GOVERNMENT SUPPORT SERVICES (GSS)

CONTRACT BID PROCESS CHECKLIST (NON-PUBLIC WORKS)

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

|  |  |  |  |
| --- | --- | --- | --- |
| **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

|  |  |  |  |
| --- | --- | --- | --- |
| **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:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

|  |  |  |  |
| --- | --- | --- | --- |
| **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)

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

|  |  |
| --- | --- |
| **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: \_\_\_\_\_\_\_\_\_\_ |  |

|  |  |
| --- | --- |
|  | 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: \_\_\_\_\_\_\_\_\_\_ |  |