

Blanket Purchase Agreement Checklist

Base Contract Number:

Contractor Point of Contact:

Award Date:

Contracting Officer:

Base Period of Performance:

Contracting Officer Representative:

Contractor Name:

Procurement Planning					
TAB	Plan Procurement	AMS Reference	Y	N	N/A
	Procurement Team Members/Organizations				
2	Procurement Request Package	3.2.1 & T3.2.1			
	Procurement System Generated Requisition	T3.2.1			
4	Consideration of Mandatory Sources	T3.2.2.5.A.3			
	Copy of GSA Schedule & Ordering Requirements	T3.8.3			
	Market Analysis	3.2.1.2 & T3.2.1.2			
	Document: Draft Single Source/Emergency Justification	3.2.1.3.7, 3.2.2.4 & T3.2.2.4 Procurement Templates			
	Justification to Establish a BPA	T3.2.2.5, T3.8.3			
	Document: Brand Name Mandatory/Brand Name or Equal Template	T3.2.1 & T3.2.2.8			
3	Document: Independent Government Cost Estimate	T3.2.1 & T3.2.3			
1	Coordination with Small Business Program Staff (AAP-20) for Procurements est. over \$250K	3.6.1 & T3.6.1			
	Document: Small Business Set Aside Determination and Coordination Form for 8(a), Small Business, Hub-Zone, SDVOSB, WOSB	3.6.1 & T3.6.1, Procurement Templates			
	Market Survey/Research/Analysis	3.2.1.2.1 & T3.2.1.2			
	Buy American Act/Preference Certification or Waiver	T3.6.4			
8	Document: Final Single Source Justification Form	3.2.1.3.7, 3.2.2.4 & T3.2.2.4, Procurement Templates			
	Service Organization Official				
	COR, if applicable				
	Management & Legal Review & Coordination if Procurement > \$100 K (including all options)	T1.15			
	Document: Procurement Plan required for procurements over \$25K (Template A Simplified and Commercial & Template B Other Than Simplified and Commercial)	3.2.1.1 & 3.2.1.2.2, Procurement Templates			
TAB	Procurement Reviews	AMS Reference	Y	N	N/A
10	Export Control Review	T3.6.4.A.14			
	Coordination with Quality Assurance Division	T3.10.4			
6	CIO Review if Procurement if equal or greater than \$250K and is for Information Resources	T3.2.1.A.3			
	CIO IT Procurement Review and Approval Form	Procurement Templates			
7	CFO Review if Procurement if equal or greater than \$10 MIL (including all options)	T3.2.1.4			
	Document: SCRB Phase I Template	Procurement Templates			
	Document: SCRB Phase II Template	Procurement Templates			
	FAE Approval (if recurring needs are across multiple service organizations)	T3.2.1.A.18			
	Document: Program Benefit, Admin Costs, Methodology for Fees, etc.	T3.2.1.A.18			
TAB	BPA Development and Review	AMS Reference	Y	N	N/A
6	Blanket Purchase Agreement	T3.2.2.5.A.3			
	(Clauses: Example NDAA Sec. 889, Buy American Act/Preference Clauses etc.)				
	Evaluation Plan/Scoring Criteria	T3.2.2.3.A.4			
	Wage Determinations	T3.6.2.A.6 & T3.6.3.A.10			
	BPA Review				
	Service Organization Review				
9	Security Review	3.14 & T3.14.1			
	Classified Security Requirements				
	Information, Personnel, and Physical Security as it related to suitability requirements and coordination				



	Document: OPM Position Designation Automated Tool	T3.14.1A.3 e (2)(b) (ii)*			
	Management & Legal Review & Coordination if Procurement > \$100 K (including all options)	T1.15			
Source Selection					
TAB	Manage Solicitation	AMS Reference	Y	N	N/A
	Signed Non-Disclosure Agreement/Conflict of Interest Certification for procurements of \$150K or greater	3.1.5, 3.1.6, T3.1.5, T3.1.6/Procurement Templates			
	Document: Procurement Integrity Act (Team Briefing)	3.1.8 & T3.1.8			
11	Public Announcement (over \$150K) (Request for Quotation)	3.2.1.3.1.1 & T3.2.2.3.B.1			
	RFQ Amendments	T3.2.2.3.A.2c			
	SIR Responses & Verification of Offers (List of FSS Contractor surveyed and their prices quoted)	T3.1.8			
	Buy American Act/Preference Certification or Waiver	T3.6.4			
	Communication with Offerors (Late Offers, Mistake in Offer, etc.)	3.2.2.3.1.2.2 & T3.2.2.3.A.7			
	Cancellation of SIR/RFQ	T3.2.2.3.B.3			
TAB	Evaluate Responses	AMS Reference	Y	N	N/A
	Procurement Team Evaluation Reports & Plans	3.2.2.3.1.2.3 & T3.2.2.3			
	Evaluation Documentation	3.2.2.3.1.2.3 & T3.2.2.3.A.9(d)			
	Evaluation Team Members	3.2.2.3.1.2.3 & T3.2.2.3			
	Evaluation Written Report	3.2.2.3.1.2.3 & T3.2.2.3			
	T&M/LH: Evaluation of Employee Resumes	3.2.2.3.1.2.3 & T3.2.2.3			
13	Responsibility Determination Documentation (to include checking Sam.gov)	T3.2.2.7			
	Pre-Award Survey Information	T3.2.2.7			
	Document: EEO Compliance/OFCCP Clearance (Over \$10 MIL)	AMS 3.6.2.1 & T3.6.2.A.14			
	DCAA Field Reports, DCAA Audit Arrangement for Cost Type Contract > \$100 MIL, and Consideration for <\$100 MIL (Included T&M, Cost Type)	T3.2.3.A.1.d			
	Certificate of Current Cost or Pricing Data	T3.2.3			
	Subcontracting Plan with Coordination with Small Business Program	T3.6.1			
12	Award Decision Document/Negotiation/SSO Decision	3.2.2.3.1.2.5 & T3.2.2.3.A.10			
	Cost/Price Report	T3.2.2.3.A.9e			
	Management & Legal Review & Coordination if Procurement > \$100 K (including all options)	T1.15			
	CFO Review if Procurement if equal or greater than \$10 MIL (including all options)	T3.2.1.4			
	Congressional/Public Affairs Notification (DOT Form 4220.41)	T3.14.1.A.3, Procurement Template			
TAB	Make Award	AMS Reference	Y	N	N/A
	Award BPA	T3.2.2.5			
	Award Letter	T3.2.2.3			
	BPA w/ Attachments Award Notification - Contractor, Payment Office, Requiring Service Organization, COR, Budget/Finance Office, Security Office, Small Business Program Office, Property Office, AFA-100, AFI-100, QRO, Director of Acquisition and Contracting at Headquarters	T3.2.2.3.A.10			
	Contractor Debriefings	3.2.2.3.1.4 & T3.2.2.3.A.11			
	Protest Documentation	T3.2.2.3.A.11			
	Lessons Learned Findings	3.2.2.3.1.5			
	Document: Authorization to Proceed	Procurement Samples			
	Post Award/Preconstruction Conference/Kick Off Meeting	T3.8.7			
Contract Administration					
TAB	Manage Award	AMS Reference	Y	N	N/A
	Document: Letters of Delegation of Contracting Officer Representative	T3.10.1.A.3, Procurement Templates			
	Training/Certification of COR Complete	T3.10.1.A.3			
	Notification of COR Appointment to Acquisition Career Manager	T3.10.1.A.3			
	Notification of COR Revocation Letter	T3.10.1.A.3			
	Annual Review of BPA Files	T3.2.2.5 (A)(3)(k)			
	CPARS Evaluation	T3.10.1.B.9			
	Tax Exemption	T3.4.2			
	Payrolls and Labor Correspondence	T.3.6.2			
	General Correspondence	T3.10.1			



	Government Property (List of Property, Review/Approval of Contractor's Property Control System, Reports, & Periodic Inventories)	3.10.3 & T3.10.3			
	Record of Payment (Invoices, Progress Payment Documentation, Periodical Estimates, Payment Approvals/Certifications, Delphi Report)	3.3.1.2 & T3.3.1			
	Security Reports	3.14 & T3.14.1			
	FOIA Requests	T3.1.6.A.4			
	Subcontracting Plan (Quarterly and Semi-Annual Reports)	T3.6.1			
	Investigations, Violations, and Legal Items (Complaints, Patent & Copyright, Anti-Trust etc.)				
	Delivery Tickets	T3.2.2.5.A.3			
	Equitable Adjustments Documentation	T3.10.A.5			
	Modifications	T3.10.1			
	Document: Option Exercise Notification	T3.2.4.A.9			
	Justification for Modification	T3.10.1			
	Management & Legal Review & Coordination if Procurement > \$100 K (including all options)	T1.15			
	Procurement Team Review of Final Modification Documents	T1.15			
	Modification Documents (PRISM Award, Proposal Documents, etc.)	T3.10.1			
	General Correspondence	T3.10.1			
TAB	Closeout & Terminate Award	AMS Reference	Y	N	N/A
	Claims and Disputes				
	Cases				
	Termination	T3.10.6			
	Finding and Decisions of CO	T3.10.1.B.4			
	Appeals from Decisions				
	CPARS (Past Performance)	T3.10.1.B.9			
	Closeout	3.10.10 & T3.10.1			
	Document: Contract Closeout Checklist & Contract File Completion Statement	T3.10.1.B.4, Procurement Checklist			
	Property Clearance/Distribution				
	Final Release Documentation	T3.10.1.B.4			
	Statement of Liquidated Damages				
	Final Delivery	T3.10.1.B.4			
	Document: Contractor Release (DOT-4220.4)	T3.10.1.B.4, Procurement Forms			

