**Solicitation Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **and No.:** 54000XXXXX

**CHECKLIST FOR EACH STAGE OF THE PROCUREMENT PROCESS**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **A - PLANNING STAGE**❒ **Approved Requisition Form / Shopping Cart /Solicitation Req Form** ❒ **IT Plan Approval** **Verification**❒ **Acquisition Planning**❒ **Market Research**❒ **Business Case****B - SOLICITATION STAGE****1 - Justifications (As Needed)**❒ **Brand Name/Make-Model**❒ **Competitive Sealed Proposal (RFP)** ❒ **Competitive Best Value Bid (BVB)** ❒ **Fixed Priced Bid (FPB)**❒ **Reverse Auction**❒ **Sole Source**❒ **Emergency**❒ **Pre-Qualification**❒ **Multi-term Contract & Approval by CPO**❒ **Trade-in Form****2 - Correspondence**❒ **Service Level Agreement**❒ **Agency Approval to issue the Solicitation** **❒ Management approval to publish****❒ SCBO Advertisement e-mail** | **B - SOLICITATION STAGE****3 – Public Meetings****❒ Pre bid or Proposal/Site Visit** **❒ Public Attendance Roster****❒ Minutes from Meetings/Visits****4 – Web Docs****❒ Request for Quotes-SP****❒ Pub Notice ITA wo Comp-SS&E****❒ Solicitation in Final Form****❒ Amendment(s) #\_\_\_\_\_\_\_****❒ Attachment(s) #\_\_\_\_\_\_\_****❒ Pre-Proposal or Pre-Bid Changes****❒ Questions and Answers****❒ Cancellation Notice****5 – Work in Process** ❒ **Agency Specifications** ❒ **Potential Vendor List****❒ Specifications & Draft****❒ Scope of Work & Draft****❒ Bid Criteria & Draft****❒ Draft Solicitation****❒ Draft Amendments****C - EVALUATION STAGE****1 - Vendor Response Log from Bid Room****2 - Correspondence****❒ CPO Approval to conduct Discussions-RFP** | **C - EVALUATION STAGE****3 - Solicitation Response(s)****❒ Quotes-SP****❒ Offers & Redacted Offers****❒ All Discussion (letters & responses)-RFP****❒ All Clarifications****❒ Withdrawal/Acceptance Ltrs** **❒ Bid Corrections****❒ RFQ Responses****❒ BAFO Requests and Responses****4 – Public Meetings RFP Process** **❒ Public Notice Panel Charge****❒ Blank Evaluator Report (Score Sheet)****❒ Procurement Integrity Representations and Restrictions****❒ Non-disclosure Agreement – Procurement Information****❒ Procurement Integrity Form****❒ Affidavit for Supervisors****5 - Responsibility Check****❒ References****❒ Financials (over $)****❒ DFWA Certification****❒ Secretary of State****❒ DNB Report (over $)****❒ Contract Reporting fees up to date (if applicable, Statewide Contracts)****❒ Cost /Pricing Analysis** **❒ SAM** **❒ Buy America** **❒ LLR**  | **C - EVALUATION STAGE****6 – Tab, Score, Summary Sheets****❒ Bid Tabulation****❒ Preference Calculations** **❒ Instructions to Panel** **❒ Public Notice Scoring Meeting****❒ Panel Member/Evaluator Score Sheets (including demo score sheets)****❒ Summary (Composite) of Evaluation Scores****❒ Responsibility Site Visit on vendor location****❒ Cost Calculations Utilizing Mathematical Formula****❒ Certificate of Insurance****❒ Bid Bonds** **7 - Negotiations****❒ Letter to enter into Negotiation****❒ Negotiated End User License Agreements/ Service Level Agreement** **❒ Signed Record of Negotiations** **8 – Determinations & Findings****❒ Determination and Findings Form****❒ Determination of Non-Responsibility****❒ Determination of Non-Responsiveness****❒ Determination of Award** | **D - AWARD STAGE****❒ Final Contract Docs****❒ Award Extensions (both)****❒ Supervisor’s Approval to Post Award** **❒ Award /Intent to Award****❒ Stay, Reinstatement, Cancellation of Award****E - PROTEST**❒ **Letter(s) of Protest (Solicitation or Award)****❒ Suspension Notice of Award****❒ CPO’s Letter of Hearing to Interested Parties** **❒ CPO’s Decision****❒ Protest Withdrawal Letter Motion to Dismiss (included with ruling?)****❒ Appeal of CPO decision****❒ Hearing Notice – Procurement Review Panel****❒ Panel Decision****❒ Appeal of Panel Decision****❒ Reinstatement Notice****❒ Cancellation of Award****F – FOIA REQESTS**❒ Request **Letter 1**❒ **Response 1**❒ Request **Letter 2**❒ **Response 2** |