

**PROCUREMENT RESEARCH/CONTACT WORKSHEET**

Procurement No. \_\_\_\_\_

(Use to determine procurement alternatives and if specifications and other requirements are reasonable.)

GOOD/SERVICE: \_\_\_\_\_

1. What is the funding availability and restrictions?

\_\_\_\_\_  
\_\_\_\_\_

2. Would consolidation with another procurement be more economical?  YES  NO

If yes, name other procurement; sign and date this worksheet. Use a new worksheet for the new procurement.

Other procurement: \_\_\_\_\_

3. Would separation into smaller procurements be more economical?  YES  NO

If yes, describe how procurements will be accomplished. Continue with this form.

\_\_\_\_\_

4. Would a lease be more economical?  YES  NO

If yes, the procurement must comply with the same requirements as a purchase. Continue with this form.

5. Were Federal, state, county, city, schools or other SDA agencies checked for contracts that could be used for this procurement?  YES  NO

If yes, list each government agency checked and the results:

AGENCY

RESULTS

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. Will this procurement result in duplication of facilities available through Federal, state, county, city, schools or other SDA agencies?  YES  NO

If yes, and the procurement will be canceled, sign and date this worksheet and do not continue with this form.

If yes, and the decision is to continue with the procurement, indicate how the JTPA-funded alternative would be more effective or more likely to achieve performance goals.

\_\_\_\_\_  
\_\_\_\_\_

7. Will this procurement result in duplication of services available through Federal, state, county or city agencies?  YES  NO

If yes, and the decision is to cancel the procurement, sign and date this worksheet and do not continue with this form for this procurement.

If yes, and the decision is to continue with the procurement, indicate how the JTPA-funded alternative would be more effective or more likely to achieve performance goals.

\_\_\_\_\_  
\_\_\_\_\_

**PROCUREMENT RESEARCH/CONTACT WORKSHEET**

Procurement No. \_\_\_\_\_

GOOD/SERVICE: \_\_\_\_\_ QUANTITY: \_\_\_\_\_

INFORMATION REQUESTED: \_\_\_\_\_

**1. COMPANY CONTACTED:** \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_ PHONE: \_\_\_\_\_

TITLE: \_\_\_\_\_ CONTACT DATES: \_\_\_\_\_

DISCUSSION/RESULTS: \_\_\_\_\_

Warranty:  30 days  60 days  90 days  1 Year  More Delivery Time: \_\_\_\_\_

Service Agreement:  YES  NO \$ \_\_\_\_\_ Shipping:  YES  NO \$ \_\_\_\_\_

Assembly?:  YES  NO COST \$ \_\_\_\_\_ Installation?  YES  NO COST \$ \_\_\_\_\_

TOTAL COST: \$ \_\_\_\_\_ DISCOUNTS? \_\_\_\_\_

**2. COMPANY CONTACTED:** \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_ PHONE: \_\_\_\_\_

TITLE: \_\_\_\_\_ CONTACT DATES: \_\_\_\_\_

DISCUSSION/RESULTS: \_\_\_\_\_

Warranty:  30 days  60 days  90 days  1 Year  More Delivery Time: \_\_\_\_\_

Service Agreement:  YES  NO \$ \_\_\_\_\_ Shipping:  YES  NO \$ \_\_\_\_\_

Assembly?:  YES  NO COST \$ \_\_\_\_\_ Installation?  YES  NO COST \$ \_\_\_\_\_

TOTAL COST: \$ \_\_\_\_\_ DISCOUNTS? \_\_\_\_\_

**3. COMPANY CONTACTED:** \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_ PHONE: \_\_\_\_\_

TITLE: \_\_\_\_\_ CONTACT DATES: \_\_\_\_\_

DISCUSSION/RESULTS: \_\_\_\_\_

Warranty:  30 days  60 days  90 days  1 Year  More Delivery Time: \_\_\_\_\_

Service Agreement:  YES  NO \$ \_\_\_\_\_ Shipping:  YES  NO \$ \_\_\_\_\_

Assembly?:  YES  NO COST \$ \_\_\_\_\_ Installation?  YES  NO COST \$ \_\_\_\_\_

TOTAL COST: \$ \_\_\_\_\_ DISCOUNTS? \_\_\_\_\_

VENDOR SELECTED: \_\_\_\_\_

REASON FOR SELECTION: \_\_\_\_\_

DATE ORDER PLACED: \_\_\_\_\_ EXPECTED DELIVERY: \_\_\_\_\_

PREPARED BY: \_\_\_\_\_ DATE: \_\_\_\_\_