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| **Requisition Checklist for RQ #:** |  |
| **Requestor Name, Email, and Phone #:** |  |
| **Department Contact Name, Email, Phone #:** |  |
| **Requesting Department:** |  |
| **Checklist Fields:** Please fill out this form completely and accurately. If information is incomplete or unclear, it may result in delay or rejection of your Requisition (RQ).  **Processing Time:** Average processing time for a RQ is about 10-12 weeks, if OCA receives complete information from the department. Please plan accordingly.  **Attachments:** Upload ALL attachments in the RQ header's "Add/Edit Comments." Do not attach them at the line level.  **Technology:** If this purchase involves any IT commodities or services (e.g. computers, hardware, software systems, servers, hardware/software maintenance, cloud services, on premises software and support, telecommunications or digital technology products or sensitive items, including surveillance technology, that transfer or transmit data and/or interact with the City's networks, etc.), please review OCA's Technology Purchasing Guidelines and follow the appropriate submission path based on what you are purchasing.  **For any questions you may have about City purchasing procedures, or about this checklist, please contact your assigned Office of Contract Administration (OCA) Supervising Purchaser.** | |
| **Question** | **Response** |
| 1. **Does this purchase include any surveillance-related items per Chapter 19B?**   Chapter 19B requires Departments seeking to procure surveillance technology obtain BOS approval by ordinance of a Surveillance Technology Policy under which the Department will acquire and use Surveillance Technology. Chapter 19B also forbids most City Departments from obtaining, accessing or using Face Recognition Technology or information obtained from Face Recognition Technology. Requisitions initiated by Departments for the purchase of surveillance-related items must upload the Department’s approved Surveillance Technology Policy or must demonstrate that the item is exempted from the Code (19.B.1 Definitions – “Surveillance Technology”). | Yes  No |
| 1. **If you replied YES to question 1, is the purchase exempt or did you attach an approved Policy?** | N/A – Replied No to Question 1.  Purchase falls into a 19B Exemption.  Name Exemption Category here:  Purchase does not fall into a 19B Exemption.  Approved 19B Policy uploaded to PS. |
| 1. **Have you reviewed the City's Term Contracts list to see if your item(s) or services can be purchased off of an existing term contract?** To review, go to <https://sfgov.org/oca/office-contract-administration-oca> and click “Current City Term Contracts for Commonly Purchased Goods and Services”. | Yes  No  If Yes, you should use the existing term contract for your purchase.  If No, you cannot use the term contract, explain why here:    Note: In certain cases, a related term contract may be modified to include the purchase. Check with OCA to discuss. |
| 1. **Is this a non-recurring, one-time purchase appropriate for the use of a RQ, or an ongoing need (monthly, annually, etc.)?** If this is recurring, contact OCA to initiate a possible term contract, which can be beneficial for multi-year procurements. | One-Time  Recurring  If this is a recurring purchase, what is the estimated annual value? |
| 1. **Is this purchase for commodities or general services?** | Commodity  General Services |
| 1. **If this purchase involves services, have you obtained DHR and/or Civil Service Commission approval?** If not, be aware that CSC approval must be obtained prior to PO award. | Yes, this includes services and CSC approval has been uploaded to PS.  No services, therefore CSC approval not required. |
| 1. **Is there any installation, repair, and/or maintenance involved in this purchase that requires construction related services?** | Yes  No  If Yes, explain the services here:  If this purchase falls under Chapter 6, this RQ may not be handled by OCA. Check with OCA to discuss. |
| 1. **Is this a "Sole Source" or "No Substitute" procurement?** To request a "Sole Source" or "No Substitute" waiver, go to <https://sfgov.org/oca/resources> for instructions. | Yes  No  If Yes, upload approval from OCA. Provide  OCA waiver #:  If No, this will be competitively bid out and the bid will include "or City Approved Equal." |
| 1. **If you replied NO to question 8, did you research, prepare, and provide/upload bid specifications which are accurate enough to advertise a competitive and successful bid?**   When preparing your specifications, you should:   * Avoid specific brand names and/or manufacturer/model #s, unless this has been approved by OCA as a Sole Source or No Substitute procurement. * Provide a description that includes the minimum essential characteristics and key features/standards to which it must conform to satisfy its intended use. * Provide a description that does not contain features which unfairly restrict competition.   Only when it is impractical or uneconomical to make a clear and accurate description of the technical requirements, then:   * a "Brand Name or City Approved Equal" description may be allowed as a means to define the performance or other salient requirements. * The specific essential characteristics and key features of the named brand which must be met must be provided and clearly stated. | Yes  N/A – Replied Yes to Question 8 |
| 1. **If you replied NO to question 8, did you research at least 3 similar alternate products that are acceptable?** Upload the 3 similar alternate products’ specifications to PS. | Yes, the manufacturers and model #s are:  1.  2.  3.  N/A – Replied Yes to Question 8 |
| 1. **Does this purchase use any grant funds?** | Yes  No |
| 1. **If you replied YES to Question 11, name the grant funding source.** | Yes  N/A - Replied No to Question 11  Grant funding source: |
| 1. **If you replied YES to Question 11, did you upload to PS all applicable documentation, e.g. grant checklist, grant terms, etc.?** | Yes  N/A - Replied No to Question 11 |
| 1. **If you replied YES to Question 11, has your deputy city attorney reviewed the P-220 and adjusted the terms & conditions, pursuant to the grant terms?**   RQs normally use the P-220 (go to <https://sfgov.org/oca/resources>) as its standard bid/contract terms and conditions. However, your federal or state grant provisions may have restrictions which can conflict with the City's standard terms & conditions, and therefore should be reviewed and adjusted for your specific grant by your deputy city attorney. This should also be discussed with OCA prior to RQ submittal. | Yes  N/A - Replied No to Question 11 |
| 1. **Is the item limited to authorized resellers/ distributors only?** | Yes  No  If yes, upload a letter, on manufacturer's letterhead, identifying the authorized resellers/distributors to PS. |
| 1. **Are there any required licenses or certifications that are needed for this procurement (e.g. Contractor's C-License, OSHA, UL, ETL, etc.)?** | Yes  No  If Yes, make sure they are incorporated into your specifications. |
| 1. **Is a Contractor’s license is required?** If yes, this may be construction or professional related services.Check with OCA to discuss. | Yes, the Contractor’s license(s) required is:  No |
| 1. **Have you included both billing and shipping addresses with "ATTN to" names for each in the RQ header comments?** | Yes |
| 1. **Are any RQ lines taxable?**   Taxes are not always disclosed on vendors' quotes. Departments are responsible for providing tax information to OCA. | Yes  No  If Yes, list the taxable RQ lines here: |
| 1. **Are there any special condition(s) to be added to the bid?**   Special conditions include delivery by a certain date, specific packaging, etc. | Yes  No  If Yes, describe special condition(s) here: |
| 1. **Did you include a freight line?**   City's standard terms have freight paid by the supplier and included into the pricing of the items. | Yes  No  If there is a compelling reason why a separate freight line necessary, explain why: |
| 1. **Are sample(s) required as part of this bid?**   If samples are required, include the address of where the samples should be sent to in your specifications. | Yes  No  If Yes, provide the name and address of where the samples should be sent to: |
| 1. **Research and list a minimum of 3 potential suppliers and their email addresses here.** OCA encourages Depts to list as many potential suppliers as possible to increase the likelihood of a successful bid. | 1.  2.  3.  4.  5. |
| 1. **In addition to the City's standard insurance requirements (General, Auto, and Workers Comp liabilities), have you checked with Risk Management to confirm if there are any additional policy limits, insurance coverages, and/or bonding that the vendor may need to obtain for this purchase (marine, garagekeepers, pollution liabilities, performance or fidelity bond, etc.)?** | Yes  Upload your correspondence with Risk Management to PS. |