

## Procurement Scope Checklist

The scope of an award is the contract requirements agreed upon prior to the official signing and award. Consider the following to ensure your contract includes all terms and conditions you require for doing business with any vendor.

- ☐ Contract duration – how long is the contract binding?
- ☐ Contract renewal options – are there opportunities for extensions of the contract? What time period: 1, 2, 3 (or more) additional years? Are there opportunities or provisions for price changes?
- ☐ Identification of the contractors – who is this contract awarded to? Are subcontractors allowed?
- ☐ Scope of the work – What tasks or services are to be performed? Give a detailed description. How long should it take? Outline number of hours or timeframe for completion of work (for example, deliveries must be made after 6:00 am and before 2:30 pm). Consider delivery expectations in event of holidays, school closure or inclement weather. Have you described performance expectations, including level of performance and required outcomes?
- ☐ Product or service specifications, including what, when, where and how.
- ☐ Type of Contract – for example, is it fixed price or cost reimbursable with fixed fee
- ☐ Payment – for example, terms or pricing inclusive of supplier paid shipping costs.
- ☐ Contract modifications – can changes be made? What is the process?
- ☐ Default and breach of contract – process, procedures, remedies, penalties, cancellation
- ☐ Compliance certifications – Are all requirements stated? Is non-compliance or non-conformity addressed?
- ☐ Contract termination – Your rights to terminate the contract for convenience/cause
- ☐ Recordkeeping requirements – What is the format? What are the time requirements: weekly? monthly?
- ☐ Terms and conditions of the contract – What laws, provisions or regulations must be adhered to? For example, the Buy American Provision for food products.
- ☐ Applicable credits, rebates or discount requirements and tracking documentation
- ☐ Sanitation/HACCP requirements – are certain certifications or licenses required?
- ☐ Professional licenses or certification requirements – are minimum levels of education required? Is certain experience required?
- ☐ State or local law requirements for personnel – is background screening for vendors or non-instructional personnel required, such as under Florida's Jessica Lunsford Act?