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| **Appendix G:** |
| ***Solicitation Plan Checklist***  **Instructions:** The following checklist is to be used for the procurement of any commodities or services, including public works (construction) projects. The checklist provides critical information needed by Purchasing & Contract Administration to initiate the procurement process. The Project Manager must complete, sign and send this checklist to Purchasing & Contract Administration. In addition to the completed checklist, the following two items are required: |
| * *Purchase Requisition (PR)* with the estimated expenditure amount, departmental SAP releases, and account assignment; * *Specification or Scope of Services,* complete with plans, drawings, images, if applicable, *as* approved by the designated departmental representative. |
| ***Check / Fill-in all that applies to type of Solicitation:*** |
| 1. Type of Solicitation Requested: RFI RFP RFQ IFB COOP or Informal Bid (Refer to Purchasing Manual for Definitions of Solicitations types listed above) Is this Solicitation Public or Private (Ref. RFI # )  2. PR Number(s): \_\_\_\_\_\_\_\_\_\_\_3. Title of Project: CIP \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  4. Estimated Project Value (*required*): \_\_\_\_\_\_\_\_\_\_\_\_\_.  5. Brief Project Description: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  6. Project/WBS#: Work Order #  7. Project manager: \_\_\_\_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  8. Is the purchase exempt from the competitive solicitation process? Yes No  **If yes,** enter PAMC exemption code & skip to Question 12:  9. Request Bid/Proposal Due Date:  10. Is a Pre-Bid Conference to be schedule for this project? Yes No  **If yes,** is attendance mandatory or not mandatory?  Date: Time: Location:  11. Will Federal, State, or other Grant money be used to fund the project? Yes No  **If yes,** describe the funding source(s):  12. Is this a multi-year contract? Yes No  13. Bid security (certified or cashier’s check, or bond)? Yes No  *(If the project is over $25,000, bid security of at least 10 percent of the bid is required.)*  14. Payment and performance security? Yes No  *(If the project is over $25,000, a bond for the amount of the contract price is required.)*  15. Will vendor have contact with minor(s) during course of project? Yes No  **If yes,** vendor must be listed in the Department of Justice – *Eligible to Hire* list, and provide a current copy of a ‘negative’ TB Test.  16. Will Service Provider be an independent contractor? Yes No Live Scan  (Refer to *Appendix O* to determine if an independent contractor relationship can be met.)  17. Is this a Capital Improvement Program (CIP) project consultant service? Yes No  18. Will Prevailing Wages be paid? Yes: Regional or Federal No  *(Reference Purchasing FAQs for threshold limits on prevailing wage applicability.)*  19. Project time of completion: License required:  20. Are there any special safety standards? Yes No  **If yes,** describe:  21. Attach “bid ready” *(ready to solicit)* Scope of Work or Specifications:  22. If technology related, do the CTC (IT) security requirements apply? Yes No  **If yes,** which ones apply? IPP SaaS VISA  23. Has Specification / Scope been approved by department management? Yes No  24. Has Specification / Scope been approved by City Attorney’s Office? Yes No  25. Has CEQA/Planning review been completed? Yes No N/A  26. Has Specification / Scope been saved to shared project folder? Yes No  27. List members participating in the development of specifications/requirements (include all parties):   |  |  |  | | --- | --- | --- | |  |  |  | |  |  |  |   28. List members (emails) participating in the evaluation process (include all outside parties):   |  |  |  | | --- | --- | --- | |  |  |  | |  |  |  | |  |  |  |   29. Bidders list of at least three recommended sources copied from PB e-procurement System:   |  |  |  | | --- | --- | --- | | **Company name and address** | **Contact name and email** | **Phone Number** | |  |  |  | |  |  |  | |  |  |  | |  |  |  | |  |  |  | |  |  |  | |  |  |  | |
| **Evaluation Criteria:**  30. List evaluation factors and their respective weights:  Check one: Lowest Responsive Bid (RFQ/IFB) Best Scored Proposal (RFI/RFP)   |  |  |  | | --- | --- | --- | | **Proposal Criteria (RFP Only – ref. PAMC 2.30.410)** |  | **Possible Points** | | (1)   Quality of the proposal;     (2)   Quality, performance and effectiveness of the solution, goods and/or services to be provided by the contractor;     (3)   Contractor's experience, including the experience of staff to be assigned to the project, with engagements of similar scope and complexity;     (4)   Cost to the city;     (5)   Contractor's financial stability;     (6)   Contractor's ability to perform the contract within the time specified;     (7)   Contractor's prior record of performance with city or others;     (8)   Contractor's ability to provide future maintenance, repairs parts and/or services;     (9)   Contractor's compliance with applicable laws, regulations, policies (including city council policies), guidelines and orders governing prior or existing contracts performed by the contractor; and     (10)   Any other factor the city deems relevant as specified in the request for proposals. |  |  |   31. Evaluation methods (List evaluation steps):  32. Evaluated Finalist identified date: Oral Interviews date (*if applicable*):  Best & Final (*if applicable*): 5-day Notice of Award period: to  City Council Approval date (*if applicable*): Award of Contract date:  33. Attach Quotes for **Cooperative Purchases** or**Informal Bids** and Evaluation Summary:  **Prepared by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_,** Print Name **Phone:**  **Authorized Signature: ­­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Dept/Div:**  ***Assistant Director or Division Manager: I certify all information is accurate to the best of my knowledge.)*** |
| **Please park this completed checklist, the suggested vendor list, and the scope of services in your project folder at U:\Purchasing\_City Departments. If any of these requirements are incomplete, the procurement process cannot be initiated and the PR will be released back.** |
| **During the solicitation planning, Purchasing will provide support in the following areas:**   * Procurement strategy support, including determination of requirements & compliance; * Vendor sourcing, including cooperative purchasing alternatives; * Field questions from potential bidders/proposers; * Record minutes and attendance at Pre-Proposal Meetings; * Issuance of addenda; * Lead or assist with contract negotiations; * Provide strategic support to the Project Manager from contract execution to closeout. |
| **End of Checklist** |