

Solicitation and BID Opening Checklist – Competitive Solicitation Required

The solicitation and BID Opening phase encompasses the Advertising, Opening, Review, Analysis, and the Selection processes of procurement. Detailed and comprehensive execution of this phase can help avoid conflicts that could result in delay or possibly even a re-bid of the entire project.

Opportunity for clarification of Solicitation Documents may be necessary. A process to address any potential questions should be offered well in advance of the submission deadline.

Examination of all proposals received for responsiveness to all corresponding instructions, forms, terms and specifications contained in the solicitation is necessary to provide a proper evaluation. Failure to do so may affect the evaluation of the Bid.

The Checklist below is intended to offer guidance through the opening and review phase if a solicitation/bid was performed utilizing federal funding, it does not constitute full compliance. State and local procurement guidelines may supersede federal practices and should be reviewed for further compliance requirements.

Solicitation and Bid Opening – If a solicitation or bid was performed below are some standard processes that accompany the advertisement, opening, and justification for award phase of a federal procurement. The following list is for reference purposes only for comparison, and may be superseded by more strict state and/or local requirements.	Check If Provided
Solicitation/Bid Advertisement – All project activities must be advertised without geographic preference, (except in A/E under certain circumstances, preference for hiring veterans on transit construction projects and geographic-based hiring preferences as proposes to be amended in 2 CFR Part 1201).	
Approved Equals Process - As needed provide for an Approved Equals request process and allow time for timely response in a transparent manner.	
Pre-Bid Meeting – If necessary plan a Pre-Bid meeting to address any questions well in advance of bid opening, to allow potential bidders appropriate time to prepare their proposals. All responses to questions should be in an open and transparent manner to all potential bidders.	
Solicitation/Bid Opening and Recording – Record opening date, time, and participants.	
Solicitation/Bid Review and Evaluation – Record review process, those on the selection committee, and evaluation and/or scoring criteria used in the review.	
Solicitation/Bid Tabulation - Prepare a Bid Tabulation of all bidders for a side by side analysis of their scoring, responsibility determination, reason and justification for selection, and reason for any disqualifications.	
Cost or Price Analysis – Used to determine there was adequate competition, and analysis of selected cost elements. For further guidance on the performance of Cost or Price Analysis please see current Federal Circular 4220 Chapter VI.	
Excluded Parties List (EPL) - The EPL includes information regarding entities debarred, suspended, proposed for debarment, excluded or disqualified, or otherwise declared ineligible from receiving Federal contracts, certain subcontracts, and certain Federal assistance and benefits. Prior to award the proposed vendor should be researched and printed on the EPL to assure they are not ineligible. Perform search here https://sam.gov/	
TVM Certification - Review FTA's TVM website (https://www.transit.dot.gov/regulations-and-guidance/civil-rights-ada/eligible-tvms-list) prior to bid award to verify TVM Certification. Include a print out of the web page with bid documentation.	
Award Selection and Justification – A write-up on the chosen award selection, reasoning behind the selection including results of reference checks, presentation results, firm qualifications, WBE and or DBE qualifications, scoring results, and any additional criteria used in the determination.	
Draft Contract – Prepare a Draft Contract for review by all parties involved.	
File Retention - is an important part of the federal procurement process. Building and retaining a comprehensive project procurement history file for future use is essential in situations of protest, conflict, and federal review processes.	Check If Complete
<i>All files have been retained</i>	
Approval to Proceed – As required (retain a copy for files)	Check If Approved
<i>Received</i>	

THIS FORM IS INFORMATIONAL ONLY AND IS NOT TO BE CONSTRUED AS LEGAL ADVICE, NOR IS IT INCLUSIVE OF EVERY DETAIL THAT MAY BE INVOLVED IN THE HANDLING OF INDIVIDUAL PROCUREMENT MATTERS. IT IS RECOMMENDED THAT INDEPENDENT RESEARCH BE CONDUCTED AND ALL DOCUMENTATION CAREFULLY PROOFREAD IN EVERY PROCUREMENT MATTER.

**Upon Completion and Approval of the
“Solicitation and Bid Opening Phase”
You may proceed to the “Project Award and Contract Administration” Phase**