



Procurement Checklist by Department

Responsibility of the procuring Agency

- Following the City's purchasing guidelines, policies and ordinances
- Contacting Purchasing for assistance in procurements
- Communicating project budget to Purchasing
- Developing specifications and adding them to the solicitation template
- Drafting a project calendar (project start, end, phases, etc.)
- Reviewing the draft solicitation document for correctness
- Providing criteria for evaluation and selecting evaluation panel members*
- Supplying responses to vendor's questions via Purchasing
- Ensuring attendance and participation of evaluation panel members*
- Reviewing, in their entirety, proposals, bids, quotes and qualifications received from vendors
- Completing evaluation materials* and reference checks
- Building consensus and selecting the lowest offer and/or best value from a qualified vendor
- Debriefings (i.e. explanation of award), if requested by vendors
- Writing and routing authorizing resolutions, if necessary
- Ensuring sufficient budget authority exists for the contract resulting from the solicitation
- Coordinating the contract process & involving key depts.(e.g. Purchasing, Attorney's, Civil Rights)
- Ensuring all Affirmative Action Plan requirements have been met
- Reviewing and, if not provided by the vendor, preparing the scope of work during contract drafting
- Being familiar with the resulting contract in its entirety
- Monitoring the resulting contract (e.g. correctness of pricing, timeliness, expiration)

Responsibility of Purchasing Department

- Determining the type of solicitation (i.e. Request for Bid, Proposal, Qualifications or Quote)
- Searching for existing cooperative contracts (e.g. State of WI, UW System, Dane County)
- Providing a template that includes standard terms & conditions and a sample contract
- Searching for examples of specifications, if requested by procuring department
- Developing a solicitation timeline (e.g. post, response to questions, due, evaluation, award)
- Finalizing the solicitation document(s) (e.g. proofing, converting to PDF)
- Posting the solicitation to the City's bid networks; VendorNet and DemandStar
- Acting as the sole point of contact for vendors (e.g. collecting questions, relaying answers)
- Distributing addendum
- Receiving delivery of the responses to the solicitation
- Checking each response contains the proper submittals (e.g. signatures, forms)
- Facilitating the evaluation process
- Reviewing, in their entirety, proposals, bids, quotes and qualifications received from vendors
- Ensuring attendance and participation of evaluation panel members*
- Reviewing and evaluating* sealed pricing and local vendor preference
- Ensuring the process conforms to purchasing guidelines, policies and ordinances
- Negotiating price and payment schedule
- Ensuring award is made to the lowest responsible offer and/or best value for RFQ, RFB, and top scoring vendor for RFP (P)
- Sending vendor summary and letters to vendors. Posting results.

* - Request for Proposals only