

CONTRACT/OTA ORGANIZATION FILE CHECKLIST		Contractor
Contracting Officer		Contract Number

Tab	Item	Y	N	N/A
	Pre-Award Planning			
1	Procurement Team Members/ Organizations			
2	Coordination with Small Business Utilization Staff (AMS 3.6.1 & T3.6.1)			
	a. Set-aside: 8(a), Small Business, SDVOB			
3	Procurement Planning (T3.2.1)			
	a. Prism Requisition Request			
	b. Procurement Planning Documentation (market analysis/survey/etc.) (AMS 3.2.1.2.2 & T.2.1.2)			
	c. Single Source/Emergency Justification (AMS 3.2.2.4)			
	d. Rationale for brand name products & salient characteristics (T3.2.2.8)			
	e. Rationale for bid samples			
	f. Statement of Work, Specifications, TIEO's/Drawings/PWS			
	g. T&M/LH: PWS/SOW including labor categories, education/experience requirements, etc.			
	h. Recommendation for use of warranty (T3.10.4)			
	i. First article testing and approval (AMS 3.10.8)			
	j. Recommendation for use of options (T3.2.4)			
	k. Preservation and packaging requirements (T3.2.2.8)			
	l. Justification for Liquidated Damages (T3.8.7)			
	m. Independent Gov. Cost Estimate (T3.2.1)			
	n. ISO 9000 Certification Review			
	o. Evaluation Plan/Scoring Criteria (T3.2.2)			
	p. Government Furnished Property (AMS 3.10.3 & T3.10.3)			
	q. Info. Supporting Construction of Agency-Owned Improvement form			
	r. CFO review if more than \$10M (including all options) (T3.2.1.4)			
	s. CIO Review if more than \$250,000 and is for information resources (Including all options) (T3.2.1)			
	t. Consideration of Agency Wide Contracts (3.2.1.2.3)			
	u. Milestone Schedule entered into PRISM			
	v. Export Control Review (T3.6.4)			
4	Single Source (AMS 3.2.1.3.7 & 3.2.2.4)			
	a. Procurement Team Determination			
	b. Management Review			
	c. Legal Review (T1.15)			

Tab	Item	Y	N	N/A
5	Coordination with Quality Assurance Div. (AMS 3.2.1.3.4 & T3.10.4)			
6	SIR Review			
	a. Legal review of SIR (T1.15)			
	b. Requiring organization review			
	c. Review of SIR by Security (AMS 3.14 and T3.14.1)			
7	Security			
	a. Classified Security Requirements			
	b. Information, Personnel, and Physical Security as it related to suitability requirements and coordination			
	c. Contractor Position Risk Sensitivity Designation Level Record (FAA Form 1600.77)			
8	Unsolicited Proposal and Documentation (AMS 3.2.2.6 & T3.2.2.6)			
9	Wage Determinations (T3.6.2)			
10	Market Survey/Analysis (AMS 3.2.1)			
11	Signed Non-disclosure Agreement /Conflict of Interest Certification (AMS 3.1.5/ 3.1.6 & T3.1.5/ 3.1.6)			
12	Organizational Conflict of Interest Statements (AMS 3.1.7 & T3.1.7)			
13	Procurement Integrity Act (team briefing) (AMS 3.1.8 & T3.1.8)			
14	Determination to use Commercial Items (AMS 3.2.2.5)			
15	Unidentified Letter Contracts Doc. (T3.2.4)			
16	Screening Information Request (SIR) (AMS 3.2.2.3.1.2.1)			
17	Public Announcement (over \$150,000) (AMS 3.2.1.3.1.1 & T3.2.2)			
18	Requests for SIR from Announcement			
19	SIR Mailing List			
20	SIR Distribution Sheet			
21	SIR Amendment(s)			
22	SIR Responses/Abstract			
23	Communications with Offerors (AMS 3.2.2.3.1.2.2)			
24	Preproposal Conference			
25	Late Offers			
26	Mistakes in Offer			
27	No Offer Correspondence			
28	Original of Unsuccessful Offers			
29	Letters to Unsuccessful Offerors			
30	Verification of Offers			
31	Procurement Team Evaluation Reports and Plans (AMS 3.2.2.3.1.2.3)			
	a. Evaluation documentation			
	b. Evaluation Team Members			
	c. Evaluation Written Report			
	d. T&M/LH: Evaluation of Employee Resumes			

Tab	Item	Y	N	N/A
32	Extension of Acceptance Period			
33	Successful Offeror's Reps/Certs (Sec. K)			
34	Business Declaration Form (T3.6.1)			
35	Successful Offeror's Cost/Price Proposal			
36	Successful Offeror's Technical Proposal			
37	Contracting Officer's Responsibility Determination (to include checking System for Award Management (SAM))(AMS 3.2.2.2 & T3.2.2.7)			
38	EEO Compliance/OFCCP Clearance (Over \$10M) (AMS 3.6.2.1 & T3.6.2)			
39	Pre-Award Survey Information (T3.2.2.7)			
40	DCAA Field Reports, DCAA Audit arrangements for Cost Type Contracts >\$100M, and consideration for <\$100M (Includes T&M, Cost Type) (AMS 3.2.3.2 & T3.2.3)			
41	Certificate of Current Cost or Pricing Data (AMS 3.2.3.3.1.1 & T3.2.3)			
42	Subcontracting Plan with coordination/ review by the SB Utilization Office (AMS 3.10.2 & T3.10.2)			
43	Cancellation of RFO (T3.2.2)			
44	Award Decision Document/Negotiation Memorandum (AMS 3.2.2.3.1.2.5)			
	a. Price Analyst Report/Concurrence			
	b. Management Review			
	c. Legal Concurrence (T1.15)			
	d. CFO Review (Over \$10M) (T3.2.1.4)			
45	Congressional/Public Affairs Notification (Over \$3.5M) (AMS 3.13.5 & T3.13.1)			
	Award Data and Contract			
46	Protest Documentation (AMS 3.9)			
47	Lessons Learned Findings (AMS 3.2.2.3.1.5)			
48	Contract Documents/Prism Award			
49	Award Letter			
50	FPDS (T3.13.1)			
51	Contract Distribution Sheet			
52	Contract award notification (T3.13.1)			
53	Contractor Debriefing(s) (AMS 3.2.2.3.1.4)			
54	Notice to Proceed (NTP)			
55	Post Award/Preconstruction Conference (T3.8.7)			
56	Subcontractor Statement & Acknowledgement (SF-1413)			
57	Bonding (AMS 3.4.1 & T3.4.1)			
58	Insurance (AMS 3.4.1 & T3.4.1)			
	Post Award Documentation			
59	Letters of Delegation of Contracting Officer Representative (COR)			
	a. Letters of COR Delegation Sent			
	b. Signed Letters of COR Delegation by COR Received			
	c. Letter of Nomination of COR			
	d. Training/Certification of COR Complete			
	e. Notification of COR Appointment to Acquisition Career Manager			
	f. Notification of COR Revocation Letter to Acquisition Career Manager (T3.10.1)			
60	CPARS Evaluation (T3.10.1A16)			
61	Submittals/Certifications			
62	Tax Exemption			
63	Payrolls and Labor Correspondence			

Tab	Item	Y	N	N/A
64	General Correspondence			
65	Government Property (AMS 3.10.3 & T3.10.3)			
	a. List of property			
	b. Review/approval of contractor's property control system			
	c. Contractually required reports			
	d. Periodic inventories			
66	Construction Waste Management (T3.6.3)			
	a. Waste Management Plan			
	b. Waste Diversion Summary Reports			
67	Record of Payment (AMS 3.3.1.2 & T3.3.1)			
	a. Invoices			
	b. Progress Payment documentation			
	c. Periodical Estimate			
	d. Payment approvals/certifications			
	e. Delphi Report (final payment verification)			
68	Security reports and coordination with security staff (AMS 3.14 & T3.14.1)			
69	Freedom of Information Act (FOIA) Requests (AMS 3.7 & T3.7)			
70	Subcontracting plan- Quarterly and Semi-Annual Reports (T3.6.1)			
71	Investigations, Violations, and Legal Items			
	a. Complaints			
	b. Patent and Copyright determination			
	c. Anti-Trust Violation			
	d. Labor Investigations/Interviews (T3.6.2)			
72	Acceptance Reports consisting of Materiel Requisitions/Issue/Receipt and Inspection Report of Material and/or Services			
73	Weekly Progress Reports/Daily Logs (T3.8.7)			
74	CAI/JAI Inspections			
75	Receiving Reports			
76	Price Re-determination Data			
77	Application for Contractual Adjustment			
78	Final Release			
	a. Statement of Liquidated Damages (T3.8.7)			
	b. Final Delivery (T3.10.1)			
	c. Contractor Release (T3.10.1)			
79	Claims and Disputes			
	a. Cases			
	b. Termination (T3.10.6)			
	c. Findings and Decisions of CO			
	d. Appeals from decisions			
	Contract Closeout			
80	Contractor Evaluation			
81	Past Performance (T3.2.2)			
82	Closeout (AMS 3.10.10 & T3.10.1)			
	a. Contract File Completion Statement			
	b. Closeout of Completed Contracts			
	c. Contract Closeout Checklist			
	d. Property Clearance/Distribution			
	Modifications			
83	Modifications (T3.10.1)			