

**WRITTEN RECORD OF PROCUREMENT HISTORY
CHECKLIST
(TO BE USED FOR ALL PROCUREMENT)
Retain this form in your procurement file**

Your procurement file is your “diary” explaining how you procured an item/service and the rationale for all decisions. In addition to the items below, it should retain any supporting documentation, including notes or explanations regarding determinations or decisions made.

Micro-Purchase

- Evidence of availability of funds (signed project authorization)
- Required internal approvals for award (signed project authorization)
- Davis Bacon federal contract clause, if applicable*
- Fair and Reasonable Price Determination, including supporting documentation (copies of ads, quotes, etc.)

Small Purchase

- Written purchase request or other pre-solicitation documents
- Evidence of availability of funds (signed project authorization)
- Required internal approvals for award (signed project authorization)
- Method of Procurement Decision Matrix
- Solicitation, including specifications. The solicitation must include a clear and accurate description of the recipient's technical requirements. If applicable, evidence of publication (copy of published ad, website screenshot, etc.)
- If under \$100,000, Certification Of Compliance With Federal Contract Clauses if applicable, including applicable clauses*
- If \$100,000 or greater, third-party contract including applicable Federal contract clauses*
- Independent Cost Estimate, including supporting documentation (copies of ads, price lists, prior purchase orders, etc.)
- Quotations
- Fewer Than Three Offers Received Evaluation, if applicable. Include copies of any written communication.
- Price Analysis or Cost Analysis, including supporting documentation

Invitation for Bid (IFB)

- Evidence of availability of funds (signed project authorization)
- Required internal approvals for award (signed project authorization)
- Method of Procurement Decision Matrix
- Work scope/specifications. The solicitation must include a clear and accurate description of the recipient's technical requirements
- Invitation for bid, which includes date and time bid will be publicly opened
- Independent Cost Estimate, including supporting documentation (copies of ads, price lists, prior purchase orders, etc.)
- Advertisement and Solicitation, including evidence of publication
- Notice from MDOT: IFB approved/proceed with Bid
- Fewer Than Three Offers Received Evaluation, if applicable. Include copies of any written communication
- Price Analysis or Cost Analysis, including supporting documentation
- Responsibility Determination, including supporting documentation
- Bid Opening
- Third-party contract including applicable Federal clauses*, if the award is more than \$100,000
- Notice of award
- Notice to unsuccessful bidders and record of any debriefing
- Record of any protest
- Bid, Performance, Payment or other bond documents, if applicable
- Required insurance documents, if applicable
- Notice to proceed

Request for Proposals (RFP)

- Evidence of availability of funds (signed project authorization)
- Required internal approvals for award (signed project authorization)
- Method of Procurement Decision Matrix
- Work scope/specifications. The solicitation must include a clear and accurate description of the recipient's technical requirements
- Request for proposal, including evaluation criteria listed in order of importance
- Independent Cost Estimate, including supporting documentation (copies of ads, price lists, prior purchase orders, etc.)
- Advertisement and Solicitation, including evidence of publication
- Notice from MDOT: RFP approved/proceed with solicitation
- Fewer Than Three Offers Received Evaluation, if applicable. Include copies of any written communication
- Price Analysis or Cost Analysis, including supporting documentation
- Responsibility Determination, including supporting documentation

- Proposal Tabulation, including supporting documentation
- Third-party contract including applicable Federal contract clauses*, if the award is more than \$100,000
- Notice of award
- Notice to unsuccessful bidders and record of any debriefing
- Record of any protest
- Bid, Performance, Payment or other bond documents, if applicable
- Required insurance documents, if applicable
- Notice to proceed

State Extended Contracts for Buses (Bid by MDOT)

- Evidence of availability of funds (signed project authorization)
- Required internal approvals for award (signed project authorization)
- Method of Procurement Decision Matrix
- Verify project authorization Item description is for the correct type of revenue vehicle and chassis length
- If Local Purchase was specified in annual application, request authorization to change to MDOT OPT's purchase from your project manager
- Price Analysis for State Extended Purchases
- Review current Guidelines for State Extended Purchasing Program (vehicles) Checklist for Purchase available on MDOT OPT's website
- Place order and proceed following the Guidelines for State Extended Purchasing Program (vehicles)
- For vehicle purchases, ensure the Vehicle Purchase Specification Certification is completed

*If it is a construction project over \$2,000, copies of certified payrolls should be reviewed and obtained in compliance with the Davis - Bacon Act.

| SIGNATURE | TITLE | DATE |
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