RFP PROCESS CHECKLIST

Name of RFP: ______________________

Solicitation Type: RFP
RFP # ______________
Start Date ______________
End Date ______________

Contract Amount: ______________

Purchasing Level, BOE Required

Yes N/A	Date Completed	Action
		Present request for solitication to Board prior to contact expiration
		Request Board members to assist in RFP development and evaluation team
		RFP Development Form with all information pertaining to RFP
		Dept/Agency Information
		Budget
		Contract Terms & Amount, Signers
		Project Overview
		SOW/Specific Terms & Conditions/General Requirements-Penalties
		IT Information/TIN
		Evaluation Committee and Criteria
		Other (financials, references, resumes, Agency attachments, cost schedule, vendor presentations, BAA)
		RFP Development Form submitted to Purchasing
		RFP Release
		Proposal Opening
		Evaluation Period
		Evaluation Committee Meeting
		Vendor Presentations
		Letter of Intent
		Vendor Negotiations
		Present request for new contract to Board for approval
		Prepare Contract (Purchasing)
		Contract
		RFP/Amendments
		Insurance Requirements
		Contractor Proposal
		Other
		CETS Entry - Scan Attachments (if applicable)
		CETS Summary to Purchasing
		SOS Business License
		DAWN vendor detail
		Federal Debarred Vendor Listing
		Insurance (pertinent coverages/additional insured/waiver of subrogation)
		Receive Contract from Purchasing
		Route packet to Fiscal for CETS approval
		Route packet back to Purchasing
		Notice of Award (public post)
		Scheduled BOE Date
		BOE Agenda #
		Receive approved contract from Purchasing
		Scan executed CETS/contract to Shared Location
		Enter in Contract Payment Log - Link to Contract Summary Log
		Make contract binders

INFORMAL SOLICITATION PROCESS CHECKLIST

Name of Solicitation: ______________________________

Solicitation Type: ____________ Contract Amount: ______________

RFP # ____________

Start Date ____________ End Date ______________

Purchasing Level, BOE Required

Yes N/A	Date Completed	Action
		Present request for solitication to Board prior to contact expiration
		Solicitation Waiver Request to Purchasing
		Sole Source Request to Purchasing
		Informal Solicitation
		Complete Solicitation Form
		Contract Terms & Amount, Signers
		Project Overview
		SOW/Specific Terms & Conditions/General Requirements-Penalties
		IT Information/TIN
		Other (financials, references, resumes, Agency attachments, cost schedule, vendor presentations, BAA)
		Request Vendor Information from Purchasing
		Review Proposals (Quotes) once received
		Vendor Negotiations
		Present request for new contract to Board for approval
		Prepare Contract (Purchasing)
		Contract
		RFP/Amendments
		Insurance Requirements
		Contractor Proposal
		Other
		CETS Entry - Scan Attachments (if applicable)
		CETS Summary to Purchasing
		SOS Business License
		DAWN vendor detail
		Federal Debarred Vendor Listing
		Insurance (pertinent coverages/additional insured/waiver of subrogation)
		Receive Contract from Purchasing
		Route packet to Fiscal for CETS approval
		Route packet back to Purchasing
		Notice of Award (public post)
		Scheduled BOE Date
		BOE Agenda #
		Receive approved contract from Purchasing
		Scan executed CETS/contract to Shared Location
		Enter in Contract Payment Log - Link to Contract Summary Log
		Make contract binders

CONTRACT PROCESS CHECKLIST

Vendor: ______________________

Contract Type: Standard/Interlocal
CETS # __________
Amendment # __________
Start Date __________

Contract Amount __________
Amendment Amount __________
End Date __________

BOE	$50,000+	Yes / No
Clerk	$2,000-$49,999	Yes / No
Agency	$0-$1,999	Yes / No

Completed or N/A	**Action**
	Enter pending contract/amendment entry into Contract Log
	Board Approval
	Bid Solicitation (informal/formal/RFP)
	Sole Source Waiver
	Purchasing Extension Request
	Retroactive Memo Request
	TIN Request
	Budget Cost Proposal
	Payment Balance Log (for amendments)
	GFO $0 Justification Letter (amendment to extend) / BOE Justification Letter (original non BOE contract now BOE)
	SOS Business License
	DAWN vendor detail
	Federal Debarred Vendor Listing or OIG
	Insurance (pertinent coverages and additional insured)
	Prepare Contract (complete contract and attachments single sided)
	Prepare Attachments:
	SOW
	Cost Breakdown
	Insurance Reqt's
	BAA
	RFP or Bid
	Contractor Proposal
	Exhibits (amendments)
	CETS Entry - Scan Attachments if pertinent (see line items 16-23)
	Route via email to Vendor (1) copy
	Route packet via email to DAG (1) copy
	Route packet via email to Fiscal for CETS approval
	Contract Manager CETS approval
	Route physical packet to GFO (3) copies (keep final copies for PEBP)
	Scheduled BOE Date
	BOE Agenda #
	Receive approved contract from GFO
	Route via email approved contract to vendor
	Scan executed CETS/contract to Shared Location
	Notify staff
	Create or amend Contract Payment Log - Link to Contract Summary
	Make or update contract binder