

**DEPARTMENT PROCUREMENT READINESS CHECKLIST** (Can be a fillable PDF or put into something like Jotform)

*For Colleges & Universities (SLED Focus)*

**Department Information**

- **Department Name:** \_\_\_\_\_
- **Primary Contact:** \_\_\_\_\_
- **Email / Phone:** \_\_\_\_\_
- **Budget/Account Number:** \_\_\_\_\_
- **Planned Purchase Date:** \_\_\_\_\_
- **Funding Source (State / Grant / Other):** \_\_\_\_\_

**1. Purchase Clarity & Budget Readiness**

Check all that apply:

- The purchase need is clearly defined
- The purchase aligns with the department's approved budget
- Funding source is confirmed and allowable
- Estimated cost is known or can be reasonably projected
- The purchase is essential to operations, instruction, research, or compliance
- Spending thresholds and bidding requirements are understood

**Notes:**

**2. Vendor Requirements & Restrictions**

- Restricted vendor requirements have been reviewed
- Vendor approval status is known
- Required vendor documentation (W9, certifications, etc.) is available
- Diversity requirements (WBENC, WOSB, etc.) are understood
- New vendor onboarding rules are known

**Notes:**

### **3. Specialized Goods & Services**

- The item/service is standard
- The item/service is specialized or technical
- At least one potential source has been identified
- Special handling, installation, or delivery needs are known
- Specifications or scope of work are ready for quoting

**Notes:**

### **4. Quotes & Documentation Preparedness**

- Required number of quotes is known
- Specifications or scope of work are clearly written
- Quotes include shipping, installation, and additional fees
- Quotes include required compliance language
- Justification is available if only one vendor can supply the item

**Notes:**

### **5. Workflow & Approval Readiness**

- Approval steps are understood
- Required approvers are identified
- Timeline aligns with departmental needs
- Potential delays (bidding, compliance, vendor restrictions) are considered
- Backup plan exists if preferred vendor cannot be used

**Notes:**

## 6. Delivery, Logistics & PostPurchase Needs

- Delivery location is confirmed
- Space, storage, or installation needs are identified
- IT, facilities, or other support teams have been notified
- Delivery receipt and verification responsibilities are assigned
- Warranty, service, or maintenance requirements are understood

**Notes:**

### Procurement Readiness Scorecard

Rate each category from **1 to 5** (1 = Not Ready, 5 = Fully Ready)

<b>Category</b>	<b>Score (1–5)</b>
Purchase Clarity & Budget	_____
Vendor Requirements	_____
Specialized Sourcing	_____
Quotes & Documentation	_____
Workflow & Approvals	_____
Delivery & Logistics	_____

**Total Score:** \_\_\_\_\_ / 30

### Score Interpretation

- **26–30:** Fully Ready
- **20–25:** Mostly Ready
- **15–19:** Needs Preparation
- **Below 15:** High Risk of Delay