

INFORMAL SOLICITATION PROCESS CHECKLIST

Name of Solicitation: _____

Solicitation Type: _____
 RFP # _____
 Start Date _____

Contract Amount: _____
 End Date _____

Purchasing Level, BOE Required

Yes N/A	Date Completed	Action
		Present request for solicitation 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