



Project Procurement Checklist

Up to \$500,000

Skilled Trades: \$5,000-\$99,999

- ☐ Paper Requisition (submit to Roxanne Crooks)
- ☐ Include the following with requisition:
 - ☐ Project Order Notification (e-blast). If less than \$10,000: email to Micro Firm
 - ☐ Quote(s) from contractor(s)
 - ☐ CO-9 (fully executed by Procurement VCCO and Contractor)
- ☐ Ensure PO approved **prior** to commencement of work.

Skilled Trades: \$100,000 - \$500,000

- ☐ Requisition (submit to Harry Smithson)
Requisition must include budget code, authorized amount for project, authorized signature
- ☐ Include with Requisition:
 - ☐ Name of project and project number (if applicable)
 - ☐ COMPLETE scope of work (include AE documents & drawings, as applicable)
 - ☐ Requested timeline (desired construction start date, substantial and final completion dates)
 - ☐ Predetermined Parking/laydown area (if applicable, input from Parking Service, as applicable)
 - ☐ Johnson Controls Quote (if applicable, state on bid form. Include quote, proper subcontractor language on bid form)
 - ☐ Siemens Quote (if applicable, state on bid form. Include quote, proper subcontractor language on bid form)
- ☐ Ensure PO approved **prior** to commencement of work.

Reminders:

- ☐ **Project Managers:** Plan for adequate time for preparing solicitation, updating front ends, posting of solicitation, pre-quote meetings, issuance of addenda, approval of Building Permit, etc.
- ☐ **Budget:** Include approved amount for construction only (should not include FF&E, AV)
 - ☐ Budget Signature: Certifies budget amount noted is available and allocated for construction
- ☐ **Specifications:** Ensure specs are Complete and Accurate prior to submitting solicitation request.
- ☐ **Audit:** Maintain all project associated documents to include:
 - ☐ Email Blast (if less than \$100,000)
 - ☐ RFQ and associated quotes
 - ☐ Bidder questions/correspondence/posted addenda
 - ☐ Purchase Order/copy of signed CO-9
 - ☐ Award Documentation, Bonds (as necessary), correspondence related to project completion

Resources

- ☐ Procurement Services website [here](#):
 - ☐ Instructions for Skilled Trades Contract
 - ☐ Micro Contractors List (direct for projects less than \$10,000)
 - ☐ Micro and SWAM Contractors List (\$10,000 - \$100,000)
 - ☐ CO9 Template and Skilled Trades Template

