

Assignment Evaluation Checklist

Section I - Basic Information (this section to be completed by university staff)

Assignment of the financial interest and delegation of the obligations and duties in a State awarded contract is a limitation on the State's goal to award contracts to the lowest responsible and responsive bidder using competitive sealed bidding. The assignee did not go through the bid process, but is now the beneficiary of a State contract.

Contract Number: _____ University Name: _____

SPO: _____ University Point of Contact: _____

Assignor: _____ Assignee: _____

Section II - Background (this section to be completed by university staff)

The State Purchasing Officer (SPO) must evaluate the proposed assignment and determine if approving it is in the State's best interest (44 ILAC §1.2005(o)). The university must complete the 7 checklist items below to help the SPO in this determination.

Due diligence should be taken to ensure that the assignment does not pose any threat to the commercially reasonable expectations of the State. Duties requiring specialized skills or based on the unique characteristics of the original vendor cannot be delegated.

1. What is being assigned?

2. Why is the assignment being made? Explain, and attach additional documentation if necessary:

3. Does the Assignee meet all requirements to contract with the State?

3a. Is the Assignee BEP and/or VOSB/SDVOSB certified?

4. Will the Assignee use subcontractors?

4a. If yes, provide the name(s) of all subcontractors (attach additional documentation if necessary):

4b. If the Assignee will use subcontractors, identify any subcontractors that are BEP and/or VOSB/SDVOSB certified. List both the subcontractor name and any certification(s). Attach additional documentation if necessary:

5. If the Assignee will use subcontractors, do the subcontractors meet all requirements to contract with the State?

6. Was the contract originally awarded based on the contractor's unique characteristics that cannot be delegated?

6b. If unique characteristics were part of the original contract award, provide those (attach additional documentation if necessary):

7. Does the university agree that the Assignee possesses the skills necessary to fulfill the performance obligations?

Fiscal Department documents provided?

Legal review completed?

Section III - Approval

University

University Purchasing Director Signature

University Purchasing Dir. Printed Name

Date

State Purchasing Officer

Accept Assignment

Reject Assignment

Other (please explain below)

Comments:

State Purchasing Officer Signature

State Purchasing Officer Printed Name

Date