**Preliminary Review Procurement Checklist**

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| **Completed By:** | **Christina Rosado** | **Date:** | **October 30, 2024** |
| **Agency:** | **Depart of Adult Correction** | **Division:** | **Purchasing** |
| **Procurement Lead Name:** | **Christina Rosado** | **Procurement Director:**  | **Joanne Rowland** |
| **Contact Telephone:** | **919-324-6381** | [**P&C Strategic Sourcing Team**](https://ncadmin.nc.gov/about-doa/purchase-and-contract/who-my-pc-service-team)**:**  | **Service Team #3** |
| **Contact email:** | **Christina.rosado1@dac.nc.gov** |
| **Solicitation Title:**  | **Corrugated Packing Cartons 52-IFB-1335961127-CRR** |
| **Business Justification:** | **Purpose**: The Purpose of this invitation for Bids is to seek competitive sealed bids from qualified vendors to establish an Agency Specific Term Contract to provide Corrugated Packing Cartons on an “as needed” basis if and when ordered by NC Department of Adult Correction Enterprise Print Plant per bid specifications during term of the contract.**Background:** DAC Enterprise Print Plant utilizes the packing cartons to ship orders for their customers.  |
| **Goal Award Date:** | November 29, 2024 |

**Please include a copy of this checklist when submitting your procurement request package to DOA- Division of Purchase and Contract (P&C).**

***Note: This is a preliminary list and should not be considered all inclusive. P&C reserves the right to request additional information based upon the documentation submitted. Please include all information as applicable.***

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| **Section 1: Minimum Requirements for All Procurement Requests** | **Answer** |
|  | Yes | No | N/A |
|  | Are the goods or services available from [**Correction Enterprise**](https://ncadmin.nc.gov/media/2840/open)? |[ ] [x] [ ]
|  | Are the goods or services available from any [**Non-Profit Work Center for the Blind and Severely Disabled**](https://ncadmin.nc.gov/media/13969/open)?  |[ ] [x] [ ]
|  | Are the goods or services available from any other [**Statewide Term Contract**](https://ncadmin.nc.gov/government-agencies/procurement/statewide-term-contracts)?  |[ ] [x] [ ]
| 1.
 | Is this a request for a preliminary review? If yes, proceed to Section 2. |[x] [ ] [ ]
|  | Is this a request to waive competition to procure goods or services for a dollar value exceeding your delegation? If yes, proceed to Section 3. |[ ] [ ] [ ]
|  | Is this a solicitation for Consultant Services? If yes, attach the required justification and agency endorsement letter.  |[ ] [ ] [ ]
|  | Was the solicitation document prepared using the latest P&C solicitation form? (Compare the date at the bottom of your solicitation to the date on the corresponding document on the P&C PIP or NC eProcurement System Sourcing Template).  |[ ] [ ] [ ]
|  | **1) If you answered “Yes” to questions 1 through 3, you must enter a requisition in the** [**NC eProcurement System**](https://eprocurement.nc.gov/login) **using the appropriate STC.****2) This checklist and all required documentation must be completed and attached to your request when submitted to DOA – P&C.*** NC eProcurement Ariba Sourcing requests should be submitted in the Sourcing project.
* Non-Ariba users must submit using the appropriate [eForm](https://ncconnect.sharepoint.com/sites/pcagencyview/SitePages/eForms.aspx) from the Procurement Information Portal (PIP).
* **NOTE:** If you have questions, consult your Department’s Purchasing Office or the [DOA-P&C Service Team](https://ncadmin.nc.gov/about-doa/purchase-and-contract/who-my-pc-service-team) assigned to your Department.
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| *Reference:*  | [01 NCAC 05B .0301 CONTRACTING REQUIREMENTS](http://reports.oah.state.nc.us/ncac/title%2001%20-%20administration/chapter%2005%20-%20purchase%20and%20contract/subchapter%20b/01%20ncac%2005b%20.0301.pdf)01 NCAC 05D .0203 REQUESTS FOR AUTHORITY TO CONTRACT WITH CONSULTANTS |

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| **Section 2: Minimum Requirements for RFPs and IFBs** | **Answer** |  |
|  | Yes | No | N/A |
|  | Have you received approval for any intended contract term longer than three (3) years? If yes, attach approval.  |[ ] [ ] [x]
| 1.
 | Have you attached a draft copy of the solicitation document? |[x] [ ]  - |
|  | Does the solicitation contain a concise and understandable statement of the agency’s intent? |[x] [ ]  - |
|  | Does the solicitation clearly describe all specifications, requirements, tasks, milestones, and deliverables? |[x] [ ] [ ]
|  | Does the solicitation indicate if it will be a one-step or two-step evaluation process? *(RFPs only)* |[ ] [ ] [x]
|  | Have you developed an evaluation methodology that conforms to the one-step or two-step process indicated in the solicitation? *(RFPs)* |[ ] [ ] [x]
|  | **After the solicitation has been developed, submit a request for a preliminary review to the NC eProcurement Ariba Sourcing project or through a PIP** [**Preliminary Review Request**](https://ncconnect.sharepoint.com/sites/pcagencyview/SitePages/eForms.aspx)**.**  |  |
| *Reference:*  | 01 NCAC 05B .0203 DEVELOPMENT OF SPECIFICATIONS01 NCAC 05B .0301 CONTRACTING REQUIREMENTS01 NCAC 05B .0314 SOLICITATION DOCUMENTS 01 NCAC 05B .0316 ADVERTISEMENT REQUIREMENTS |

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| **Section 3: Waivers of Competition**  | Yes | No |
|  | Is this a request for a waiver of competition?  |[ ] [x]
|  | Does the justification address why the vendor is the only qualifying provider and/or how the selected waiver condition applies? (See 01 NCAC 05B .1401.)  |[ ] [ ]
|  | Have you attached draft copy of the solicitation document (RFQ)?**NOTE:** A draft solicitation document (RFQ) must be attached to your request. |[ ] [ ]
| *Reference:*  | 01 NCAC 05B .1401 - WAIVER OF COMPETITION POLICY 01 NCAC 05B .1402 APPROVAL AND DOCUMENTATION |
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| **SUBMITTING YOUR REQUEST** |
| After all required documentation is prepared and ready to be submitted, submit your request through the NC eProcurement Ariba Sourcing project or **through a PIP** [**Preliminary Review Request**](https://ncconnect.sharepoint.com/sites/pcagencyview/SitePages/eForms.aspx) (for non-Ariba agencies or Waivers only). Timeline for review/feedback or approval to post:* IFBs/RFQs 3-5 business days.
* RFPs 5-10 business days.

**ALL REQUIRED DOCUMENTATION MUST BE SUBMITTED WITH YOUR REQUEST OR YOUR REQUEST MAY BE RETURNED WITHOUT FURTHER ACTION.** |
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| **PROCUREMENT FILE NAMING CONVENTION** |
| **Please save all files in one folder in Ariba or attached to the PIP eForm using the following naming convention: Solicitation # - Agency - Solicitation Title - Process Type “Document” “Part”Example:** 13-XXXXXXXXX – DOA – Raleigh Janitorial Services – Bid Award Recommendation Memo13-XXXXXXXXX – DOA – Raleigh Janitorial Services – Bid Addendum 113-XXXXXXXXX – DOA – Raleigh Janitorial Services – Bid Opening Sheet13-XXXXXXXXX – DOA – Raleigh Janitorial Services – Bid Administrative Review13-XXXXXXXXX – DOA – Raleigh Janitorial Services – Bid Tabulation13-XXXXXXXXX – DOA – Raleigh Janitorial Services – Correspondence Lack of Competition Request13-XXXXXXXXX – DOA – Raleigh Janitorial Services – Correspondence HUB Efforts to HUB Office13-XXXXXXXXX – DOA – Raleigh Janitorial Services – IFB BAFO13-XXXXXXXXX – DOA – Raleigh Janitorial Services – IFB 13-XXXXXXXXX – DOA – Raleigh Janitorial Services – Response Vendor Name13-XXXXXXXXX – DOA – Raleigh Janitorial Services – Response Vendor Name Clarification 113-XXXXXXXXX – DOA – Raleigh Janitorial Services – Response Vendor Name BAFO |
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| **ADDITIONAL RESOURCES** |
| **General Statutes and NC Administrative Code References** |
| NC General Statutes | [Article 3 - Purchases and Contracts](https://www.ncleg.gov/EnactedLegislation/Statutes/PDF/ByArticle/Chapter_143/Article_3.pdf) |
| NC Administrative Code | [01 NCAC 05 - Purchase and Contract](http://reports.oah.state.nc.us/ncac/title%2001%20-%20administration/chapter%2005%20-%20purchase%20and%20contract/chapter%2005%20rules.pdf) |
| Procurement Information Portal | [Procurement Information Portal Link](https://ncconnect.sharepoint.com/sites/pcagencyview) |