

### Drake University - Procurement Checklist

This procurement checklist is a guide for procurements (acquisition of goods and services, including consultants) as outlined in Drake University Procurement Policy dated 12/22/17.

	< \$10,000	Between \$10,000 and \$25,000	> \$25,000 – 150,000
Formal bid process required	No	Yes	Yes
Acceptable forms of bids	n/a	verbal, published catalogues, written	written only
Minimum number of bids required	n/a	3	3
Submit bid documentation to Senior Grants Accountant	No	Yes	Yes

1) Requester's Name \_\_\_\_\_

2) FOAPAL \_\_\_\_\_ Percentage \_\_\_\_\_

\_\_\_\_\_ Percentage \_\_\_\_\_

\_\_\_\_\_ Percentage \_\_\_\_\_

3) Goods/Services are allowable, reasonable and necessary? Yes  No

4) If this is a technology purchase, was IT consulted? Yes  No

5) Contractor selected from Drake Preferred Provider list? Yes  No

6) If not, list method of selection (i.e. internet quote, written vendor quote, etc.)

7) Are three bids attached if required? Yes  No

Bid #1 Amount \_\_\_\_\_

Bid #2 Amount \_\_\_\_\_

Bid #3 Amount \_\_\_\_\_

Equal criteria used to obtain comparable bid comparison. Yes  No

Explanation if not using lowest bid:

8) Was a Purchase Order issued? Yes  No

a. If Yes, please provide Purchase Order # \_\_\_\_\_

9) Is this a new vendor/contractor? Yes  No

10) If new contractor, was the following information provided to the Finance Department.

- a. Name Yes  No
- b. Physical location/street address Yes  No
- c. Form W-9 completed and signed by contractor Yes  No
- d. Insurance certificate (contractor only) Yes  No
- e. Sales tax exemption form, if applicable Yes  No

\_\_\_\_\_  
Requesting Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Approval Signature

\_\_\_\_\_  
Date