

## 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)
- If Davis-Bacon applies,\* Certification of Compliance With Federal Contract Clauses and federal contract clauses
- Construction Less Than \$150,000
- Fair and Reasonable Price Determination, including supporting documentation

### Small Purchase

- Evidence of availability of funds (signed project authorization)
- Required internal approvals for award (signed project authorization)
- Method of Procurement Decision Matrix
- Solicitation, including specifications that are a clear and accurate description of the technical requirements
- 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\*
- If \$100,000 or greater, Independent Cost Estimate, including supporting documentation
- Quotations
- Fewer Than Three Offers Received Evaluation, if applicable. Include copies of any written communication
- If \$50,000 or greater, 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 that are a clear and accurate description of the technical requirements
- Invitation for bid, which includes the date and time the bid will be publicly opened
- If \$100,000 or greater, Independent Cost Estimate, including supporting documentation
- 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
- If \$50,000 or greater, Price Analysis or Cost Analysis, including supporting documentation
- Responsibility Determination, including supporting documentation
- Bid Opening
- 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

### 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 that are a clear and accurate description of the technical requirements
- Request for proposal, including evaluation criteria listed in order of importance
- If \$100,000 or greater, Independent Cost Estimate, including supporting documentation
- 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
- If \$50,000 or greater, 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 \$250,000 or greater, Independent Cost Estimate, including supporting documentation
- If Local Purchase was specified in annual application, request authorization to change to MDOT Office of Passenger Transportation's (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 weekly, certified payrolls should be reviewed and obtained in compliance with the Davis-Bacon Act.

SIGNATURE	TITLE	DATE