



PROCUREMENT FORM

For Procurement Review – Please route Contract through Douglas Allen in Finance

Please fill out this form completely or it will be returned to you prior to review, approval, or filing. If a response is not applicable, please use "N/A" – Do Not Leave Blanks.

Date Submitted for Review: _____

PROCUREMENT PROCESS – NOTE: IGAs, Easements, Lease/Property Acquisition and Development Agreements do not require Procurement Review. However, they must still be seen by Legal Services. All Contracts must be reviewed and signed off by the Town Manager & Legal Services prior to going to Council.

Procurement Type (check one):

- | | | | |
|---------------------------------------|---|--|-------------------------------------|
| <input type="checkbox"/> Construction | <input type="checkbox"/> Contract | <input type="checkbox"/> Change Order/Modification | <input type="checkbox"/> On Call |
| <input type="checkbox"/> IGA | <input type="checkbox"/> Development Agreement | <input type="checkbox"/> Amendment | <input type="checkbox"/> Blanket PO |
| <input type="checkbox"/> Easement | <input type="checkbox"/> Lease/Property Acquisition | <input type="checkbox"/> Other _____ | |

IDENTIFYING INFORMATION: (Please fill in each field)

Requesting Department: _____

Requesting Employee Name: _____

Vendor Name: _____

Vendor Address: _____

Vendor Phone: _____

Brief Summary of the Services to be provided: _____

Terms:

Start Date: _____ Expiration Date: _____

Contract Amount \$: _____

CONTRACT REVIEW REQUIREMENTS

Designate what method you used to arrive at this contract and whether the item is budgeted for:

Requirements:

- ☐ Informal (\$1-\$49,999)
 - ☐ \$5k to \$24,999 (3 Verbal Quotes)
 - ☐ \$25,000 to \$49,999 (3 Written Quotes)
- ☐ Formal - \$50k and more (Invitation to bid/ RFP)
- ☐ Sole Source / Competition Impracticable - \$5k or more (Document basis)
- ☐ Cooperative agreement (\$5k to \$24,999) (3 Verbal Quotes)
- ☐ Cooperative agreement (\$25k to \$49,999) (3 Written Quotes)
- ☐ Cooperative agreement (\$50k and more) (Contract legal review)

Approval Levels:

- ☐ Specifically Budgeted
 - ☐ Town Manager Delegated Approval (\$1 to \$24,999)
 - ☐ Town Manager Approval (\$25k to \$99,999)
 - ☐ Town Council Approval (\$100k and more)
- ☐ Not Budgeted
 - ☐ Town Manager Approval (\$1 to \$24,999)
 - ☐ Town Council Approval (\$25k and more)

Cooperative Agreement and Contract Number if selected: _____ GL Code: _____

Additional Funding Source? ☐ General Fund – Identify: _____ ☐ Other – Identify: _____

ADDITIONAL COMMENTS? _____

REVIEWED AND APPROVED:

☐ Initiated By/Other: _____ Date: _____

☐ Department Director: _____ Date: _____

☐ Procurement: _____ Date: _____

☐ Finance: _____ Date: _____

☐ Legal: _____ Date: _____

☐ Town Manager: _____ Date: _____