

## 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*](mailto:comptroller.checklist@suffolkcountyny.gov)*.*

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 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: | |  |