**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** |