

Appendix A: Collaborative Procurement Checklist

The detailed checklist below provides an easy step-by-step resource for governments to create a collaborative and outcomes-focused procurement process. This list incorporates information from the Request for Information (RFI) Guide, recommendations from the [What Works Toolkit: A State and Local Government Policymaker's Guide to Improving Human Services Contracting and Outcomes](#), and other common sense steps necessary to bring a collaborative lens to procurement. While this list is designed as a checklist for governments, it can also offer human services providers insight into the process that government will follow and allows providers to identify where and how they can participate (as identified by ** in the list below).

COLLABORATIVE PROCUREMENT CHECKLIST FOR GOVERNMENTS

- ☐ Review the list of the most important contracting opportunities coming up in the next year.
- ☐ Use the Collaborative Procurement Questions to identify goals for upcoming procurements, including gathering any data you have to date on current services and community need. ** (Human services providers may be able to supply information and data on current services.)
- ☐ Identify key internal and external partners.
- ☐ Hold a pre-RFI conversation with human services providers and other community stakeholders to identify high level outcome goals and map existing community resources.**
- ☐ Create a draft RFI that incorporates information gathered through the use of the Collaborative Procurement Questions as well as feedback from human services providers and community stakeholders.
- ☐ Review a draft RFI with your organization's internal stakeholders:
 - ☐ Share the goals of the discussion and ask them for any necessary parameters or administration procedures relevant to the discussion.
 - ☐ Share examples of RFIs from other governments.
- ☐ Release an RFI.

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- ☐ Invite participants to provide written or verbal feedback on the RFI.**
For verbal feedback received at a meeting, consider the following items for a meeting agenda:
 - ☐ Introduce yourself and your reason for inviting them to participate.
 - ☐ Share philosophy of collaboration.
 - ☐ Outline length and expectations of the meeting.
 - ☐ Establish that participating in this conversation does not preclude you from participating in the procurement.
 - ☐ Ensure that participants know that there are no wrong answers and that you are looking for honest and open feedback.
 - ☐ Use the Collaborative Procurement Questions to gather feedback on the RFI.
- ☐ Incorporate feedback and insights from human services providers into an RFP.
- ☐ Issue an RFP.
- ☐ Hold pre-proposal meetings including community information sessions and/or webinars to answer questions about the RFP; publicly post answers to all questions received.
- ☐ Receive RFP proposals from human services providers.**
- ☐ Review proposals and select human services provider(s) (with input from a community review panel representing the target populations).
- ☐ Negotiate a service contract with human services provider(s).**
- ☐ Award contract(s) to selected human services provider(s).**
- ☐ Meet frequently with the selected human services provider(s) to identify progress, make necessary course corrections, review outcomes, and discuss evaluation results. Where applicable, create opportunities for shared learning between human services providers working towards similar outcome goals.**