

PROCUREMENT DETAILS WORKSHEET

The completion of this worksheet will assist DGS Procurement Division's Buyers and Engineering staff with developing specifications, creating the solicitation and identifying agency specific needs for a successful procurement.

LTB #:	ACQUISITION DESCRIPTION
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REQUESTING AGENCY CONTACT INFORMATION (Please Print)

AGENCY PROCUREMENT CONTACT	NAME: _____ PHONE: _____ EMAIL: _____ SUPERVISOR: _____ PHONE: _____
AGENCY TECHNICAL CONTACT <small>(Subject Matter Expert, End User Etc.)</small>	NAME: _____ PHONE: _____ EMAIL: _____ SUPERVISOR: _____ PHONE: _____

- Agency Purchase (within agency's purchasing authority)
 DGS PD Purchase

***Attach requested documentation if not provided with the original LTB submission.
E-mail or Fax worksheet & attachments to the assigned DGS buyer.***

A. SUPPORTING DOCUMENTATION

If you did not forward with the original LTB package please submit within five business days to your assigned buyer.

- Current Supplier'(s) Price Quote (for all items/components that will be purchased)
- List of Authorized Dealers / Distributors (e-mail/letter from manufacturer)
- Mission Critical Certification (Signed by Agency Secretary or Department Director)
- Applicable waivers or prior approvals (PIA, OFAM, OSP, etc.)
- CSSI Exemption Justification (if purchasing outside of a CSSI state contract)
- Previous approved LTB (if applicable)

B. PREVIOUS PURCHASE HISTORY

1. Has this item been purchased before? Yes No
 If Yes, was item purchased by DGS? Yes Previous DGS Purchase Order #(s): _____
 No Please attach previous agency PO.

2. Previous approved LTB #: _____ Date approved: _____

C. DGS SB/DVBE OPTION POLICY (Administrative Order # 09-02, dated 12-31-09) - PD Purchase Only

*If DGS PD will be conducting the purchase for LTB under \$250k, DGS/PD **MUST** use SB/DVBE Option (or apply for SB/DVBE Waiver). In order to expedite the processing, please provide the information below.*

1. Did agency attempt to purchase using SB/DVBE Option? Yes No
 - a. If Yes, what was the result? Please attach all relevant documentation (supplier's contacted, e-mail, correspondence, etc.).
 - b. If NO, why not?:
 - c. If NO, provide at least two (2) SBs or two (2) DVBEs that can provide item **OR** documentation/market research conducted verifying there is not (2) SBs or DVBs that can provide item.

D. TECHNICAL REVIEW

Please be sure you have provided the following with your LTB or attach & return with this document:

1. Product specification sheet(s) or literature for requested items and any/all applicable components.
2. Product specification(s) or literature of similar products in the industry that were evaluated.

E. ADMINISTRATIVE INFORMATION

Please identify any of the applicable items below and submit any supporting documents with this document.

1. Delivery Information:

a. Identify when the supplier must complete delivery for this procurement.

- Number of Days After Receipt of Order (ARO): _____ OR
- On or Before Specified Date: _____ OR
- Other as Described: _____

b. Identify any special delivery requirements and describe below.

- Security Clearance Specific Delivery Hours Delivery Distribution List
 - Other than FOB Destination Floor Plans Site Preparations
 - Packaging Requirement Building Access Facilities Approval
 - Special Delivery Tools Other: _____
- (pallet jack, forklift, etc.)

Additional Details: _____

2. Funding:

a. Funded with Federal Funds/Bonds/Grants? Yes No
(If Grant Funds, please attach a copy of the Grant Agreement).

b. Funds Expire on: _____.

3. Does the requested item have any software requirements or need any type of software to operate? Yes No

F. AGENCY REQUESTED ATTACHMENTS

Please indicate if there are any specific agency documents requested to be attached to the solicitation. If not included with the original PE package, please attach and return with this worksheet.

- Agency Special Provisions Delivery Schedule Sample
- Options Worksheet Drawings Pallet Specification
- Warranty Agreement Questionnaire Other _____

G. AGENCY REQUESTED SPECIAL INSTRUCTIONS, EVALUATION CRITERIA AND/OR REQUESTED LANGUAGE

Please check any of the following that may apply or want to discuss with DGS buyer:

1. Payment / Finance:

- Trade In Financing Arrangements/G\$MART Progress Payments Milestone Payments

2. Bonds:

- Performance Bond Surety Bond

3. Evaluation Criteria / Bid Submittals:

- Samples Prior to Award Resumes/References
- Customer References Drawings/Diagrams with Bid

4. Special Instructions:

- Special Installation Requirements Service Requirements
- Federal Excise Tax Cert w/PO Additional Units (# _____ / _____% within _____ days)
- Other: _____

H. OTHER REQUESTED LANGUAGE OR PERTINENT INFORMATION:

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