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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? [x] 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 [ ] No13. 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 [ ] No18. 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 [ ] VISA23. Has Specification / Scope been approved by department management? [ ] Yes [ ] No24. Has Specification / Scope been approved by City Attorney’s Office? [ ] Yes [ ] No25. Has CEQA/Planning review been completed? [ ] Yes [ ] No [ ] N/A26. Has Specification / Scope been saved to shared project folder? [ ] Yes [ ] No27. List members participating in the development of specifications/requirements (include all parties):

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28. List members (emails) participating in the evaluation process (include all outside parties):

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29. Bidders list of at least three recommended sources copied from PB e-procurement System:

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| **Company name and address** | **Contact name and email**  |  **Phone Number** |
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| **Evaluation Criteria:**30. List evaluation factors and their respective weights: Check one: [ ] Lowest Responsive Bid (RFQ/IFB) [ ] Best Scored Proposal (RFI/RFP)

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| **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.
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| **End of Checklist** |