GOVERNMENT SUPPORT SERVICES (GSS)

CONTRACT BID PROCESS CHECKLIST (NON-PUBLIC WORKS)

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| Contract Number: |  |
| Contract Name: |  |
| Contract Period: |  |
| Contract Officer Assigned: |  |
| Contract Description or Need: |  |

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| **1.** | **Benchmark**: Pricing, Scope of Work and User Group Analysis.  *\*(Attach UG list)* |  |  |
| **2.** | Determine Action to be taken  *\*If extension, go to Appendix A*  *\*If expire, attach Management approval and prepare for archive.* | Date: | bid/rebid  extend  expire |

BID/RE-BID

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| **3.** | **Policy Impact**: Based on Contract Description, does this Contract **impact ANY of the following Departments, Guidelines or Policies?** (check all the apply) | Date: | *SCPO Resources > Contract Folder Standard*  *Copy for proper folder set-up* |
| **NON-TECHNOLOGY**  ACA – Affordable Care Act (only for Temporary Employment Contracts and/or Contract Personnel)  [ARCHITECTURE & ENGINEERING](http://www.gss.omb.delaware.gov/contracting/documents/agencyboilers/architecture-and-engineering.pdf)  [AUDIT](http://gss.omb.delaware.gov/contracting/documents/agencyboilers/audit_services.pdf)  BDPA – Enterprise Wide or Strategic Agency Solicitations with Expenses that may Affect Budgets  [LEGAL](http://gss.omb.delaware.gov/contracting/documents/agencyboilers/legal_services.pdf)  1075  Wage Determination  **TECHNOLOGY**  [DTI](http://gss.omb.delaware.gov/contracting/documents/agencyboilers/technology.doc) – Technology Related – Requires Terms and Conditions, Data Confidentiality and a Business Case (BC)   * Has the initial BC been approved?  NO  YES **File Copy** * Cyber Liability Insurance  NO  YES * Is BC waived or DTI oversight not required?  NO  YES **File Copy** * PHRST – Protected Health or PII transmitted  NO  YES **BAA Required**   and/or stored by Vendor | | | |
| **4.** | **Solicitation Type**: Determine the Most Appropriate Contracting Process | Date: |  |
| ITB - Invitation to Bid (§ [6923](http://delcode.delaware.gov/title29/c069/sc03/index.shtml)) (materiel or non-professional services)  *ITB TIMELINE by DE Code – 30 DAYS FROM BID CLOSING TO AWARD DECISION*  RFP - Request for Proposal (§ [6924](http://delcode.delaware.gov/title29/c069/sc03/index.shtml)) (materiel or non-professional services)  *RFP TIMELINE by DE Code – 90 DAYS FROM BID CLOSING TO AWARD DECISION*  Professional Services RFP (§ [6981](http://delcode.delaware.gov/title29/c069/sc06/index.shtml)) | | | |

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| **5.** | **User Group Interaction**: Scope Development, Scoring Criteria, Outreach Requests |  |  |
| 1. Draft solicitation, Tutorial & Responsibilities to UG. | Date: | Feedback Due: |
| 1. Round 2 review | Date: \_\_\_\_\_\_\_\_\_\_ | Feedback Due:  \_\_\_\_\_\_\_\_\_\_ |
| 1. Final review | Date: \_\_\_\_\_\_\_\_\_\_ | Feedback Due:  \_\_\_\_\_\_\_\_\_\_ |
| **6.** | **Bid/Performance Bond** | Date: | Required  Waived |
| **7.** | **Outreach**  (current vendors, previous bidders, OSD, SBA, GSA etc… Use benchmark workbook to log)  (Pull and Send) | Date: | **CODES**  UNSPSC:  NAICS:  GSA: |
| **8.** | **Posting Review** | Date: \_\_\_\_\_\_\_\_\_\_  Date:  \_\_\_\_\_\_\_\_\_\_ | Supervisor Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Administrator Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **9.** | **Posting Request**:  Complete Solicitation Request form and send with electronic copy of bid to Contracting Mailbox. 10 day lead time. | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Live on MMP   *(verify day of, print proof for contract file)* | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Pre-Bid Meeting?   *\*book room and buddy for scribing.* | NO  YES | Date: \_\_\_\_\_\_\_\_\_\_  post pre-bid attendee list **AND DISCUSSION SUMMARY** |
| 1. Q&A Period | NO  YES | Questions Due: \_\_\_\_\_\_\_\_\_\_  Addendum Posted: \_\_\_\_\_\_\_\_\_\_ |
| 1. Bid Opening | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Bid Register prepped (Bid room) | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Scheduling   *(room, witness, Contracting calendar)* | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| **10.** | **Bid Opening** | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Proposals rec’d list posted   (copy Admin) | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. # of bids rec’d | \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Cancellation (if appropriate)   *\*Send request, with cancellation reason to Contracting mailbox moving to No Award.* (Skip to #15 Admin Summary/Tasks) | Date: \_\_\_\_\_\_\_\_\_\_ | Supervisor Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

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| **11.** | **Initial review.** |  |  |
| 1. Exceptions | NO  YES |  |
| 1. Minor Deficiencies | NO  YES | To Vendor(s): \_\_\_\_\_\_\_\_\_\_  Return by: \_\_\_\_\_\_\_\_\_\_ |
| 1. Non-Responsive   *\*Letters to vendor, upon determination (exception for PS)* | NO  YES | To Vendor(s): \_\_\_\_\_\_\_\_\_\_ |
| 1. IT or Tech Solution?   *\*Engage DTI for applicable T&Cs* | NO  YES |  |
| 1. Check Federal Excluded Party List | CLEAN  ISSUE | *If Issue, requires DAG involvement.* |
| 1. Supervisor review | Date: \_\_\_\_\_\_\_\_\_\_ | Supervisor Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **12.** | **Bid/Proposal Evaluations. (ITB)** |  |  |
| 1. Price Evaluation | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Update Benchmark | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Negotiate Exceptions | Date: \_\_\_\_\_\_\_\_\_\_ | Return by: \_\_\_\_\_\_\_\_\_\_ |
| 1. Check References, if applicable | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Usage Report Review   *\*(N/A for New contracts)* | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Award Recommendation to UG | Date: \_\_\_\_\_\_\_\_\_\_ | Return by: \_\_\_\_\_\_\_\_\_\_ |
| 1. Bid Tab and Award Review and Approval | Date: \_\_\_\_\_\_\_\_\_\_  Date:  \_\_\_\_\_\_\_\_\_\_  Date:  \_\_\_\_\_\_\_\_\_\_ | Supervisor Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Administrator Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Deputy Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **12.** | **Bid/Proposal Evaluations. (RFP/PS)** |  |  |
| 1. Prepare Evaluation Packets for UG   *\*(eval sheets, proposals w/pricing removed, UG instructions)* | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Packets to UG | Date: \_\_\_\_\_\_\_\_\_\_ | Return by: \_\_\_\_\_\_\_\_\_\_ |
| 1. Price Evaluation | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Exceptions to…   *(DAG, ICO, UG, etc.)* | DAG: \_\_\_\_\_\_\_\_\_\_ Return by: \_\_\_\_\_\_\_\_\_\_  ICO: \_\_\_\_\_\_\_\_\_\_ Return by: \_\_\_\_\_\_\_\_\_\_  UG: \_\_\_\_\_\_\_\_\_\_ Return by: \_\_\_\_\_\_\_\_\_\_  Vendor: \_\_\_\_\_\_\_\_\_\_ Return by: \_\_\_\_\_\_\_\_\_\_ | |
| 1. Policy Impact | Date: \_\_\_\_\_\_\_\_\_\_ | Return by: \_\_\_\_\_\_\_\_\_\_ |
| **Bid/Proposal Evaluations. (RFP/PS) …** | | |
| 1. References | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Compile Score Sheets | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Best & Final | Date: \_\_\_\_\_\_\_\_\_\_ | Return by: \_\_\_\_\_\_\_\_\_\_ |
| 1. Update Benchmark | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Usage Report Review | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Award Recommendation to UG | Date: \_\_\_\_\_\_\_\_\_\_ | Return by: \_\_\_\_\_\_\_\_\_\_ |
| 1. Bid Tab and Award Review and Approval | Date: \_\_\_\_\_\_\_\_\_\_  Date:  \_\_\_\_\_\_\_\_\_\_  Date:  \_\_\_\_\_\_\_\_\_\_ | Supervisor Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Administrator Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Deputy Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **13.** | **Contracts**: |  |  |
| 1. To Vendor   *\*(with usage template)* | Date: \_\_\_\_\_\_\_\_\_\_ | Return by: \_\_\_\_\_\_\_\_\_\_ |
| 1. Received   *\*(contracts, business license, COI, Performance Bond, if required)* | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Management Countersigns | Date:  \_\_\_\_\_\_\_\_\_\_ | Management Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 1. Copy returned to Vendor | Date:  \_\_\_\_\_\_\_\_\_\_ |  |
| 1. No Award Letters Mailed | Date:  \_\_\_\_\_\_\_\_\_\_ |  |
| **14.** | **Award Notice** |  |  |
| 1. Bid Summary Reporting Workbook | Date:  \_\_\_\_\_\_\_\_\_\_ | * *Award: Complete Summary, Bid Details, Outreach*   *No Award: Complete Non Awarded* |
| 1. Contract Rate of Change Workbook | Date:  \_\_\_\_\_\_\_\_\_\_ | Savings: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Cost Increase: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 1. FSF: Enter Contract for each vendor. | Date:  \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Supervisor Review   *\*don’t forget Section 11..* | Date:  \_\_\_\_\_\_\_\_\_\_ | Supervisor Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 1. Sent for Posting | Date:  \_\_\_\_\_\_\_\_\_\_ | *eMP enablements still require PS on MMP.* |

***Administrative Tasks to close the Award are on next page…***

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| **15.** | **Administrative Tasks** |  |  |
| 1. eMP: Was last contract eMP Enabled? | NO  YES | *\*If yes, action is required. (Vendors not on new contract need to be removed.)* |
| 1. eMP: Is contract being loaded? | NO  YES | *\*If yes, proceed with task closeout and begin eMP checklist.* |
| 1. List Serve Notice | Date:  \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Prepare electronic file   *(including emails)* | Date:  \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Prepare and file paper contract file, if applicable | Date:  \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Update usage tracker, if applicable | Date:  \_\_\_\_\_\_\_\_\_\_ |  |
| 1. Supervisor Review | Date:  \_\_\_\_\_\_\_\_\_\_ | Supervisor Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 16. | Archive |  |  |
|  | 1. Electronic File In Order and Ready for Archive | Date: \_\_\_\_\_\_\_\_\_\_ | SCPO Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | 1. Supervisor Review | Date: \_\_\_\_\_\_\_\_\_\_ | Supervisor Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | 1. Supervisor copy to ASI | Date: \_\_\_\_\_\_\_\_\_\_ |  |

**NOTE: Attach User Group List & Proposals Received, prior to filing**

APPENDIX A

CONTRACT EXTENSION PROCESS CHECKLIST (NON-PUBLIC WORKS)

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| Contract Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Contract Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Contract Period: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Contract Officer Assigned: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

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| **1.** | **Initial review.** | | |
| **Benchmark**: Pricing, Scope of Work, User Group Tracking, Vendor Review & Tracking. | Date: |  |
| UG wishes to extend | Date: | YES |
| Check Federal Excluded Party List (EPLS)  *\*Link to vendor name in benchmark* | CLEAN  ISSUES | *If issues, requires DAG involvement.* |
| **2.** | **Extension Approval.** | Date: \_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_ | Supervisor Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Administrator Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Deputy Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **3.** | **Vendor Engagement.** | | |
| 1. **Contract review.** | | |
| * Usage reports current? | NO  YES |  |
| * Business License on file and current? | NO  YES |  |
| * Insurance on file and current? | NO  YES |  |
| * Performance Bond, if required | NO  YES |  |
| 1. **Negotiations.** | | |
| * To Vendor | Date: \_\_\_\_\_\_\_\_\_\_ | Return by: \_\_\_\_\_\_\_\_\_\_ |
| * Received | Date: \_\_\_\_\_\_\_\_\_\_ |  |

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|  | 1. **Amendments.** | | | |
| * Supervisor Review | | Date:  \_\_\_\_\_\_\_\_\_\_ | Supervisor Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| * To Vendor | | Date: \_\_\_\_\_\_\_\_\_\_ | Return by: \_\_\_\_\_\_\_\_\_\_ |
| * Received | | Date: \_\_\_\_\_\_\_\_\_\_ |  |
| * All updated documents received? | | NO  YES |  |
| * Any contact updates? | | NO  YES |  |
| * Management Countersigns | | Date:  \_\_\_\_\_\_\_\_\_\_ | Management Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| * Copy returned to Vendor | | Date:  \_\_\_\_\_\_\_\_\_\_ |  |
| **4.** | **Award Notice Addendum.** | | | |
| 1. Bid Summary Reporting Workbook | Date:  \_\_\_\_\_\_\_\_\_\_ | | *Extension tab.* |
| 1. Contract Savings Workbook | Date:  \_\_\_\_\_\_\_\_\_\_ | | Savings: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 1. FSF: Update Contract for each vendor. | Date:  \_\_\_\_\_\_\_\_\_\_ | |  |
| 1. Supervisor Review   *\*Can be turned in with 6.c.* | Date:  \_\_\_\_\_\_\_\_\_\_ | | Supervisor Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 1. Sent for Posting | Date:  \_\_\_\_\_\_\_\_\_\_ | |  |
| **5.** | **Administrative Tasks.** | | | |
| 1. eMP: Update Contract for each vendor. | Date:  \_\_\_\_\_\_\_\_\_\_ | |  |
| 1. List Serve Notice | Date:  \_\_\_\_\_\_\_\_\_\_ | |  |
| 1. Update electronic file | Date:  \_\_\_\_\_\_\_\_\_\_ | |  |
| 1. Update paper contract file, if applicable | Date:  \_\_\_\_\_\_\_\_\_\_ | |  |
| 1. Did any vendor(s) fall off? | NO  YES | | *\*If yes, a note needs to be made to verify removal from MMP and eMP, if applicable.* |
| 1. Update usage tracker | Date:  \_\_\_\_\_\_\_\_\_\_ | |  |
| 1. Supervisor Review | Date:  \_\_\_\_\_\_\_\_\_\_ | | Supervisor Signature:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 1. Close Task, if applicable | Date:  \_\_\_\_\_\_\_\_\_\_ | |  |