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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. |