

PROCUREMENT DETAILS WORKSHEET

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

PE/REQUISITION #:	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: _____

***Attach requested documentation if not provided with the original PE or FI\$Cal requisition submission.
E-mail or Fax worksheet & attachments to the assigned DGS buyer.***

A. SUPPORTING DOCUMENTATION

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

- CSSI Exemption Justification (if purchasing outside of a Statewide Contract)
- Applicable waivers or prior approvals (PIA, OFAM, OSP, DVBE Program Requirement and DVBE Incentive etc.)
- Supplier/Manufacturer Quote(s)

B. PURCHASE HISTORY

1. Has this item been purchased before?: Yes No

 If Yes, was item purchased by DGS?: Yes Previous DGS Purchase Order #: _____
 (Please attach DGS/agency prior PO) No Previous Agency Purchase Order #: _____

C. SB/DVBE OPTION

If estimated purchase price is under \$250k, please provide the information below.

1. Did agency attempt to purchase using SB/DVBE Option and obtained quotes that met need? Yes No
 - a. If Yes, please conduct the purchase under your agency/department purchasing authority.
 - b. If No, why not?:
 - c. If No, provide documentation/market research conducted verifying there is not two (2) SBs or two (2) DVBEs that can provide item.

D. TECHNICAL REVIEW (For Competitive Specification Development)

Please be sure you have provided the following with your PE or FI\$Cal requisition or attach & return with this document:

1. Specification requirements identifying **mandatory** features/functions the commodity must have to meet agency business need(s) and **requested** specification features/functions that the agency may prefer but are not mandatory.
2. Identify a minimum of two (2) acceptable manufacturer brand/models found that can meet the business need:
 - a. _____
 - b. _____
3. A copy of the previous specification (if applicable).
4. Additional information (i.e., site-inspection, pre-inspections at vendor's location, inspection/acceptance testing, supplier demonstration, performance requirements, etc.):

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.

- | | | |
|--|--|---|
| <input type="checkbox"/> Security Clearance | <input type="checkbox"/> Specific Delivery Hours | <input type="checkbox"/> Delivery Distribution List |
| <input type="checkbox"/> Other than FOB Destination | <input type="checkbox"/> Floor Plans | <input type="checkbox"/> Site Preparations |
| <input type="checkbox"/> Packaging Requirement | <input type="checkbox"/> Building Access | <input type="checkbox"/> Facilities Approval |
| <input type="checkbox"/> Special Delivery Tools
(pallet jack, forklift, etc.) | <input type="checkbox"/> Other: _____ | |

Additional Details: _____

2. Funding:

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

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.

- | | | |
|--|--|---|
| <input type="checkbox"/> Agency Special Provisions | <input type="checkbox"/> Delivery Schedule | <input type="checkbox"/> Samples |
| <input type="checkbox"/> Options Worksheet | <input type="checkbox"/> Drawings | <input type="checkbox"/> Pallet Specification |
| <input type="checkbox"/> Warranty Agreement | <input type="checkbox"/> Questionnaire | <input type="checkbox"/> 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/GS\$Mart
- Progress Payments
- Milestone Payments

2. Bonds:

- Performance Bond (to ensure project is completed according to specifications)

3. Evaluation Criteria / Bid Submittals:

- | | | |
|---|---|---|
| <input type="checkbox"/> Samples Prior to Award | <input type="checkbox"/> Resumes/References | <input type="checkbox"/> Acceptance Testing |
| <input type="checkbox"/> Customer References | <input type="checkbox"/> Vendor Experience (# of years _____) | |
| <input type="checkbox"/> Drawings/Diagrams with Bid | <input type="checkbox"/> Other: _____ | |

4. Special Instructions:

- | | |
|--|--|
| <input type="checkbox"/> Special Installation Requirements | <input type="checkbox"/> Service Requirements |
| <input type="checkbox"/> Federal Excise Tax Cert w/PO | <input type="checkbox"/> Alternative Protest Process (APP) |
| <input type="checkbox"/> Manufacturer Warranty | <input type="checkbox"/> Extended Warranty |
| <input type="checkbox"/> Pre-Bid Conference/Site Inspection | |
| <input type="checkbox"/> Option to Purchase Additional Units at Bid Price (# _____ / _____% within _____ days) | |
| <input type="checkbox"/> Other : _____ | |

H. OTHER REQUESTED LANGUAGE OR PERTINENT INFORMATION:

