

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.

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 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 (5) business days to your assigned buyer.

- Current Year Expenditure Reduction Certification** signed by the Agency's Secretary or Department Director, or designees as referenced in BL 20-30 dated 8/10/2020, that extends BL 20-11 certification requirements to FY 20/21 (Electronic Signatures are encouraged)
- CSSI Exemption Justification (if purchasing outside a CSSI state contract)
- Applicable waivers or prior approvals (PIA, OFAM, OSP, etc.)

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.***

C. DGS SB/DVBE OPTION (if purchase price is under \$250k)

1. Did agency attempt to purchase using SB/DVBE Option? Yes No
 a. If Yes, what was the result? Please attach all relevant documentation (suppliers contacted, e-mail correspondence, etc.).

D. TECHNICAL REVIEW (For Competitive Specification Development)

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

1. Specification requirements identifying **mandatory** features/functions the commodity must have to meet agency business need 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., 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
- Surety Bond

3. Evaluation Criteria / Bid Submittals:

- | | |
|---|---|
| <input type="checkbox"/> Samples Prior to Award | <input type="checkbox"/> Resumes/References |
| <input type="checkbox"/> Customer References | <input type="checkbox"/> Drawings/Diagrams with Bid |

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"/> Pre-Bid Conference/Site Inspection | <input type="checkbox"/> Additional Units (# _____ / _____% within _____ days) |
| <input type="checkbox"/> Other : _____ | |

H. OTHER REQUESTED LANGUAGE OR PERTINENT INFORMATION:

