

CSR Checklist for Requesting Agency:

Applicable Form:

Attach form when the following criteria applicable

<input type="checkbox"/>	QUOTE	Needed with all CSR's unless an RFP will be done
<input type="checkbox"/>	Statement or Scope of Work	SOW – Written document for Services, Goods Needing to be purchased along with future plans
<input type="checkbox"/>	Request for Legal Assistance	RLA - PROJECT \geq \$100k
<input type="checkbox"/>	nextSource Work Order Contract	Draft needs to be submitted with CSR
<input type="checkbox"/>	Draft of RFP, ITB, Proposal	Needed when a new Contract is requested.
<input type="checkbox"/>	Information Resources Request	IRR – IT – PROJECT ONLY \geq \$75K for the life of The Contract
<input type="checkbox"/>	Feasibility Study	\geq \$30K for Personal Services Contracts (PSK's) Instructions attached -
<input type="checkbox"/>	Brand Name Justification	Specific Brand needs to be used in order to be Compatible with the product being requested
<input type="checkbox"/>		
<input type="checkbox"/>	Sole Source Justification	The Vendor is the only one that can supply that Maintenance.
<input type="checkbox"/>		
<input type="checkbox"/>		

Attached Pages further define the keywords above and also supply a copy of the forms.

Keyword Definitions

Quote:

Attach the quote when there is a request for purchasing items, renewing maintenance.

Statement of Work (SOW):

Statement of Work describes what the request for services, goods, maintenance and detail to support the request and future plans of the requesting Agency.

Request for Legal Assistance (RLA):

Request for Legal Assistance is submitted for projects exceeding \$100,000.00 threshold, excluding price agreements.

nextSource Work Order Contract (WOC):

This is a WOC that is either deliverables or project based. There is a SOW that is contained in this Contract which will need to be added, but attached is the copy of the Contract to "drop" the requesting information into the supplied Template.

Draft of RFP, ITB, Proposal:

This might be attached to a CSR to help DAS Contract Services with something done prior or a similar example. This could potentially speed the process up also.

Information Resources Request (IRR):

Information Resources Request submitted to and approved by EISPD/ITIP for IT-related projects \$75,000.00 and over.

Feasibility Study:

This Study is necessary for Personal Services Contracts (PSK)'s \$30,000.00 and over.

Go to the following website for more instructions:

<http://www.das.state.or.us/DAS/HR/docs/lr/SEIUFeasibilityForm0709rev51208>

Brand Name Justification: Begin by writing/drafting the document

This is if a certain brand is needed in order to have the product or maintenance compatible with the request.

This document is not on ORPIN, but the Contract Services Unit will be able to send you a document if needed.

Sole Source Justification: Begin by writing/drafting the document

Drafted document needs to be submitted when the Agency believes that only one provider/vendor can supply the product or maintenance. To find the document to be drafted, follow below instructions:

Find the SPO-Approved Template by:

Log into ORPIN – website:

<https://orpin.oregon.gov/open.dll/login?sessionID=2130265&Language=En&cssStyle=&fromEmail=>

Once logged in ~

On the main screen you should find this option to click on:

Templates: [Link to templates page](#)

Choose Sole Source Request