

CHECK OFF LIST FOR SOLICITATION FOLDER

SOLICITATION NO.: _____ TITLE: _____

SOLICITATION DUE DATE AND TIME: ____/____/____ @ ____:____ (Arizona Time)

ACCOUNT CODE _____ - _____ - _____ - _____ - _____ - _____

CONTRACT TYPE: ONE TIME OR ANNUAL OR MULTI-TERM (CIRCLE ONE)

INITIAL CONTRACT TERM (IF APPLICABLE): _____ THROUGH _____

TOP OF FILE

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Section A – CONTRACT FILE

- Price Escalation Documentation _____ (Dates of Approval)
- Renewal Letters _____ (Dates of Renewal)
- Purchase Order/s (Most Recent on Top)
- Insurance Certificates _____ (Date Rec'd)
- Contracts, Performance Bonds
- Correspondence RE: Contract (Dated Recent on Top)

- Award Letter(s) w/Offer and Acceptance Signed
- Notice of Award Letters to Unsuccessful Vendor(s)
- Successful Award Page from AZP
- Return of Bid Bond(s)-(Copies Retained)(R7-2-1111)
- Board/Director of Purchasing Approval
- Agenda Item for Award Including Executive Summary

Section B – EVALUATION OF OFFERS

- Written Determination for Mistakes in Bids (R7-2-1030)
- Written Determination of Non-Responsibility (R7-2-1075)
- Written Determination for Multiple Award (Items 7(a)(6) and 7(b)(10) of the USFR Compliance Questionnaire)
- Written Determination for Only 1 Offer Received (R7-2-1032 & R7-2-1045(C))
- Written Determination for Additional Discussions/Best & Final (R7-2-1048)
- Written Determination for Acceptable/Unacceptable Offer (R7-2-1046)

- Solicitation Talley/Tabulation and/or Evaluation Report(s)(R7-2-1031 & R7-2-1050)
- Reference Checks
- Best & Finals Received from Offerors (R7-2-1048)
- Best & Final Request Letter(s) (R7-2-1048)
- Discussions Letters (R7-2-1047)
- Letters to Vendor(s) Rejected for RFP Discussions/Unacceptable Offers (R2-7-1047)
- Confidential Information Letter(s) (R7-2-1005)
- Evaluation Committee Member Statements/Conflict of Interest/Resource Individual Statement

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Section C – RECEIPT OF OFFERS

- Late Offers Documentation (Acceptance and/or Rejection) (R7-2-1028 & R7-2-1044)
- Written Determination for Cancellation After Receipt of Offers/Before Award (R7-2-1074)
- Offer Opening Attendance/Talley Sheet on _____ (Date)
- Solicitation Responses: Awarded on top & alpha order for non-awarded (envelopes attached)
- No Bids (AZP Page and Hard Copies; Retaining Envelopes not Necessary)

Section D – ISSUANCE OF SOLICITATION

- Number of Addenda Issued: _____
- Notes, questions, comments from Pre-Solicitation Meeting
- Sign-In Sheet for Pre- Solicitation Meeting
- Master Copy of Original Solicitation
- Affidavit of Publication & Ad (R7-2-1022(B))
- Prospective Bidders List (R7-2-1022(A))
- AZP Vendor Notice of Solicitation Sent on _____ (Date)(Print Page from Website)

Section E – PRE-SOLICITATION

- Written Determination for Trade-In (R7-2-1131)
- Written Determination for Factors for APDM (R7-2-1116)
- Written Determination for Request for Proposal (R7-2-1041)
- Written Determination for Multi-Term Contracts (R7-2-1093)
- Written Determination for Brand Name or Equal (R7-2-1102)
- Written Determination for Brand Name Only (R7-2-1102)
- Written Determination for Qualified Products List (R7-2-1102)
- Written Determination for Bonding for Non-Construction Bids (R7-2-1078)
- Drafts, Notes, Spec's (Preliminary Solicitation Information)
- Correspondence with Requester (Dated Recent on Top)
- Finance Department Approval of Budget (Account Code(s)) if applicable
- Survey for Co-Op use
- Approval to Issue from Superintendent

Buyer Assistant

Date

Procurement Specialist Supervisor

Date