



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: _____