

Procurement Process Update

Presented by:

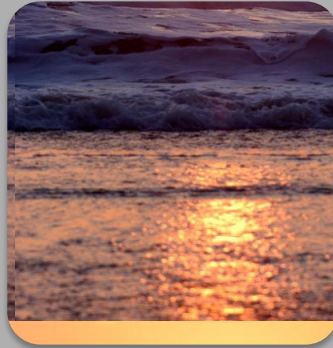
Jana Vargas

Director, Procurement

February 21, 2012



Procurement Documentation



Pre-
Solicitation

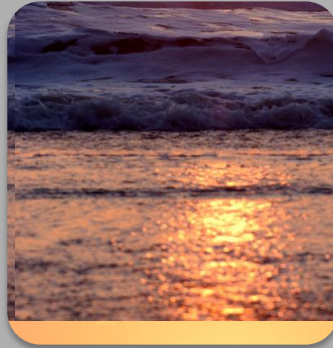
Solicitation

Evaluation

Additional
Documents

Agreement
Execution

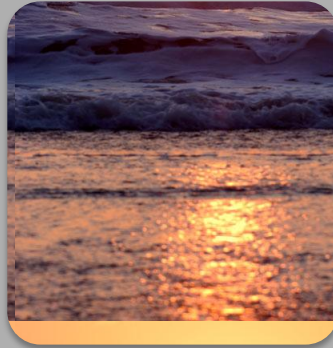
Procurement Documentation



Pre-Solicitation Documentation:

- Solicitation Checklist
- Proof of Advertisement (if applicable)
- Exhibit C (insurance/risk) Approval
- Contract Owner Approvals
- Small Business Preference Confirmations (CO & SBD as applicable)

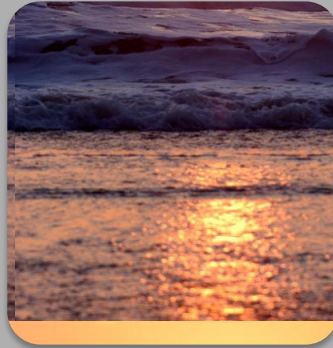
Procurement Documentation



Solicitation Documentation *(discard working solicitation files prior to publication):*

- Published Request for Proposal/Request for Qualification/Request for Bid (non-public works construction)
- Published Addendums
- Published Question & Answer Documents (if applicable)
- Sign-in Sheet for Pre-Solicitation Meeting (if applicable)
- Emails/Questions from Vendors

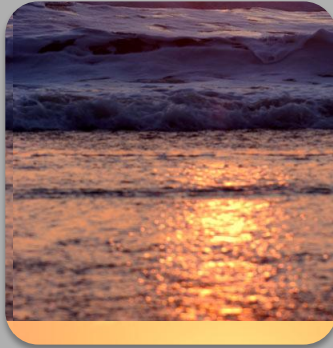
Procurement Documentation



Evaluation Documentation:

- Non-Conflict of Interest Forms (if applicable)
- Confirmation of Approved Panel Members (if applicable)
- Vendor Submissions
- Interview Letters (if applicable)
- Interview Questions/Agenda (if applicable)
- Individual Panel Evaluation Score Sheets (not applicable to bids)
- Summary Evaluation Matrices

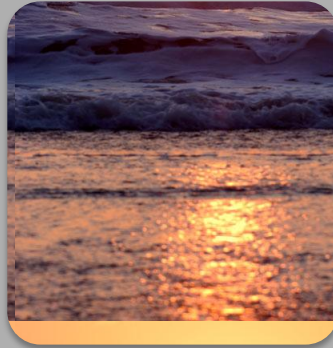
Procurement Documentation



Additional Documents:

- Outreach Report
- Protest/Appeal Letters
- Protest/Appeal Responses
- Background/Summary Memorandum
- Recommend/Non-Recommend Letters
- Record of Negotiations (if applicable)

Procurement Documentation



Agreement Execution Documentation *(discard working draft agreement files prior to approval/s):*

- General Counsel Agreement Checklist
- Approval-to-Form Email from General Counsel (prior to sending a contract to the Vendor for signature)
- Contract Owner approval/s
- Contract Execution Calendar (if applicable)
- Board Resolution (if applicable)
- Procurement Routing Slip
- Final Transmittal Memo
- Cover Memo for Options, Amendments, etc.
- Option Letter/s (if applicable)
- Proof of Non-Debarment (EPLS)
- Risk - Tenant Tracking Form