

## Blanket Purchase Agreement Checklist

**Base Contract Number:**

**Contractor Point of Contact:**

**Award Date:**

**Contracting Officer:**

**Base Period of Performance:**

**Contracting Officer Representative:**

**Contractor Name:**

*The tab numbers are for EDOCs purposes only and are not meant to be followed chronologically.*

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			
	<b>Document:</b> 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			
	<b>Document:</b> Brand Name Mandatory/Brand Name or Equal Template	T3.2.1 & T3.2.2.8			
3	<b>Document:</b> Independent Government Cost Estimate	T3.2.1 & T3.2.3			
1	Coordination with Small Business Program Staff (AAP-20) for Procurements est. over AMS risk threshold.	3.6.1 & T3.6.1			
	<b>Document:</b> 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	<b>Document:</b> 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				
	<b>Management &amp; Legal Review &amp; Coordination</b> if Procurement > AMS risk threshold (all options)	T1.15			
	<b>Document:</b> 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 the AMS risk threshold 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 \$15 MIL (including all options)	T3.2.1.4			
	<b>Document:</b> SCRB Phase I Template	Procurement Templates			
	<b>Document:</b> SCRB Phase II Template	Procurement Templates			
	FAE Approval (if recurring needs are across multiple service organizations)	T3.2.1.A.18			
	<b>Document:</b> 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				



	<b>Document:</b> OPM Position Designation Automated Tool	T3.14.1A.3 e (2)(b) (ii)*			
	<b>Management &amp; Legal Review &amp; Coordination</b> if Procurement > AMS risk threshold (including all options)	T1.15			
<b>Source Selection</b>					
<b>TAB</b>	<b>Manage Solicitation</b>	<b>AMS Reference</b>	<b>Y</b>	<b>N</b>	<b>N/A</b>
	<b>Signed Non-Disclosure Agreement/Conflict of Interest Certification for procurements greater than AMS risk threshold</b>	3.1.5, 3.1.6, T3.1.5, T3.1.6/Procurement Templates			
	<b>Document:</b> Procurement Integrity Act (Team Briefing)	3.1.8 & T3.1.8			
<b>11</b>	<b>Public Announcement (if Procurement &gt; AMS risk threshold) (Request for Quotation)</b>	3.2.1.3.1.1 & T3.2.2.3.B.1			
	<b>RFQ Amendments</b>	T3.2.2.3.A.2c			
	<b>SIR Responses &amp; Verification of Offers (List of FSS Contractor surveyed and their prices quoted)</b>	T3.1.8			
	<b>Buy American Act/Preference Certification or Waiver</b>	T3.6.4			
	<b>Communication with Offerors (Late Offers, Mistake in Offer, etc.)</b>	3.2.2.3.1.2.2 & T3.2.2.3.A.7			
	<b>Cancellation of SIR/RFQ</b>	T3.2.2.3.B.3			
<b>TAB</b>	<b>Evaluate Responses</b>	<b>AMS Reference</b>	<b>Y</b>	<b>N</b>	<b>N/A</b>
	<b>Procurement Team Evaluation Reports &amp; Plans</b>	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			
<b>13</b>	<b>Responsibility Determination Documentation (to include checking Sam.gov)</b>	T3.2.2.7			
	Pre-Award Survey Information	T3.2.2.7			
	<b>Document:</b> 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			
<b>12</b>	<b>Award Decision Document/Negotiation/SSO Decision</b>	3.2.2.3.1.2.5 & T3.2.2.3.A.10			
	Cost/Price Report	T3.2.2.3.A.9e			
	<b>Management &amp; Legal Review &amp; Coordination</b> if Procurement > AMS risk threshold (including all options)	T1.15			
	<b>CFO Review if Procurement if equal or greater than \$15 MIL (including all options)</b>	T3.2.1.4			
	<b>Congressional/Public Affairs Notification (FAA form 4400-35)</b>	T3.14.1.A.3, Procurement Template			
<b>TAB</b>	<b>Make Award</b>	<b>AMS Reference</b>	<b>Y</b>	<b>N</b>	<b>N/A</b>
	<b>Award BPA</b>	T3.2.2.5			
	<b>Award Letter</b>	T3.2.2.3			
	<b>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</b>	T3.2.2.3.A.10			
	<b>Contractor Debriefings</b>	3.2.2.3.1.4 & T3.2.2.3.A.11			
	<b>Protest Documentation</b>	T3.2.2.3.A.11			
	<b>Lessons Learned Findings</b>	3.2.2.3.1.5			
	<b>Document:</b> Authorization to Proceed	Procurement Samples			
	Post Award/Preconstruction Conference/Kick Off Meeting	T3.8.7			
<b>Contract Administration</b>					
<b>TAB</b>	<b>Manage Award</b>	<b>AMS Reference</b>	<b>Y</b>	<b>N</b>	<b>N/A</b>
	<b>Document:</b> 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			
	<b>Annual Review of BPA Files</b>	T3.2.2.5 (A)(3)(k)			
	<b>CPARS Evaluation</b>	T3.10.1.B.9			
	<b>Tax Exemption</b>	T3.4.2			
	<b>Payrolls and Labor Correspondence</b>	T.3.6.2			
	<b>General Correspondence</b>	T3.10.1			



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

