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| **PO ID:** |  |
| **Department:** |  |
| **Dept Buyer Name:** |  |
| **Dept Buyer Email:** |  |
| **Checklist Fields:** Please fill out this form completely and accurately. Incomplete or unclear information may result in an audit finding by OCA and/or the Controller’s Office. *Upload ALL attachments (including this completed Checklist) in the PO header's "Add/Edit Comments." Do not attach them at the line level*. | |
| **Question** | **Response** |
| 1. **Authorized Prop Q Employee:** Employees authorized to make Prop Q PO purchases must have completed the required Prop Q training within last 3 years. Are you authorized to make a Prop Q purchase? | Yes, I am authorized to make a Prop Q purchase and have completed the required Prop Q training within the last 3 years. |
| 1. **Term Contracts:** Department are encouraged to use existing Term Contracts (TC) for all purchases. Can this purchase be completed using a [City Term Contract](https://sfgov.org/oca/citywide-term-contracts)?   *In certain cases, a related term contract may be modified to include the purchase. Check with OCA to discuss.* | No. There is no available TC for this purchase.  Yes. There is a TC for this purchase but it cannot be used because [ENTER REASON]. |
| 1. **Recurring Purchases:** If you anticipate making this purchase on a recurring basis, did you contact OCA to determine if it a Term contract is appropriate?   “Recurring purchases” means successive purchases for the same goods or services by the same division during any fiscal year. | N/A. Dept does not anticipate making this purchase on a recurring basis.  N/A. Although Dept may make this purchase again, it does not currently have a basis for knowing when and if that will happen.  Yes, Dept anticipates making this purchase on a recurring basis but the total value of the recurring purchases will be under $10,000 in any fiscal year.  Yes, Dept anticipates making this purchase on a recurring basis but OCA has advised that a Term Contract is not practical at this time. |
| 1. **Unauthorized Prop Q Purchases:** If this purchase falls into any of the following categories, you may not use Prop Q purchasing authority.  * Unbudgeted capital equipment * Items available on TCs * Equipment leases * Mattresses * Vehicles * Drones * Gift cards * IT/Telecom goods and/or services * Professional/Technical Services | Purchase does not fall into any of the unauthorized categorized for Prop Q purchasing authority. |
| 1. **$10,000 Limitation:** Is this purchase less than or equal to $10,000, inclusive of tax, delivery, and installation? **Reminder: Order splitting is prohibited.** | Yes. PO does not exceed $10,000, inclusive of tax, delivery, and installation. |
| 1. **Multiple Quotes and Purchasing Authority:** Where practical, departments should solicit three quotes, preferably to LBE’s where possible. *You do not need to collect three quotes. You are only encouraged to request three quotes.* Have you made an effort to obtain three price quotes? | Yes. Evidence of solicitation attempt (e.g. email) and all quotes received are uploaded to PeopleSoft. **In PS, choose the Prop Q-Bid purchasing authority.**  No. It was not practical to request three quotes because [ENTER REASON BELOW]. **In PS, choose the Prop Q-No Bid purchasing authority.** |
| 1. **~~General Services:~~** ~~Civil Service Commission approval is required for all services, regardless of purchasing authority. Did you obtain expedited Civil Service Commission approval through DHR for outsourcing this service?~~   **THIS REQUIREMENT IS PENDING CSC EVALUATION.** | ~~Yes. CSC/DHR approval uploaded to PeopleSoft.~~  ~~N/A. This is not a purchase for services.~~ |
| 1. **Supplier Compliance:** Did you confirm Supplier is compliant with the following City requirements?  * Business Tax Registration * CMD 12B * Chapter 12X | **Business Tax Registration**:  Yes. Supplier’s Business Tax Registration is current or deemed DND in PeopleSoft.  **CMD 12B:**  Yes. Supplier is 12B compliant.  No. Supplier is not 12B compliant. Waiver is uploaded to PeopleSoft.  **Chapter 12X:**  Yes. Supplier is not in a banned state.  No. Supplier is in a banned stated. Documentation of Exemption or Waiver, whichever is applicable, has been uploaded to PeopleSoft. |
| 1. **Insurance:** Insurance requirements vary with the amount of risk associated with a transaction. Check one box under each insurance document in the column to the right.   **Note:**  All “Additional Insured Endorsements” and “Waivers of Subrogation for Workers Compensation” must:   * Name the “City and Count of SF, its officers, agents, and employees”; or * Be written as blanket endorsements for any entity with whom the supplier has a “written contract.” | **Evidence of General Liability Insurance**  Not Required – *Minimal/inconsequential risk.*  Required and uploaded to PS.  Required but waived by Risk Manager. Waiver uploaded to PS.  **General Liability Additional Insured Endorsement**  Not Required – *Minimal/inconsequential risk.*  Required and uploaded to PS.  Required but waived by Risk Manager. Waiver uploaded to PS.  **Evidence of Auto Liability Insurance**  Not Required – *No use of personal/company vehicle and/or supplier is using 3rd party drop-ship.*  Required and uploaded to PS.  Required but waived by Risk Manager. Waiver uploaded to PS.  **Auto Liability Additional Insured Endorsement**  Not Required – *No use of personal/company vehicle and/or supplier is using 3rd party drop-ship.*  Required and uploaded to PS.  Required but waived by Risk Manager. Waiver uploaded to PS.  **Evidence of Workers Comp Insurance**  Not Required – *Supplier not entering City property and/or is using 3rd party drop ship*  Required and uploaded to PS.  Required but waived by Risk Manager. Waiver uploaded to PS.  **Workers Comp Waiver of Subrogation**  Not Required – *Supplier not entering City property and/or is using 3rd party drop ship*  Required and uploaded to PS.  Required but waived by Risk Manager. Waiver uploaded to PS. |
| 1. **Green Purchasing Requirements:** Does this purchase comply with City’s [Green Purchasing Requirements](https://sfgov.org/oca/green-purchasing-requirements)? | N/A – Purchase not covered by ENV’s Green Purchasing requirements.  Yes. Purchase complies with City’s Green Purchasing Requirements.  No. Purchase does not comply with City’s Green Purchasing Requirements. Department of Environment’s approval uploaded to PeopleSoft. |
| 1. **Chemicals or Hazardous items:** Safety Data Sheet (SDS) must be uploaded to PO and included with order delivery. | N/A – Purchase does not include chemicals or hazardous items.  SDS uploaded to PO.  PO instructs Supplier to provide MSDS w/ delivery. |