



NEW HAVEN PUBLIC SCHOOLS

## Operations Memorandum

**To:** New Haven Board of Education Finance and Operations Committee  
**From:** Jamar Alleyne, Executive Director of Facilities Management  
**Date:** July 24, 2023  
**Re:** Purchase Order with Brightly Software to provide facilities department with work order management software.

**Answer all questions** and have a representative ready to present the details of each question during the Finance & Operations meeting or this proposal may not be advanced for consideration by the full Board of Education.

Company Information	
Vendor Name:	Brightly Software
Doing Business as: (DBA)	
Vendor Address:	11000 Regency Parkway Suite 400 Cary, NC 27518
Vendor Contact Name:	Brightly
Vendor Contact Email:	accountsreceivable@brightlysoftware.com
Is the contractor a minority or women owned small business?	No
Agreement/Contract Information	
New or Renewal Agreement/Contract?	Purchase Order
Effective Dates: (mm/dd/yy) <small>Multi-yrs. require Board of Aldermen approval</small>	From 07/01/2023 To 06/30/2024
Total Amount: <small>If Multi-yr. include yr. to yr. breakdown</small>	\$42,495.70
Funding Source Name: Acct. #:	2023-2024 Capital Projects 3C24-2461-58101
Contract #: <small>(Local or State)</small>	N/A



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**Key Questions:**

**1. What specific service will the contractor provide:**

FS Direct and Maintenance Essentials Pro.

**2. How was the contractor selected?** *\*Attach appropriate supporting documents*

- Quotes**
- Sealed Bid #**
- Sole Source #** \_\_\_\_\_
- RFP#** \_\_\_\_\_
- State Contract #** \_\_\_\_\_
- Exempt Professional**
  - Accountant
  - Actuary
  - Appraiser
  - Architect
  - Artist
  - Dentist
  - Engineer
  - Expert Professional Consultant
  - Land Surveyor
  - Lawyer
  - Physician/Medical Doctor

**3. If the vendor was selected through Solicitation (Bid/RFQ/RFP) process; answer the following:**

**a. Please explain how the vendor was chosen?** *\*Attach Vendor Proposal*

N/A

**b. Who were the members of the selection committee?** *(Minimum 3 members required)*

N/A



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**Key Questions: - Continued**

**4. If this is a renewal with a current vendor, has the vendor has met all obligations under the existing agreement/contract?**

The vendor provided the software for the facilities department for several years and have a large archive of our work order requests of the district for years..

**5. If this agreement/contract is a Renewal, has the cost increase? If yes, by how much? \*Attach Renewal Letters**

There is a 22% increase of the software an increase of \$7,901.48.

**6. If this new agreement/contract, has cost for service increased from previous years? If yes, by how much?**

N/A

**7. Is this a service that existing staff could provide? Why or why not?**

No this is a service that is provided by a reputable company that provides this service to the district.



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**Agreement/Contract Processing Checklist**

*To ensure timely processing of the submitted Agreement/Contract it is imperative to collect and provide all of the required documentation noted below and provide with submission to board.*

**Forms/Documents are available in: Drive G:\F&O Agenda Minutes\Agreement\_Contract\_Checklist\2022-2023**

<b>1. Has this vendor performed service(s) in prior fiscal years?</b>	
If Yes,	Vendor # 46013
If No or New,	Vendor must provide completed W9
<b>2. A quotes or proposal submitting regarding the agreement/contract.</b>	
If RFP	Attach Vendor Submitted
Other	Copy of State Contract, Quotes, etc.
<p><b>3. <u>Certificates of Liability Insurance (COI) are required for ALL agreements/contracts, read the following and select the applicable Rider.</u></b></p> <p><b>It is the submitters responsibility to request the COI from the vendor and attach with submission; the COI from the Vendor <u>must match rider specifications outlined.</u></b></p> <p><b>Failure to obtain or incorrect COIs will be returned for revision and will delay its processing.</b></p>	
Rider 300	Professional Services – Onsite Umbrella; w/ Auto; w/ Workers Compensation
Rider 305	Professional Services – Onsite Umbrella; No Auto; No Workers Compensation
Rider 310	Professional Services – Onsite Umbrella; w/ Auto; No Workers Compensation
Rider 315	Professional Services – Onsite Umbrella; w/ Youth under 21
Rider 320	Professional Services – Offsite; No Auto; No Workers Compensation
Rider 325	Professional Services – Offsite; No Auto; No Workers Compensation; w/ Youth under 21
Rider 330	Professional Services – Offsite Attorney; No Auto; No Workers Compensation
Rider 335	Professional Services – Onsite; Physician/Dentist; No Auto
Rider 340	Professional Services – Onsite Physician/Dentist w/ Youth under 21
Rider 345	Professional Services – Onsite Temp Nurses
Rider 350	Professional Services – Cyber – Onsite
Rider 355	Professional Services – Cyber – Offsite
<p><b>4. The City of New Haven requires the information requested in the <u>Disclosure Affidavit</u> before any City agency, department, or city official seeking agreement/contract shall obtain them, notarized.</b></p>	
Emailed Disclosures are acceptable.	



Invoice

Tax ID: 56-2174429
Phone: 877-639-3833
Email: accountsreceivable@brightlysoftware.com

Invoice #: INV-217546
Invoice Currency: USD
Invoice Date: 07/06/2023
Terms: Net 30
Due Date: 08/05/2023
Client ID: 1173991

Bill To:
New Haven Public Schools
Thomas Lamb
54 Meadows Street
New Haven, CT 06519
United States

Ship To:
New Haven Public Schools
Thomas Lamb
54 Meadows Street
New Haven, CT 06519
United States

Client PO #:

Reference:

Table with 6 columns: Description, Site, Start Date, End Date, Quantity, Amount. Rows include FSDirect and MaintenanceEssentials Pro.

Summary table with 2 columns: Description, Amount. Rows include SUBTOTAL, SALES TAX, and TOTAL.

Summary table with 2 columns: Description, Amount. Rows include TOTAL APPLIED and TOTAL DUE.

Tax exemption certifications can be sent to accountsreceivable@brightlysoftware.com.
Need a copy of our W-9? Click here to get a copy from our SharePoint site.
Need updated vendor information regarding our name change? Click here.

TO PAY BY CHECK
Brightly Software, Inc.
PO Box 360717
Pittsburgh, PA 15251-6717
OR 15250-6717

TO PAY BY ACH
HSBC Bank USA, N.A.
95 Washington St. 4 South
Buffalo, NY 14203
Account #: 879026464
Routing #: 022000020

TO PAY BY WIRE
HSBC Bank USA, N.A.
452 5th Ave.
New York, NY 10018
Account #: 879026464
Fed #: 021001088
Swift #: MRMDUS33

TO PAY BY CREDIT CARD
Call 877-639-3833
(3% surcharge applies)

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