**Procurement – Invitation to Bid Worksheet**

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| **Grantee:** | Click or tap here to enter text. |
| **Completed by:** | Click or tap here to enter text. |
| **Item to Procure:** | Click or tap here to enter text. |
| **Date Completed:** | Click or tap here to enter text. |

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| **PART 1 – Before Solicitation Announced/Advertised**Planning and Solicitation Preparation |

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| **Invitation to Bid (Sealed Bids) Check List Worksheet**( 4220.1F.VI.3.c.) (2 CFR §200.320(b)(1)) |
|  | **True** | **False** |
| 1. The Specification worksheet is completed?  |[ ] [ ]
| 2. The Necessity worksheet is completed?  |[ ] [ ]
| 3. The Independent Estimate worksheet is completed?  |[ ] [ ]
| 4. The Procurement Method Selection worksheet is completed and Invitation to Bid Method (ITB), Sealed Bids resulted?  |[ ] [ ]
| 5. Part 1 of the Responsibility Determination worksheet has been completed to plan the request and receipt of Responsible Offeror Criteria?  |[ ] [ ]
| 6. The Publicity Plan worksheet for planning the announcement/advertisement is completed?  |[ ] [ ]
| 7. Part 1 of the Requirements Prohibitions Analysis worksheet is completed in reference to the draft ITB solicitation document and the Publicity Plan?  |[ ] [ ]
| 8. All required clauses and certifications included from Federal Clause and Certification Check List? |[ ] [ ]

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| **Invitation to Bid – Precise Specifications**The Bid solicitation document has a complete, adequate, precise, and realistic specification of purchase or description that will enable a prospective bidder to submit a proper bid.(4220.1F.VI.3.c.(1)(a)) |
|  | **True** | **False** |
| The Solicitation documents are complete and include a copy of the contract or purchase order to be used?  |[ ] [ ]
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| **Solicitation and Contract Contents Check List**Contents of Solicitation documents and Contract include the following items and should be the same responses as on the planning worksheets and clauses check list (see Item Specifications and Necessity worksheets). |
|  | **True** | **False** |
| Procurement Method (Sealed Bids or Invitation to Bid)?  |[ ] [ ]
| Contract Type (Firm Fixed Price Contract – Purchase Order with Clauses)?  |[ ] [ ]
| Date, time and place of public bid opening?  |[ ] [ ]
| Statement that winning bid will be based upon lowest price? |[ ] [ ]
| ITB Protest Procedures? |[ ] [ ]
| Statement that ITB does not have geographic preference considerations? |[ ] [ ]
| Item or Service specifications, technical requirements, or performance requirements (see Item Specification Worksheet)?  |[ ] [ ]
| Quantities (see Necessity Worksheet)?  |[ ] [ ]
| Performance Period?  |[ ] [ ]
| Options descriptions to be evaluated?  |[ ] [ ]
| Statement to require disclosure of any personal or organizational conflicts of interest? |[ ] [ ]
| Contractor Experience Requirements, if any?  |[ ] [ ]
| Responsible Contractor Determination items requested (review Responsible Determination worksheet)? |[ ] [ ]
| Funding to be used?  |[ ] [ ]
| Evaluation Factors that are to be used to determine the winning bid? |[ ] [ ]
| Payment provisions described (Paid upon invoice after delivery of item or service or other description, No payments before award of funding, No payments in advance of work completed or delivery of assets, No progress payments for work not completed)?  |[ ] [ ]
| For Rolling Stock – Items addressed in solicitation (Rolling Stock worksheet – Solicitation Planning section) |[ ] [ ]
| For Construction – Any bonding requirements? Items addressed in solicitation (Construction worksheet – Solicitation Planning section) |[ ] [ ]
| Method of contract performance oversight procedures? |[ ] [ ]
| Disclosure that all bids may be rejected if the recipient wishes to have that option? |[ ] [ ]
| All required clauses and certifications included from Federal Clause and Certification Check List? |[ ] [ ]

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|  | **True** | **False** |
| **Invitation to Bid – Adequate Sources**(4220.1F.VI.3.c.(1)(b)) |
| The ITB is expected to attract two or more responsible bidders?  |[ ] [ ]
| **Invitation to Bid – Publicity**(4220.1F.VI.3.c.(1)(a)) (2 CFR §200.320(b)) |
| The Publicity Plan worksheet for review prior to advertisement is completed?  |[ ] [ ]
| **Invitation to Bid – Sufficient Time**(4220.1F.VI.3.c.(1)(d)) |
| Does the ITB allow for sufficient time to prepare bids before the date of bid opening?  |[ ] [ ]
| **Invitation to Bid – Public Opening**The ITB must give the time and place prescribed for the public opening of bids.(4220.1F.VI.3.c.(1)(e)) |
| Does the ITB give the time and place prescribed for the public opening of bids?  |[ ] [ ]
| **Invitation to Bid – Discussions Unnecessary**(4220.1F.VI.3.c.(1)(e)) |
| The ITB does not include discussions with bidders after bids have been submitted?  |[ ] [ ]
| **Invitation to Bid – Price Determinative Evaluation Factor**The successful bidder is to be selected on the basis of solicitation price and price-related factors and not on other factors that cannot be measured at the time of the award (and not on the basis of contract factors other than the responsible determination.)(4220.1F.VI.3.c.(1)(d)) |
| The successful bidder is to be selected on the basis of solicitation price and price-related factors?  |[ ] [ ]
| **Invitation to Bid – Fixed Price Contract**A firm fixed price contract is awarded to the lowest responsive and responsible bidder, but a fixed price incentive contract or inclusion of an economic price adjustment provision can sometimes be appropriate.(4220.1F.VI.3.c.(1)(c)) (2 CFR §200.320(b)(1)(ii)(D)) |
| The contract type is a Fixed Price Contract? (2 CFR §200.320(b)(1)(ii)(D)) |[ ] [ ]
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| **Invitation to Bid – Prequalification Lists**(4220.1F.VI.1.c.(1)) (4220.1F.VI.2.a.(4)(a)) (4220.1F.VI.1.c.(2)) (4220.1F.VI.2.a.(4)(a)) (4220.1F.VI.1.c.(3)) (4220.1F.VI.2.a.(4)(a)) |
| Prequalification lists were not used, or if used were used kept current, had sufficient qualified sources, and permitted qualification during the solicitation period?  |[ ] [ ]

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| **PART 1 – End Check Point**Planning and Solicitation Preparation |
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| **Invitation to Bid – Letter to Proceed with Advertisement**Before advertising the procurement, submit the planning and solicitation documents to TDOT for review and to receive the letter to proceed with solicitation. After receiving letter to proceed, advertise and run the Invitation to Bid. See Part 2 for next steps, Before Contract Executed/Awarded review. |
|  | **True** | **False** |
| Before advertising the procurement, will the planning and solicitation documents be submitted to TDOT for review and to issue a letter to proceed with the Invitation to Bid?  |[ ] [ ]

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| **PART 2 – Before Contract Executed/Awarded**Evaluation and Award Preparation |

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| **Invitation to Bid (Sealed Bids) Solicitation*** Advertise and run the Invitation to Bid (ITB) according to plan.
* If do not receive two or more responsible bidders willing to compete, perform single bid analysis.
* Receive bids and have bid opening.
* Evaluate bids based only on the evaluation factors included in the solicitation documents.
* Select winning bid but wait on contract execution.
* Winning bid should be the lowest price.
* Confirm that the offered item service meets the ITB specifications.
* Complete a responsible contractor analysis.
* Confirm the acceptance of the clauses and certifications in the winning bid package.
* If Rolling Stock procurement, complete pre-award certifications.
* If Construction procurement, confirm receipt of bond requirements.
* Confirm that the accepted total price amount is reasonable, complete Cost or Price Analysis.
* Provide reasons for selection of the winning bid, and reasons for any rejected bids.
* Provide justification for the award price.
* Confirm contract to be used contains all clauses.
* Submit documentation to TDOT for Letter to Proceed with Contract Execution.
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|  | **True** | **False** |
| **Bid Record**The ITB bid tabulation result is attached? |[ ] [ ]
| **Publicity**The ITB must be publicly advertised. The Publicity Plan worksheet for review after bid evaluations is completed? (4220.1F.VI.3.c.(2)(a)) |[ ] [ ]
| **Public Opening**The bid opening occurred at the place and time advertised?(4220.1F.VI.3.c.(2)(e)) |[ ] [ ]
| **Adequate Sources**Two or more responsible bidders made offers?(4220.1F.VI.3.c.(1)(b)) (2 CFR §200.320(b)(1)(ii)) |[ ] [ ]
| **Precise Specifications**The selected offer was a proper bid and matches the solicitation specifications?(4220.1F.VI.3.c.(1)(a)) (2 CFR 200.320(b)(1)) |[ ] [ ]
| **Price Determinative**The successful offer is selected based on the lowest price?(4220.1F.VI.3.c.(1)(d)) |[ ] [ ]
| **Fixed Price Contract**The contract type is a Fixed Price Contract or Purchase Order with Clauses attached? (2 CFR §200.320(b)(1)(ii)(D)) |[ ] [ ]

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| **Evaluation** |
|  | **True** | **False** |
| Evaluation factors used to determine winning bid were specified in the solicitation documents?(4220.1F.VI.7.) |[ ] [ ]
| Options evaluated were disclosed in the solicitation and priced in the bids or Options were not evaluated?(4220.1F.VI.7.b.) |[ ] [ ]
| All bids were not rejected or if they were that right was disclosed in the ITB?(4220.1F.VI.2.g.) |[ ] [ ]

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| **Responsible Contractor Determination** |
|  | **True** | **False** |
| The Responsible Determination worksheet is completed for the selected offer? (4220.1F VI.2.a.) (2 CFR Part §200.318(h)) |[ ] [ ]

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| **Rolling Stock Requirements** |
|  | **N/A** | **True** | **False** |
| The Rolling Stock Requirements worksheet Pre-Award section is completed for the selected offer or the procurement is not for Rolling Stock?(4220.1F.IV.2.e.) |[ ] [ ] [ ]

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| **Construction Requirements** |
|  | **N/A** | **True** | **False** |
| The Construction Requirements worksheet is completed for the selected offer or the procurement is not for Construction? (4220.1F.IV.2.i.) |[ ] [ ] [ ]

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| **Price Analysis and Cost Analysis** |
|  | **True** | **False** |
| The Price Analysis and Cost Analysis worksheet is completed for the selected offer? (4220.1F.VI.6.) (2 CFR Part §200.324) |[ ] [ ]

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| **Requirements Prohibitions Analysis – Competitive Procurements** |
|  | **True** | **False** |
| The Requirements Prohibitions Analysis worksheet completed to check solicitation was in compliance? |[ ] [ ]

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| **Clauses and Certifications Checklist** |
|  | **True** | **False** |
| The Clauses and Certifications Check List is completed to check for required compliance? |[ ] [ ]

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| **PART 2 – End Check Point**Evaluation and Award Preparation |
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| **Invitation to Bid – Letter to Proceed with Award Execution**Before executing the award contract, submit the evaluation and award documents to TDOT for review and to receive the letter to proceed with award contract. After receiving letter to proceed, execute contract with selected bidder. See Part 3 for next steps, Contract Administration review. |
|  | **True** | **False** |
| Before executing the award contract, will the evaluation and award documents be submitted to TDOT for review and to issue a letter to proceed with the Award Execution?  |[ ] [ ]

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| **PART 3 – Post Award**Contract Administration |

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| **Invitation to Bid – Post Award*** Execute contract with winning bidder.
* Contract Administration – Oversight of contract performance executed as described in the solicitation.
* If Rolling Stock procurement, complete post award certifications before receiving titles.
* Contract Administration – Receive goods and services.
* Contract Administration – Pay invoices.
* Program reimbursement request.

(2 CFR §200.318(b)) |

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| **Rolling Stock Requirements** |
|  | **N/A** | **True** | **False** |
| The Rolling Stock Requirements worksheet Post Delivery section is completed for the selected offer?(4220.1F.IV.2.e.) |[ ] [ ] [ ]

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| **Final Documentation Submission to TDOT**After executing the contract or issuing the purchase and completing the post award contract administration tasks, submit copies of all final documentation and any post award documentation listed in the post award task list to TDOT.  |
|  | **True** | **False** |
| Will all post award documentation be submitted to TDOT?  |[ ] [ ]