

## OFFICE OF THE COUNTY COMPTROLLER

**THE PERSONAL SERVICES PROCUREMENT RECORD CHECKLIST**

*This checklist must be filed with the Comptroller’s Office by all departments, offices and agencies procuring personal/consultant services* ***within 10 days of issuing an award letter*** *for all personal /consultant services procured by contracts or agreements.* ***Refer to Filing Instructions before completing.***

*Submit completed checklist by e-mail to* *comptroller.checklist@suffolkcountyny.gov**.*

|  |  |
| --- | --- |
| Department Name: |       |
| Contractor: |       | Vendor ID Code: |       |
| Contract Period: |       | Contract Amount: |       |
| RFP/RFQ No.: |       | Contract No.: |       |
| Date of Award: |       | Capital Project No.: |        |
| Fund No.: |     | Dept. Code: |     | Org. Code |      | Obj. Code: |      |

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| Description and scope of the service being procured: |
|       |

Procurement Method/Method of Award: (check all that apply)

[ ]  Non-Competitive Procurement (contract ≤ $1,000) [ ] Emergency (attach documentation)

[ ]  Solicitation of Quotes (contract ≤ $25,000) [ ] Preferred Source (attach documentation)

[ ]  RFP (attach copy) [ ] Single/Sole Source (attach documentation)

[ ]  RFQ (attach copy) [ ]  Local Preference

[ ]  Waiver (attach documentation) [ ] Other (attach explanation)

Additional Minimum Documentation required with the Checklist:

[ ]  Non-Competitive Procurement (contract ≤ $1,000 and all single/sole source contracts)

 [ ]  Justification for Selection [ ]  Justification of Reasonableness of Price

[ ]  Competitive Procurement (contract > $1,000)

 [ ]  Solicitation List (names and contact info) [ ] Notification of Preferred Source

 [ ]  Solicitation Document [ ] Summary of Quotes Received/Evaluated

 [ ]  RFP Scoring Evaluation Sheet/Memo [ ] RFP Opening Sheet/Submissions

 [ ]  Copies of Winning Proposal and Award Letter [ ] Justification for Less than 3 Quotes

 [ ]  No Conflict of Interest Disclosure Statements [ ] Justification of Award to other than

 [ ]  Written Notification of RFP the Lowest Proposer

 [ ]  Intro Resolution - [ ] RFP/RFQ Advertisement and Written

 (if only one proposal received) Approval of Advertisement

Complete items 1 through 3 for all Competitive Procurement (contract > $1,000):

1. Procurement Advertisement: (check all that apply)

 [ ]  Newspaper Advertisement Notices Attached

 [ ]  Waiver Attached

 [ ]  County Website Advertisement Attached

 [ ] Not applicable. Explain:

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|       |

2. Evaluation Process: (A separate document may be used, or department may reference specific documents and/or sections of the RFP if applicable.)

 a. Explain the process used in ensuring a competitive field:

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|       |

b. List the evaluation criteria used to evaluate the proposals:

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|       |

c. List evaluators/evaluation committee members. Provide Name, Title and Department:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name: |       | Title: |       | Dept: |       |
| Name: |       | Title: |       | Dept: |       |
| Name: |       | Title: |       | Dept: |       |
| Name: |       | Title: |       | Dept: |       |

 3. Summary of Competitive Procurement:

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| --- | --- | --- |
| a. | Number of proposals solicited:  |     |
| b. | Number of proposals received: |     |
| c. | Number of no-proposals received: |     |
| d. | Number of no replies:  |     |
| e. | Number of rejections:  |     |

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| --- | --- | --- | --- |
| Preparer Name and Title: |       | Date:  |       |
| Preparer Signature: |  | Telephone #: |       |
| OCC Auditor Name and Title: |  | Date: |  |