



# CITY OF SANTA FE PROCUREMENT CHECKLIST

Contractor Name: \_\_\_\_\_

Procurement Title: \_\_\_\_\_

Solicitation RFP/RFB#: \_\_\_\_\_

Other Methods: State Price Agreement  *Cooperative*  *Sole Source*  *Exempt*  *Other*  \_\_\_\_\_

Department Requesting/Staff Member \_\_\_\_\_

**Procurement Requirements:**

*A procurement file shall be maintained for all contracts, regardless of the method of procurement. This file shall contain the basis on which the award is made: all submitted bids and proposals, all evaluation materials, score sheets, quotations and all other documentation related to or prepared in conjunction with evaluation, negotiation, and the award process. The procurement shall contain a written determination from the Requesting Department, signed by the Procurement Officer, setting forth the reasoning for the contract award decision before submitting to the Council Committees.*

	YES	N/A	
<b>AWARD</b>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Fully executed Memo to Committees from the Department with recommendation of award Winning proposal (this is a copy that has all confidential/proprietary information excluded) Screen print of Contract Award Notice Screen print of Award Notice published on agency website Email or notification sent to all Bidders/Offerors that award was made Waiver or "No Action Taken" from Procurement Office Correspondence with Procurement Office regarding waiver If IFB and not awarded to lowest responsive, responsible bidder; written explanation Other: _____
<b>SOLICITATION</b>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Project Beginning History (council requests etc.) Budget Determination (FIR) attach Solicitation document (RFP, IFB) Screen print of legal solicitation published in newspapers, web sites, etc. Screen print of addendum(s) published on the IPB/RFP: Pre-Bid/Pre-Offer Conference attendance sheet and other documents If canceled, screen print of cancellation of solicitation notice Other: _____
<b>DISCLOSURES</b>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<p><b>Contractor Disclosures &amp; Conflicts of Interest</b></p> Disclosures & Conflicts of Interest Form(s) (winning bidder(s)/offeror(s)) <p><b>Contractor –Conflicts of Interest</b></p> Purchasing Office Letter or e-mail to designated individual regarding potential conflict Conflict of Interest Form signed by all parties Letter from Procurement Office regarding the potential conflict <p><b>Subcontractor Disclosures</b></p> Disclosures & Conflicts of Interest form of Subcontractor(s) <p><b>Subcontractor –Conflicts of Interest</b></p> Purchasing Officer Letter or email to designated individual regarding potential conflict Conflict of Interest form signed by all parties Letter from Legal Office regarding the potential conflict Other: _____

	YES	N/A	
<b>CONTRACT</b>	<input type="checkbox"/>	<input type="checkbox"/>	Copy of Executed Contract
	<input type="checkbox"/>	<input type="checkbox"/>	Copy of all documentation presented to the Committees
	<input type="checkbox"/>	<input type="checkbox"/>	Finalized Council Committee Minutes
	<input type="checkbox"/>	<input type="checkbox"/>	Other: _____
<b>EVALUATION</b>	<input type="checkbox"/>	<input type="checkbox"/>	Blank evaluation form
	<input type="checkbox"/>	<input type="checkbox"/>	Evaluator's names and profiles
	<input type="checkbox"/>	<input type="checkbox"/>	Evaluation procedures or evaluation instructions
	<input type="checkbox"/>	<input type="checkbox"/>	Conflict/Confidentiality Forms signed by all Evaluators, Technical Advisors, Reviewers, and any person who assists in regard to the bid/proposal, evaluation and/or award
	<input type="checkbox"/>	<input type="checkbox"/>	Bid or Offer opening sheet(s) (If RFP, then two offer opening sheets, one for technical and one for cost)
	<input type="checkbox"/>	<input type="checkbox"/>	Screen print of Bidder/Offeror's detailed information
	<input type="checkbox"/>	<input type="checkbox"/>	Responsiveness review sheet or other sheet documenting responsiveness for each Bidder/Offeror, attach requests for additional information to cure items
	<input type="checkbox"/>	<input type="checkbox"/>	Non-Responsive/Non-Responsibility Form and correspondence or letters from Department to vendor regarding disqualifications
	<input type="checkbox"/>	<input type="checkbox"/>	Oral presentations (sign-in sheets, presentation materials, etc.)
	<input type="checkbox"/>	<input type="checkbox"/>	Documentation sent to Bidders/Offerors and responses received regarding clarifications, decisions, negotiations, and/or best and final offers, etc.
	<input type="checkbox"/>	<input type="checkbox"/>	Reference Reviews/Reference Check Questionnaires
	<input type="checkbox"/>	<input type="checkbox"/>	Individual evaluations included for each RFP.
	<input type="checkbox"/>	<input type="checkbox"/>	Pricing evaluation
	<input type="checkbox"/>	<input type="checkbox"/>	Final overall evaluation matrix or summary of evaluator scores
	<input type="checkbox"/>	<input type="checkbox"/>	Other: _____
<b>MISCELLANEOUS</b>	<input type="checkbox"/>	<input type="checkbox"/>	Local Preference Form
	<input type="checkbox"/>	<input type="checkbox"/>	New Mexico Residence Form
	<input type="checkbox"/>	<input type="checkbox"/>	Veterans Exemption
	<input type="checkbox"/>	<input type="checkbox"/>	<b>Sole Source determination form approved by Procurement Officer</b>
	<input type="checkbox"/>	<input type="checkbox"/>	<b>Exempt determination memo approved by Procurement Officer</b>
	<input type="checkbox"/>	<input type="checkbox"/>	Other: _____
			Include all other substantive documents and communication records pertaining to this procurement and any resulting contract.
<b>PROTEST (If applicable)</b>	<input type="checkbox"/>	<input type="checkbox"/>	Documentation from protester filed with the Purchasing Office
	<input type="checkbox"/>	<input type="checkbox"/>	Letter from Department to Purchasing Office Providing response to protest
	<input type="checkbox"/>	<input type="checkbox"/>	Letter from Purchasing Officer to protester and Department on final outcome
	<input type="checkbox"/>	<input type="checkbox"/>	Other: _____
			Create a separate file folder for documents with trade secrets, competitively sensitive, confidential or other proprietary information.
	<input type="checkbox"/>	<input type="checkbox"/>	Original bid(s) or proposal(s) with no redactions.
	<input type="checkbox"/>	<input type="checkbox"/>	Documentation exempt - Proprietary, Confidential, Competitively Sensitive, or Trade Secret (i.e. e-mails, proposals, letters)

\_\_\_\_\_  
Department Rep Printed Name and Title

\_\_\_\_\_  
Department Rep Signature attesting that all information included

\_\_\_\_\_  
Purchasing Officer attesting that all information is reviewed