



Procurement Checklist

(P) – Responsibility of Purchasing Department, (D) – Responsibility of the procuring Department

- Following the City’s purchasing guidelines, policies and ordinances (D)
- Contacting Purchasing for assistance in procurements (D)
- Communicating project budget to Purchasing (D)
- Determining the type of solicitation (i.e. Request for Bid, Proposal, Qualifications or Quote) (P)
- Searching for existing cooperative contracts (e.g. State of WI, UW System, Dane County) (P)
- Providing a template that includes standard terms & conditions and a sample contract (P)
- Developing specifications and adding them to the solicitation template (D)
- Searching for examples of specifications, if requested by procuring department (P)
- Developing a solicitation timeline (e.g. post, response to questions, due, evaluation, award) (P)
- Drafting a project calendar (project start, end, phases, etc.) (D)
- Reviewing the draft solicitation document for correctness (D)
- Providing criteria for evaluation and selecting evaluation panel members* (D)
- Finalizing the solicitation document(s) (e.g. proofing, converting to PDF) (P)
- Posting the solicitation to the City’s bid networks; VendorNet and DemandStar (P)
- Acting as the sole point of contact for vendors (e.g. collecting questions, relaying answers) (P)
- Supplying responses to vendor’s questions via Purchasing (D)
- Distributing addendum (P)
- Receiving delivery of the responses to the solicitation (P)
- Checking each response contains the proper submittals (e.g. signatures, forms) (P)
- Facilitating the evaluation process (P)
- Ensuring attendance and participation of evaluation committee members* (D)
- Reviewing, in their entirety, proposals, bids, quotes and qualifications received from vendors (D)
- Completing evaluation materials* and reference checks (D)
- Reviewing and evaluating* sealed pricing and local vendor preference (P)
- Building consensus and selecting the lowest offer and/or best value from a qualified vendor (D)
- Authoring a recommendation report* (D)
- Ensuring the process conforms to purchasing guidelines, policies and ordinances (P)
- Negotiating price and payment schedule (P)
- Ensuring award is made to the lowest responsible offer and/or best value (P)
- Notifying incumbent vendors of awards, changes and expirations of contracts (D)
- Debriefings (i.e. explanation of award), if requested by vendors. (D)
- Writing and routing authorizing resolutions (D)
- Ensuring sufficient budget authority exists for the contract resulting from the solicitation (D)
- Coordinating the contract process & involving key depts.(e.g. Purchasing, Attorney’s, Civil Rights) (D)
- Reviewing and, if not provided by the vendor, preparing the scope of work during contracting (D)
- Being familiar with the resulting contract in its entirety (D)
- Monitoring the resulting contract (e.g. correctness of pricing, timeliness, expiration) (D)

* - Request for Proposals only



Procurement Checklist by Department

Responsibility of the procuring Department

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- Drafting a project calendar (project start, end, phases, etc.)
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- Providing criteria for evaluation and selecting evaluation panel members*
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Responsibility of Purchasing Department

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