to all the conditions imposed herein, the undersigned offers and agrees to furnish the services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation. |
| **VENDOR IDENTIFICATION** |
| Company Name: |  |
| Address: |  |
| Telephone: |  |
| Email: |  |
| Federal ID#: |  |
| **Print Name** | **Title** | **Authorized Signature** | **Date** |
|  |  |  |  |

**Table of Contents**

**COVER PAGE ………….………….………………………………………………………………………………….2**

# [PURPOSE: REQUEST FOR QUALIFICATIONS (“RFQ”)](#_bookmark0) [4](#_bookmark0)

# CONTRACT PERIOD ………………………………………………………………………………………….4

#  [BACKGROUND](#_bookmark1): UNITED PLANNING ORGANIZATION (UPO) [4](#_bookmark1)

#  [QUALIFICATION REQUIREMENTS…………………………………………………………………………](#_bookmark4).4

#  COMPENSATION ………………………………………………………………………………………………5

# PROPOSAL REQUIREMENTS ………………………………………………………………………………..6

# General Requirements …………………………………………………………………………….…….. 6

# Special Requirements …………………………………………………………………………………….6

# VII. APPLICATION SECTIONS AND SCORING …………………………………………………………………7

# VIII.[EVALUATION CRITERIA](#_bookmark5) ……………………………………………………………………………..……….7

# IX. [GENERAL TERMS AND CONDITIONS](#_bookmark6)…………………………………………………………………….....[8](#_bookmark6)

#  APPENDICES . 13

* 1. **Vendor Identification**
	2. **Education Form**
	3. **Reference Form**
	4. **ACH Form**
1. **PURPOSE: REQUEST FOR PROPOSALS (“RFQ”)**

The purpose of this Request for Qualification (RFQ) is to invite applicants for proposal evaluation services from eligible professionals and firms to assist United Planning Organization (UPO) in reviewing proposals received in response to solicitations such as Requests for Proposals (RFQ) issued by United Planning Organization (UPO).

# CONTRACT PERIOD

Once selected as a qualified vendor, the term of any contract resulting from this RFQ shall be for a period not to exceed twelve (12) months from the date of execution. The contract may be extended for another two-year period or fraction thereof, depending on satisfactory performance and availability of funds.

# BACKGROUND: UNITED PLANNING ORGANIZATION (UPO)

UPO is a 501(c)(3) private non-profit corporation and the designated Community Action Agency for the District of Columbia (DC). UPO specializes providing economic security support services and human services to DC residents who have low includes, and also supports, and advocates to empower them to achieve economic security.

UPO promotes economic security by bringing innovative ideas to the problem of poverty throughout the city. UPO is governed by a board of 21 members, serves 50,000 customers annually, works with hundreds of partners and volunteers, and mobilizes a staff of 400 to operate a wide array of supportive and instructional services including:

* 1. Early Head Start and other childcare programs that make measurable differences in the education of our youngest and their families.
	2. Job placement and career development services
	3. Job and vocational training via the Workforce Institute
	4. Comprehensive youth services with scholarships for DC residents
	5. Homeless transportation services
	6. Training programs designed to prepare participants for skilled employment.
	7. Substance abuse treatment programs to treat and overcome addictions.
	8. Tax preparation and e-filing community-based tax preparation services
	9. Housing counseling services that help alleviate predatory lending, avoid foreclosures, and prepare customers for home ownership.
	10. Affordable housing partnerships, permanent supportive housing, and resident services

# QUALIFICATION REQUIREMENTS

Staff from the business firms or independent consultants responding to this RFQ must not be currently employed by UPO and should meet the following minimum requirements.

UPO will review each Proposal to determine which one, if any, is the most advantageous to fit its needs. Required qualifications for consultants are detailed below. Respondents must demonstrate competence and experience in one or more of the following:

* Job Placement and Employment Services
* Vocational Skills Training Services
* Education and Cognitive Development Services
* Income and Asset Building Services
* Housing and Homelessness Prevention Services
* Health and Social/Behavior Development services
* Youth Services
* Senior Services
* Information Technology Projects
* Business Consulting Services
* Management Consulting Services
* Real Estate Development and Management Services
* Communication Services
* Project Management Services
* Event Coordination and Management Services
* General Services

Knowledge of the Community Services Block Grant (CSBG) Program or Community Action is highly desirable but not required.

The role of qualified evaluators identified through this RFQ is to assist UPO in making informed decisions regarding which businesses, community-based organizations, vendors, and entities of other types best meet the requirements of solicitations issued.

# COMPENSATION

#  Qualified proposal reviewers/evaluators will be paid at a rate The rates paid require fully completed proposal evaluations for all proposals received and subsequent participation in a meeting of the evaluation panel for the solicitation. Attendance in person or virtual (on video) at the panels group meeting is requirement for full compensation. Failing to attend evaluation panel review meetings following proposal evaluation will result in the payment, specifically, a 50% loss per proposal reviewed. Contract awards range between $5,000 and $10,000 based on level of experience. The contract entitles the selected proposal reviewer to earn at the following rates for fully completed evaluations and required discussions:

# 1 to 50 Pages - $125

# 51 to100 Pages - $250

# For every additional 50 pages, an additional $125 is added to the rate paid for the proposal reviewed.

# If selected proposal evaluators earn the full amount of the contract before the 12-month period is over, additional funds will be added to the contract through an amendment and based on quality of performance as assessed by the Procurement Officer.

# PROPOSAL REQUIREMENTS

1. **General Requirements**
	1. In order to be considered for selection, proposers must submit a complete response to this RFQ electronically to **procurement@upo.org**referencing **“PROPOSAL EVALUATION SERVICES (RFQ#0040)** in the subject line. No other distribution of the proposals shall be made by the proposer.
	2. Proposal shall be signed by an authorized representative of the proposer. All information requested should be submitted. Failure to submit all information requested may result in the organization requiring prompt submission of missing information and/or given a lower evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by UPO.
	3. Proposals should be prepared simply, as thorough and detailed as possible, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFQ so that UPO may properly evaluate proposer's capabilities to provide the required services. Emphasis should be placed on completeness and clarity of content.
	4. Proposers shall respond to the items in the order they are shown in the RFQ.
	5. Ownership of all data, materials and documentation originated and prepared for this RFQ by any proposer shall belong exclusively to UPO.

# Special Requirements

All pages of the proposal should be numbered, and should be addressed in the proposal in the following order:

* 1. Completed and signed RFQ Cover Page.
	2. Completed and signed Vendor Identification Form (Appendix-A to the RFQ)
	3. Copy of current Business license(s) and certifications (if applicable)
	4. Copy of current Certificate of Liability Insurance (if applicable)
	5. Completed and signed Education Form (Appendix-B to the RFQ)
	6. Completed and signed Reference Form (Appendix-C to the RFQ)
	7. Completed and signed ACH Form (Appendix-D to the RFQ)
	8. W-9 Form
1. **APPLICATION SECTIONS AND SCORING**

An internal review panel will evaluate received applications to determine completeness of submission, level of interest, educational background, relevant experience and references.

|  |  |  |
| --- | --- | --- |
| **APPLICATION SECTIONS** | **REQUIRED DOCUMENT** | **POSSIBLE POINTS** |
| RFQ Cover Sheet | Completed and Signed RFQ Cover Page | 5 |
| Interest | Letter of Interest | 10 |
| Educational Background | Completed Education Form | 35 |
| Relevant Experience | Resume/Curriculum Vitae (CV) | 35 |
| Small, Minority or Women-Owned Businesses | Proof needed | 5 |
| References | Completed Reference Form(Full Name, Title, Relationship, Phone Number, Email) | 10 |
| **Total Scored Points** |  | **100** |

*There are a maximum of 100 points*. UPO reserves the right to accept or reject any proposals.

The letter of interest MUST list the subset of domains of expertise of the applicant. See domains of expertise sough in the section labelled minimum qualifications.

Applications are not required to have expertise in all domains listed above but must identify, in their letter of interest, the domains of expertise they wish to provide proposal evaluation services for. This level of detail will help to determine which proposals get assigned to qualified proposal evaluators who emerge successfully through this qualification process and receive an agreement from UPO. The resume or CV provided by applicants must be updated to the permit reviewers of applications received to assess expertise in the respective domains identified in the application.

# EVALUATION CRITERIA

Proposals will be evaluated on a variety of factors including the quality of the proposal and experience with similar programs.

The Proposer’s overall methodology and approach to successfully providing the Scope of Services will be evaluated. Proposals will be evaluated on, but not limited to the following:

* Ability to review and evaluate proposals received in response to RFPs, and RFQs
* Experience assessing using best practices and emerging trends for overall efficiency, operations, and management to evaluate proposals.
* Processes and/or measures for analysis and recommendations
* Experience assessing and offering recommendations on operation manuals and Standard Operating Procedures (SOP)
* Experience assessing and offering subsequent written comprehensive recommendations for evaluated entities.
1. All proposals will be reviewed to determine if they adhere to the format and instructions of the RFQ, meet the criteria indicated and conform to the objectives and requirements of the RFQ. An evaluation team will evaluate the merit of proposals received in accordance with criteria outlined in this RFQ. Incompleteness, significant inconsistencies, or inaccuracies found within a response may result in a reduction of the evaluation rating.
2. UPO reserves the right to: (a) reject any or all proposals, and (b) request clarifications from any or all proposers. Further, UPO reserves the right to reject any or all proposals and to waive informalities and minor irregularities and to accept any portion of a proposal or all items proposed if deemed to be in the best interest of UPO.
3. Proposals shall be rejected if they: (a) are received after closing date and time, (b) contain alterations not initialed by an authorized official, (c) are not meeting specifications, and (d) are not meeting the general terms and conditions.
4. UPO may request additional information or clarifications before making a final decision. UPO reserves the right to select the particular response which will best serve its business interests.
5. If a selection is made as a result of this RFQ, it shall be awarded to the

proposal that is considered most advantageous to UPO’s goals.

1. Proposals will be evaluated on the basis of following criteria:
	* Adherence to RFQ: The proposer adheres to the instructions in this RFQ on preparing and submitting the proposal.
	* Qualifications and experience: The proposer's past experience and performance on comparable engagements.
	* Reasonableness of cost: A total dollar amount for the service requested and the detailed breakdown provided with the proposal, if applicable.

# GENERAL TERMS AND CONDITIONS

1. Additions and/or Deletions of Service: UPO reserves the right to add and/or delete goods or services to any contract entered into with the contractor. Should a requirement be deleted, payment to the contractor shall be reduced proportionally to the amount of service reduced in accordance with the bid price. Should additional services be required from the contract, prices for such additions will be negotiated between the contractor and UPO. Any changes to any contracts will be made by the execution of a mutually agreed amendment.
2. Termination of Contract: The contract may be terminated by either party at any time upon sixty (60) days written notice from the terminating party. Cancellation of the contract by either party shall in no way relieve the contractor of its responsibility to complete any and all work in progress at the time of the notice and for which payment has been received by the contractor. Contractor shall be liable for any and all damages sustained by UPO as a result of contractor’s failure to complete such work in progress.
3. Licenses: By submitting a proposal, proposer certifies that it has procured, and shall maintain in full force, all permits, and licenses required to conduct its business lawfully and that it shall remain informed of and in compliance with all federal and local laws, ordinances and regulations that affect in any manner contractor’s fulfillment of the contract.
4. Anti-Kickback Provision: This contract is subject to the provisions of the Anti- Kickback Enforcement Act of 1986. By agreeing to this binding agreement, the transacting parties (1) certify that they have not paid kickbacks directly or indirectly to any employee of UPO for the purpose of obtaining this or any other agreement, purchase order or contract from UPO and (2) agree to cooperate fully with any Federal Agency investigating a possible violation of the Act.
5. Non-Collusion/Fraud: By submitting a proposal, proposer warrants and certifies that neither the proposer nor its employees or associates has contacted any unauthorized UPO employee, officer or elected official regarding the contents of this solicitation or the solicitation process. Proposer further warrants and certifies that neither proposer nor its employees or associates has directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in response to this solicitation. If at any time it shall be found that proposer or its employees or associates has, in the presenting of its proposal, colluded with any other party or parties for the purpose of preventing or restricting free competitive bidding, its proposal shall be immediately rejected. Any contract awarded prior to the UPO’s discovery of proposer’s collusion shall be terminated and proposer shall be liable for all of its damages sustained by the UPO as a result of proposer’s collusion.
6. Equal Opportunity: The proposer agrees not to discriminate against any employee or applicant for employment on account of any services, or activities made possible by or resulting from this RFQ on the grounds of actual or perceived sex, race, color, religion, national origin, age, marital status, disability, personal appearance, sexual orientation, gender identity or expression, familial status, family responsibilities, matriculation, political affiliation, genetic information, source of income, place of residence or business, veteran status or any other characteristic protected under federal or District law. Any violation of this provision shall be considered a violation of a material provision of this agreement and shall be grounds for cancellation, termination or suspension in whole or in part of the agreement by UPO which may result in ineligibility for further UPO contracts. The proposer shall at all times in the proposal and contract process comply with all applicable UPO, DC, and federal anti-discrimination laws, rules, regulations and requirements thereof.
7. Right to Audit: UPO shall have the right to audit all invoices submitted by the contractor. The organization shall have the right to audit all relevant data upon which the contractor’s fees are based.
8. Informal Communications: From the date of receipt of this RFQ by each contractor until a binding contractual agreement exists with the selected contractor and all other proposers have been notified, or when UPO rejects all proposals, informal communications regarding this procurement shall cease. There shall be no requests from proposers to any Office or Office at UPO with the exception of contact for information, comments, etc., and they shall be emailed.
9. Formal Communications: From the date of receipt of this RFQ by each proposer, until a binding contractual agreement exists with the selected contractor, and all other proposers have been notified, or when UPO rejects all proposals, all communications between UPO and the proposers will be formal emails.
10. Costs Incurred: Any costs incurred by proposers in preparing or submitting a proposal or subsequent oral presentation/demonstration shall be the proposer's sole responsibility.
11. Small or Minority or Women-Owned Enterprises: Pursuant to Federal Acquisition Regulations and UPO’s procurement policy, UPO may offer contracting opportunities to small and minority firms, women’s business enterprises and labor surplus area firms to the extent possible.
12. Federal, State and Local Taxes: UPO is exempt from State and federal taxes. Such taxes shall not be included in quoted prices, but if any taxes are known by the contractor to apply, they shall be shown separately. If not so shown, they shall be considered an expense of the proposer and deemed a part of the quoted prices.
13. Payment Terms: Preferred invoice payment terms will be 2% 10, net 45 days from date of invoice. ACH is the preferred method of payment by UPO, and the selected proposer (contractor) will be provided an ACH form to fill out prior to the execution of any contract. In the event there is a discrepancy between the order and the invoice, payment terms shall be effective starting on the date the discrepancy is resolved. Monies due or to become due to the contractor under the contract may be retained by UPO as necessary to satisfy any outstanding claim which UPO may have against the contractor. At any time or times before final payment and three years thereafter, UPO may have the contractor’s invoices or vouchers and statement of cost audited.
14. Indemnification: Proposer shall indemnify, protect, defend and hold harmless UPO, its directors, officers, employees, and representatives from and against any and all claims arising from or connected with: (1) any alleged or actual breach by proposer or (2) any act or omission by contractor and only to the extent such claim arises by negligence or intentional misconduct or as may be allowed under applicable law. Monies due or to become due to the contractor under the contract may be retained by UPO as necessary to satisfy any outstanding claim which UPO may have against the contractor.
15. Insurance: After a contract is issued, and if applicable, the contractor shall, at all times, at its own expense, obtain and carry comprehensive liability insurance including errors and omissions coverage, property damage insurance and workers’ compensation insurance in adequate amounts. Contractor shall keep such insurance in force for the duration and term of this agreement. All certificates of insurance or evidence of insurance must contain a thirty (30) day written notice of any cancellation, change, or termination of coverage. The insurance required shall be obtained from insurance company(ies) licensed to do business in the District of Columbia and shall be kept in force for 90 days after the last payment under the contract.
	* Workers’ Compensation Insurance providing statutory limits for the District of Columbia.
	* Business Automobile Liability Insurance with a minimum of

$1,000,000 per occurrence.

* + Commercial General Liability Insurance coverage with a minimum of

$1,000,000 per occurrence/$2,000,000 aggregate limit.

The contractor shall provide immediate notice in the event there is any change of insurance or that it has reached the insurance limits due to claims made.

1. RFQ Amendment: In the event that it becomes necessary to revise this RFQ, in whole or in part, an Amendment will be issued and posted on UPO website for information of all prospective proposers and that Amendment needs to be acknowledged in the proposal: [http://www.upo.org/work-with-us/#RFQ](http://www.upo.org/work-with-us/#rfp)
2. Completed Proposals: A proposer may submit no more than one (1) proposal in response to this RFQ. The proposal shall be completed and signed by an individual who is authorized to bind the firm submitting the proposal.
3. Withdrawal of Proposals: At any time prior to the hour and date set for submitting proposals, a proposer may withdraw the proposal. This will not preclude the submission of another proposal prior to the hour and date set for submitting the bid. After the scheduled time and date for submitting proposals, no proposer will be permitted to withdraw the bid unless the award is delayed for a period exceeding 60 days.
4. Receipt and Opening of Proposals: Proposers are responsible to assure their proposal is delivered to UPO by the scheduled date and time. Only those bids which are received in a timely fashion as set forth in this RFQ will receive consideration. Proposals received after the date and hour designated are automatically disqualified and will not be considered; late proposals will be dated, marked as received late, and placed unopened in the solicitation file. Proposers must pay particular attention to ensure the proposal is properly addressed. UPO is not responsible if the proposal does not reach the destination specified by the appointed date and time.
5. Qualification Notification: When the evaluation process of the proposals is completed, the selected proposer will be included in the pool of qualified proposal evaluators and will be formally notified by email. Other notifications will not be honored and should not be considered as a valid notification. **This notification is not, and should not be construed as, the formation of a contract, nor does it guarantee that UPO will enter into a contract with the qualified proposer.** A formal contract will be generated and supplied by UPO, at its sole discretion, after the qualification notification is delivered.
6. Certifications: Any agreement resulting from this RFQ shall be subject to but not limited to the following certifications:
7. Certification that it nor its principles are not debarred, suspended, proposed debarment, declared ineligible, or voluntarily excluded by any federal Office or agency from participation in this transaction by any Federal Office or agency in accordance with 45 CFR Part 76.
8. Certification Regarding Lobbying under Title 31, US Code, Section 1352.
9. Acknowledgement: By submitting a proposal, the proposer represents that:
	* The proposer has read and understands the RFQ and submits the response in accordance therewith.
	* The proposer possesses the capabilities, equipment, and personnel necessary to provide an efficient and successful service.
	* The proposer has all the required licenses and insurance.
10. Claims: No claim will be allowed for additional compensation or time for completion based on a lack of knowledge or lack of understanding of any part of the RFQ.

# APPENDICES

# A blank form with red text  Description automatically generatedAPPENDIX - A: Vendor Identification Form

**APPENDIX - B: EDUCATION FORM**

|  |  |
| --- | --- |
| Undergraduate College / University |  |
| City, State |  |
| Date of Graduation |  |
| Major |  |
| Degree Type |  |

|  |  |
| --- | --- |
| Graduate School |  |
| University |  |
| City, State |  |
| Date of Graduation |  |
| Major/Specialization |  |
| Degree Type |  |

|  |  |
| --- | --- |
| Other Graduate School |  |
| University |  |
| City, State |  |
| Date of Graduation |  |
| Major/Specialization |  |
| Degree Type |  |

**LICENSURES, CERTIFICATIONS AND OTHER CREDENTIALS**

Please indicate all current professional licenses and certifications you possess that relate to the position for which you are applying.

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**APPENDIX - C: REFERENCE FORM**

|  |
| --- |
| 1st Reference |
| Full Name |  |
| Title |  |
| Organization |  |
| Relationship |  |
| Phone Number(s) |  |
| Email Address |  |

|  |
| --- |
| 2nd Reference |
| Full Name |  |
| Title |  |
| Organization |  |
| Relationship |  |
| Phone Number(s) |  |
| Email Address |  |

|  |
| --- |
| 3rd Reference |
| Full Name |  |
| Title |  |
| Organization |  |
| Relationship |  |
| Phone Number(s) |  |
| Email Address |  |

# APPENDIX - D: ACH FORM

|  |
| --- |
| **1. Please Check One:** |
| NEW Direct Deposit CHANGE Direct Deposit CANCEL Direct Deposit |
| **2. Vendor/Payee Information** |
| **Name:** |
| **Address:** |
| **Contact Person’s Name (if other than payee):** |
| **Telephone Number:** |
| **Email Address:** |
| **3. Financial Institution Information** |
| **Bank Name:** |
| **Bank Address:** |
| **Name on Bank Account:** |
| **Bank Account Number:** |
| **Nine-Digit Bank Routing/Transit Number (ABA):** |
| **Type of Account: Checking Savings** |
| **4. Approvals/Authorizations -** I certify that the information provided on this form is correct, and I hereby authorize United Planning Organization Office of Accounts Payable to electronically deposit payments to the bank account designated above. It is my responsibility to notify UPO Finance Dept for issues with payment received or deposited, and any changes to bank account information at payments@upo.org or (202) 238‐4799). I understand that this authorization will remain in full force and effect until UPO Finance Dept received a written notification requesting a change or cancellation and has had reasonable opportunity to act on it, which should take no longer than seven (7) to ten (10) business days. |
| Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  |
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| --- |
|  |
| **Important Information** |
| Please return completed form via email: **payments@upo.org** |

|  |  |
| --- | --- |
| **Finance Department Use Only** | **Date Stamp - Received** |
| Reviewed and Approved By: Date: |  |

 |