

## **Request for Approval of an Option to Renew Checklist**

### **I. Contract Renewal Option Submission Package (items must be provided with the agenda by the DBM submission cut-off date):**

1. Copy of the page(s) from the contract containing the option language.
2. Copy of either:
  - a. The notification to the contractor of the Agency's intent to exercise the renewal, contingent upon DBM/BPW approval. (Preferred)
  - b. The proposed notification to the contractor that the renewal option is being exercised. (This should be a draft only. This notification should not actually be sent until DBM/BPW approval has/have been obtained.)
3. Properly executed Contract BPO entered into ADPICS with correct approval paths (\*includes BPW approval, Department D05, if applicable) and including all Crosswalk information and MBE screen (PHCL 2345) filled in.
4. A statement explaining why the renewal option is recommended in lieu of a new procurement to obtain better pricing through competition. Justify why it is in the State's best interest to exercise the option in terms of quality of service, good pricing or any other applicable factor.

***Also, as applicable:***

5. The justification for any retroactive request, signed by the Agency Head (this will be provided as backup to the BPW item). (All retroactive actions require BPW approval.)
6. If the option being exercised is the last renewal option on the contract and the service or information technology (IT) activity is still needed, submit a plan for re-procuring with a timeline.
7. If a name change, assignment or novation has occurred, provide a copy of the name change modification or the novation agreement/modification that transfers the contract to a successor.
8. If the original contract contains an MBE participation goal, provide a document showing the goal and as of the submission of the request for approval of the renewal:
  - a. The total payments made to the contractor(s),
  - b. The total payments made to the MBE subcontractor(s), and
  - c. The percentage of the payments made to the subcontractor(s) compared to the payments made to the contractor(s).

## **II. Agenda Item for Option to Renew\*:**

Send electronic version of Agenda in MS Word via e-mail to your agency's assigned DBM Procurement Analyst and a copy to Jamie Tomaszewski ([JTomasze@dbm.state.md.us](mailto:JTomasze@dbm.state.md.us)), Deborah Owens ([dowens@dbm.state.md.us](mailto:dowens@dbm.state.md.us)) and Terrie DeLuca ([tdeluca@dbm.state.md.us](mailto:tdeluca@dbm.state.md.us)).

The subject line of the email must state: Agency ID and Contract Name and/or ID. The format and order of the Agenda Item must follow BPW Advisory 2006-1. All information must be accurate and complete.

See "DBM BPW Agenda Item Formats and Instructions" and "DBM BPW Agenda Item Templates".

Note: Although this guideline provides information to be submitted for items requiring BPW approval, except for the items with asterisks, the same information should be submitted for items within DBM's approval authority (non-BPW items).