

## Texas Woman's University – Procurement and Contract Services

### Contract Checklist

Company Name	
Contract Name	
Contract Number/Purchase Order Number	
Total Contract Amount (original term)	
Annual Contract Amount*	
Contract Term	
Renewal Description	
Contract Manager	
Contract Administrator (Procurement)	

*The Contract Checklist shall be used by the Contract Administrator to verify compliance with contract requirements.*

### Solicitation Phase

	Yes	N/A	Date/Initial	Notes
1. Vendor Hold Search				
a. USAS (if you have TIN#)/Vendor Hold website search (if you only have the vendor name)				
b. SAM Search				
2. Is vendor an employee of TWU?				
3. Is vendor related to an employee of TWU?				
4. Solicitation Method: _____				
a. Sole Source Purchase (form has been completed/signed)				
b. Emergency Purchase (form has been completed/signed)				
c. Exempt Purchase				
5. Post in ESBD/TBUY				
6. Response Evaluation				
a. Number of responses: _____				
b. Financial Summary				
c. Non-Disclosure/Conflict of Interest from Contract Review Team				
d. Response evaluation forms from Contract Review Team				

**Solicitation Phase continued**

	Yes	N/A	Date/Initial	Notes
e. Response clarification				
f. BAFO documentation				
g. Intent to award letter to successful Respondent				
7. HUB Subcontracting Requirement (GE \$100,000)				
8. BOR Compliance BOR Item #: _____ Meeting Date: _____				
a. Above \$500,000 per annum				
b. Consultant Contract in excess of \$25,000				
c. Commitment of resources for more than 4 years/no out-clause				
9. Specialized contracts (if applicable)				
a. Outside counsel contracts – Attorney General approval				
b. Audit contracts – State Auditor’s Office approval				
c. Approved Cooperative Partner*				
i. Partner Name: _____				
ii. Contract Number: _____				
d. OGC Standard Contract*				
e. OoT contracts – VPAT & Assessment documentation				
f. ORSP Review (if applicable)				
g. Texas Ethics Commission disclosure ( <b>above \$1,000,000 or BOR approval required</b> )				
10. Finance & Risk Management Review				
a. Performance Bond (if required)				
b. Payment Bond (if required)				
c. Insurance Certificate				

**Legal Review Phase**

	Yes	N/A	Date/Initial	Notes
1. Contract Number: _____				
2. Contracting legal reviewer: _____				

\*OGC review is not required if: the contract is less than \$40,000 AND the contract is submitted on an approved contract template from OGC, the submission is a renewal of a previously approved contract, and/or a cooperative contract/agreement is utilized.