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| **Procurement Recordkeeping Checklist**  Instructions: Agencies will use this form or its agency equivalent to ensure records are complete in accordance with PRO-105, Procurement Record Retention and Access. | | | | | | |
| **Check** | **Record** | **Best Judgment** | **Simplified Bid** | **Request for Bid (RFB)** | **Request for Proposal (RFP)** | **Request for Information (RFI)** |
|  | Name of individual(s) responsible for transaction | x | x | x | x | x |
|  | Original solicitation document (regardless of form) |  | x | x | x | x |
|  | Copy of all addendum, amendments |  | x | x | x | x |
|  | Vendor questions, answers, and clarifications made | x | x | x | x | x |
|  | Copy of all attachments to a solicitation |  | x | x | x | x |
|  | Copy of notice published to advertise solicitation |  |  | x | x |  |
|  | List of bidders with small, veteran-owned, disabled veteran-owned, minority businesses and work centers identified |  | x | x | x |  |
|  | Justification for use of any bond or surety |  |  | x | x |  |
|  | Abstract of bids received |  |  | x |  |  |
|  | Abstract summary of all evaluator scores for responsive proposals |  |  |  | x |  |
|  | Simplified Bidding Record DOA-3088 (or functional equivalent) |  | x |  |  |  |
|  | Original bids/proposals submitted with evidence of timely receipt (e.g. date/time stamp) |  | x | x | x |  |
|  | Written correspondence with bidders/proposers |  | x | x | x |  |
|  | RFI responses submitted |  |  |  |  | x |
|  | Unopened late bids/proposals or listing of any late submissions returned to the bidder/proposer |  | x | x | x |  |
|  | Reason for rejection of any bids, including justification for any low bids rejected |  | x | x |  |  |
|  | Reason for rejection of any proposals, including justification for any high scoring proposals rejected |  |  |  | x |  |
|  | Where minimum 3 bids not received, documentation of effort to generate competition |  | x | x |  |  |
|  | In the case of tied bids, basis for award |  | x | x |  |  |
|  | Indication of name(s) of successful bidder(s)/proposer(s) |  | x | x | x |  |
|  | Receipts and details to support purchase | x |  |  |  |  |
|  | A statement of the application of life cycle costing options, reciprocity, supplier diversity preference and “Buy American” preference, where pertinent |  | x | x | x |  |
|  | Copy of notice of intent to award (services) or notice of award (commodities) |  |  | x | x |  |
|  | Any complaints, protests or appeals filed |  | x | x | x |  |
|  | Contract |  |  | x | x |  |
|  | Other pertinent records as dictated by the transaction | x | x | x | x | x |
|  | Best and final offer documents, if applicable |  |  |  | x |  |
|  | Signed copies of evaluation committee ethical guidelines forms DOA-3780 |  |  |  | x |  |
|  | Evaluation committee report signed by all evaluation committee members |  |  |  | x |  |
|  | Records of proposer meetings, conferences, oral presentations, discussions, negotiations or proposal evaluations |  |  |  | x |  |