

LAKE STEVENS SCHOOL DISTRICT
PIGGYBACKING CHECKLIST – FEDERAL
*Must complete **PRIOR** to any District commitment*

Name: _____ Date: _____
 Awarding Entity: _____ State Located: _____
 Purchasing Cooperative: _____
 Awarded Vendor: _____
 Contract No.: _____ Expires: _____
 Renewal No.: _____ Expires: _____
 Goods/Services Covered: _____

Required Relationship with Awarding Entity: *retain supporting documentation*

<input type="checkbox"/> Current Cooperative Membership Agreement and/or Expires: _____	<input type="checkbox"/> Current Interlocal Agreement Expires: _____
<input type="checkbox"/> Agreement contains the required contractual elements (RCW 39.34.030)	

Required Document Review: *retain supporting documentation* *notes:*

<input type="checkbox"/> Solicitation (RFB, RFP, RFQ) – plans and specs prepared	
<input type="checkbox"/> Advertisement/affidavit of publication/website	
<input type="checkbox"/> Vendor response to solicitation	
<input type="checkbox"/> Bid tabulation or summary of <u>all</u> bids received	
<input type="checkbox"/> Evaluation or scoring documents	
<input type="checkbox"/> Meeting minutes (<i>or other proof</i>) of governing body approval	
<input type="checkbox"/> Signed contract	

Required Piggybacking Checklist: *notes:*

<input type="checkbox"/> Procurement policy allows piggybacking	
<input type="checkbox"/> All other procurement options were evaluated and piggybacking was the best viable option	
<input type="checkbox"/> Awarding entity is a “Public Agency”	
<input type="checkbox"/> Awarding entity handled the procurement process itself	
<input type="checkbox"/> Awarding entity complied with the <u>most restrictive</u> of our local, state or federal procurement (Uniform Grant Guidance, 2 CFR Section 200.317 – 200.327) requirements	
<input type="checkbox"/> Advertised in a newspaper of general circulation for two consecutive weeks	
<input type="checkbox"/> Solicitation posted on a public agency, purchasing cooperative or similar service provider website or access link provided to the notice on the state’s web portal per RCW 39.34.030(5)(b)	

Required Piggybacking Checklist:

notes:

<input type="checkbox"/> Solicitation allows us to use it post-award (assignability clause)	
<input type="checkbox"/> A public bid opening was held on the date, time and place stated in the advertisement	
<input type="checkbox"/> A proper evaluation of the bids was performed – criteria match solicitation	
<input type="checkbox"/> Bid was awarded to the responsive and lowest responsible bidder (price was a factor)	
<input type="checkbox"/> Contract allows us to use it post-award (assignability clause)	
<input type="checkbox"/> Contract includes the goods/services sought – quality, specifications or deliverables meet expectations	
<input type="checkbox"/> Contract price is reasonable when compared to a cost or price analysis	
<input type="checkbox"/> Contract contains applicable provisions described in Uniform Grant Guidance, 2 CFR Section 200.327	
<input type="checkbox"/> Contract terms and conditions are acceptable	
<input type="checkbox"/> Contract hasn't expired and it is active for the period desired (including renewal options)	
<input type="checkbox"/> Complied with suspension and debarment requirements – conduct our own verification – options: 1. <i>www.SAM.gov vendor verification (print with date)</i> 2. <i>Clause in vendor signed contract or PO</i> 3. <i>Vendor signed Suspension & Debarment certification</i>	
<input type="checkbox"/> Any specific guidance from the federal agency was considered – including contacting the grantor	
<input type="checkbox"/> Quotes from awarded vendor reference contract information	
<input type="checkbox"/> Price and other elements monitored/matched to contract	

Terms:

Awarding Entity	Entity that directly awards the contract to the vendor
CFR	Code of Federal Regulations
Piggybacking	Relying on the bid awards of others
Public Agency	<i>(RCW 39.34.020) any agency, political subdivision, or unit of local government of this state including, but not limited to, municipal corporations, quasi municipal corporations, special-purpose districts, and local service districts; any agency of the state government; any agency of the United States; any Indian tribe recognized as such by the federal government; and any political subdivision of another state</i>
PO	Purchase Order
RFB	Request for Bid
RFP	Request for Proposal
RFQ	Request for Qualifications
SAM	System for Award Management

ATTACH COMPLETED CHECKLIST TO PURCHASE ORDER OR ORIGINAL ITEMIZED RECEIPT
RETAIN SUPPORTING DOCUMENTATION FOR AUDIT PURPOSES