

CHECKLIST USED BY GG PROCUREMENT OFFICE FOR FORMAL PROCUREMENT PROCESS

Glossary

Procurement Acronyms:

BEB = Best Evaluated Bid
 ITB = Invitation to Bid
 RFP = Request for Proposal
 RFQ = Request for Qualifications
 ITN = Invitation to Negotiate

Office of Equal Opportunity Acronyms:

SBE = Small Business Enterprise
 MBE = Minority Business Enterprise
 WBE = Women Business Enterprise
 SDVBE = Service-Disabled Veteran Business Enterprise
 SBPP = Small and Service-Disabled Veteran Business Program

BID DOCUMENT (ITB, BEB, RFP, RFQ)

- Draft Bid Document (determined how many copies required)
- Check EO SBE Directory (B2GNow) for vendors if department didn't
- Advertising required (?) – notify provider as necessary
- Locate/calendar meeting room(s) (pre-bid, dist., evaluation, orals)
- Calendar meetings for evaluators (pre-bid, dist., evaluation, orals)
- Convert bid to Adobe PDF document
- Make 3 CD's for office distribution (complete pickup slip for each)
- Upload final bid document (also plans & specs) to DemandStar
- Print (and PDF) DemandStar legal ad for posting on board
- Email PDF Dept Info Form/Tech Specs to Equal Opportunity (SBPP)
- Email final bid document (also plans & specs) to department
- Cone of Silence (a.k.a. Blackout) language is included in email to department (final bid)
- Save Bid Document to Bids folder on network shared drive (V-drive) - log #, dept, title, ect.
- Print 2 final bid documents (1 Master File; 1 Contract folder [City])
- Prepare Cover Pages

BEGIN BID RECORD SPREADSHEET

- Create electronic Bid Record (title: Bid Record-Bid Name, Bid #)
- Add Tab: Supplemental Vendor (include Department & DemandStar)
- Add Tab: Broadcast (include DemandStar broadcast list)
- Add Tab: Addendum(s) (include DemandStar notification list)
- Add Tab: Plans Holder (include Plans Holders day of bid opening)

PRE-BID (date should have been calendared at bid distribution):

- Prepare Pre-Bid Sign-In Sheet
- Prepare Pre-Bid Checklist (stress blackout, mandatory, due date)
- Gather Cone of Silence (Blackout) sheet for handout
- Take detailed notes at pre-bid meeting
- Take Master bid to address bid document questions (not specs)
- Scan Pre-Bid Sign-In Sheet and upload to DemandStar

AFTER PRE-BID and/or ADDENDUM PREPARATION:

- Prepare Addendum (pre-bid and/or emailed bidder questions)
- Include Cone of Silence language as attachment
- Scan Pre-Bid Sign-in Sheet and include as attachment
- Convert Addendum to PDF (including Cone of Silence & pre-bid sign-in)
- IMPORTANT: Update cd's at front desk with addendum

- Upload Addendum to DemandStar
- Email final Addendum to department
- Cone of Silence language is included in email to department (final)
- Save Addendum to Bids folder on V drive

BID OPENING PREPARATION:

- Provide front desk with mandatory pre-bid sign-in (if applicable)
- Complete electronic Bid Record Form w/statistical info
- Download Plans Holder list from DemandStar to spreadsheet

BID OPENING:

- Complete all fields of bid form (signature, conflict, distribute, etc.)
- Scan Bid Record (original immediately to front desk),
- Add scanned Bid Record to electronic Bid Record (separate tab)
- Upload completed Bid Record to DemandStar
- Email Bid Record to Department (Project Manager)
- Review bid for Trade Secret; Confidential; Proprietary
- Email bid responses to Department (Project Manager)
- Recommendation of Intended Award form (if no evaluation process)

EVALUATION PROCESS (Distribution of Evaluator packets):

- * Documents to be included in Evaluator packets, both hard copy and CD (electronic)
- Electronic Evaluation Form (Evaluator Forms) *
- Evaluator Checklist for Buyer (not included in Evaluators packets)
- Disclosure Statement (type with evaluator name and number)
- Evaluator Guidelines* (Do's and Don'ts)
- Professional Services Evaluation Handbook*
- Evaluator Minimum Requirements listing*
- Bid (ITB, BEB, RFP, RFQ) and Addenda issued*
- Submittals* (copies only, original to be retained in file)
- Bid Record
- Reference Check Forms samples*

EVALUATOR DISCUSSION (Written and Technical)

- Discussions are recorded for public record
- Projector can be used for overhead Evaluator recap (reserve)
- Collect Evaluator worksheets (not tablets or legal pads notes)
- Buyer Evaluation Summary of Evaluator worksheets (include points for local preference/small or service-disabled veterans' business enterprise, if applicable)

EVALUATOR DISCUSSION (Written and Technical) - continued

- Recommendation of Intended Award form (have completed),
If no Oral Presentations
- Discussion-Time allowed for presentations. Questions for
presenters for the orals

ORAL PRESENTATIONS

- Obtain topics or questions Evaluators want to see in orals
- Notify bidders (applicable letter) of oral date/time & topics
- Prepare Oral Presentation sign-in sheet for each presenter
- Reserve equipment, if required
- Presentations are recorded for public record
- Record each presenter, with discussions, separately
- Buyer Evaluation Summary of Evaluator worksheets
- Recommendation of Intended Award form (have completed)

AWARD:

- Completed Recommendation of Intended award received
- Write Award Recommendation Letters (scan signed letters for
electronic files and awardee copy for contract folder)
- Email letter to bidder (high importance, read/delivery receipt
w/confirmation language)
- Prepare Award Public Notice, save as PDF (upload to DemandStar)
- Award Public Notice printed: contract file & board
- CC Item Bid Tabulation if applicable (upload to CC folder w/others)
- Update DemandStar with award information (Vendor and Award
Public Notice)