**STATE PROCUREMENT PRE-REVIEW CHECKLIST**

**OF COUNTY APD**

**-- EQUIPMENT / SERVICES / SOFTWARE CONSIDERATIONS --**

* EDP/ADP Equipment
* EDP/ADP Services (Services for planning, designing, operating State/County EDP system)
* Software

* State approval only
* Federal approval required

Prior Approval

* Purchase date/contract start date in future
* Leveraged Procurement (work/purchase order date in future)
* Contract Amendment (effective at a future date)

Software Issues

* Functionality does not affect integrity of a current system
* CWS: Functionality not duplicative/system-related
* Application software not developed especially for the public assistance programs

Equipment Issues

* Generic specifications
* Meet minimum specs
* CWS: Over specs includes explanation

Contract Amendment Issues

* Base contract previously approved (if subject to federal approval)
* Base contract competitively procured
* Base contract free of local preference

**STATE PROCUREMENT PRE-REVIEW CHECKLIST**

**OF COUNTY APD**

**-- REQUIRED DOCUMENTS --**

Required Documents: Competitive Procurement

* Draft solicitation document (RFP, IFB, ITB, RFQ, etc) or Federal Acquisition Checklist
* Draft SOW / Equipment specifications
* Draft contract

Required Documents: Leveraged Procurement

* Original solicitation document (RFP, IFB, ITB, RFQ, etc) or Previous Approval
* Current contract (ensure date still valid) or Previous Approval
* Draft SOW / Equipment specifications
* Draft work/purchase order

Required Documents: Sole Source Procurement

* County policy related to sole source purchases
* Draft SOW / Equipment specifications
* Draft contract
* Quote
* Cost/Price Analysis (or in APD)

Required Documents: Small/Informal Procurement

* County policy related to small/informal purchases
* Draft solicitation document, if applicable
* Draft SOW / Equipment specifications, if applicable
* Draft contract/purchase order
* 3 Quotes (Separate or in APD)

Required Documents: Contract Amendment

* Base Contract or Prior Approval
* Draft amendment

**STATE PROCUREMENT PRE-REVIEW CHECKLIST**

**OF COUNTY APD**

**-- REQUIRED CONTENT --**

APD Content: Procurement Section in General

* Describes individual purchase methodology in sufficient detail
* Publicly advertised
* No restrictions on participants/bidders
* Addresses local preference
* Addresses Audit/Retention clause

APD Content: Sole Source Procurement

* Specific reference to county policy related to sole source purchases
* Justification/business case
* Cost/Price Analysis (or in Separate Document)

APD Content: Small/Informal Procurement

* Specific reference to county policy related to small/informal purchases
* Reference to 3 Quotes

Content of Solicitation Document/Statement of Work:

* No unreasonable requirements on firms in order to qualify to bid
* No requirement of unnecessary experience of firms or team members
* No name brand or specific manufacturers unless accompanied by “or equivalent”
* No local preference
* Reasonable evaluation criteria/process

Contract Content:

* Audit/Record Retention
* Bonding requirements reasonable
* Breach of contract remedies
* Copyright: County ownership of any work subject to copyright/Federal License
* Custom Code/Software: County Ownership/Federal License
* Debarment & suspension
* Equipment disposal (to be determined)
* Liability provisions are not excessive
* Local preference, absence of
* Termination for cause
* Termination for convenience