

Lake County Administrative Office
Solicitation Number Checklist



| Dollar Amount | Quotes or Bids | Purchase Order or Contract | Minimum Signing Authority |
|--|--|---|----------------------------------|
| Up to \$5,000 | No Quotes Required | Not Required | Department Head |
| FOR THE FOLLOWING AMOUNTS, PLEASE USE THE CHECKLIST | | | |
| \$5,000+ to \$50,000 | Request and Document a minimum of 3 price comparisons | Written Purchase Order or Contract approved by County Counsel | Department Head |
| \$50,000+ to \$100,000 | Request and Document a minimum of 5 Sealed Bids or RFP | Written Purchase Order or Contract approved by County Counsel | Department Head |
| \$100,000+ | Request and Document a minimum of 5 Sealed Bids or RFP | Written Purchase Order or Contract approved by County Counsel | Board Chairman, unless delegated |

STEP ONE: Department Requests Solicitation Number

(Send Checklist to Admin via Interoffice mail or to LakeCountyPurchasingAgent@lakecountyca.gov)

Department: _____ Fund: _____ Budget Unit: _____

Project Name/Description: _____

Exemption Code: _____ *(Attach reasoning for this exemption)*

Contact Name: _____ Email: _____

STEP TWO: Admin Assigns Solicitation Number

(Administrative Office assigns and returns to Department)

Assigned Solicitation Number: _____

STEP THREE: Administration Office Review

(Department submits documents to Administration Office)

Date Received by Admin: _____ Appropriate documentation received

Exemption Approved? YES NO Documented Attempts/Responses Attached? YES NO

Admin Changes Requested? NO YES Date Returned to Dept: _____

Notes: _____

Date re-submitted to Admin: _____ Appropriate documentation received

Admin Approval (Name / Date): Casey Moreno

STEP FOUR: Department Next Steps

(Department to complete, keep Checklist with final documents as they are routed)

County Counsel Approval (if not on contract) Signature: _____

To Auditor (copy of final documents, including Checklist)