

# BAKER DONELSON

## Procurement File Checklist

Disaster Declaration No. and Date Declared: \_\_\_\_\_

Project Worksheet (PW) No. and General Scope: \_\_\_\_\_

Contractor Name, Contract No., and Anticipated General Scope of Work: \_\_\_\_\_

Assigned Contract Manager or other designee: \_\_\_\_\_

Contractor Designated Representative name and contact information: \_\_\_\_\_

### **The Procurement File must include the following (at a minimum):**

- Copy of EMMIE Project Worksheet Report, or equivalent, for PW covering work covered by Contract.
- Rationale for determining the need for the services/work covered.
- Copy of pre-award independent cost estimate and description of how calculated. Amount \$ \_\_\_\_\_.
- Rationale for the method of procurement selected, i.e. micro-purchases, small purchase procedures, sealed bids, competitive proposals, or noncompetitive proposals. If micro- or small purchase, include documentation of estimated contract amount. If small purchase, include copies of other quotes received.
- If non-competitive proposal procurement, include documentation of exception supporting use.
- Copy of RFP/RFQ and any Amendments, Questions and Answers. Include copies of all publications/advertisements.
- Documentation of solicitation of small and minority businesses, women's business enterprises, and labor surplus area firms. Include documentation of any contact made to organizations assisting such firms. Include a list of certified vendors and documentation of how each was sent a copy of solicitation.
- List of all bidders who responded to solicitation including proposed pricing. For pre-event procurements, also include list of accepted, pre-qualified bidders and pricing.
- Documentation evidencing appointment of selection committee or description of how Contractor was selected.
- Basis for selection of Contractor to include all grading sheets regarding selection, evidencing bidder evaluations, and including reasons for rejection of any bid.
- Support for selection of Contract type, i.e. lump sum, unit price, cost reimbursement, time and materials/equipment.
- Documentation of cost or price analysis, including pre-award estimate, bid sheets, and any independent research on cost or price. Possible cost sources: RS Means, online quotes, national retailers, prior contract pricing, FEMA cost curve amounts and equipment cost codes, GSA schedules, other vendor quotes, FEMA's PW estimate if available.
- If Contract is time and materials/equipment, include a completed Determination of Suitability and supporting documentation. Ceiling Price \$ \_\_\_\_\_.
- Determination of Contractor responsibility.
- Documentation confirming good standing of Contractor including copy of search via [www.sam.gov](http://www.sam.gov). Include printout of search results.
- Copy of Contract including any pricing, Proposal Forms, Bid Sheets, etc.
- Copies of any subsequent Change Orders, Amendments, etc., including consideration factors for approval.
- Copies of any Bonds required.
- Documentation regarding any conflict of interest issues that arise and description of how handled.
- Documentation of any issues with Contractor, performance, completion, etc. and how handled.
- Copies of all invoices including supporting documentation.
- Copies of all payments made to Contractor including cancelled checks or proof of electronic transfer.
- Copies of all correspondence with Contractor regarding work issues, scope, costs.
- Copies of any correspondence with FEMA re scope of work, Contract, pricing estimate, eligibility, etc.