

Procurement Documents Checklist

Competitive Sealed Bidding/Competitive Sealed Proposals/Expedited Procurement

Pre-RFP Issuance			
Document	Explanation of Document	Status	Notes
Bid and Proposal Checklist (requires signature during various steps of the process)	Tool used by procurement officer to track procurement documents		
Written Determination by Executive Director or Procurement Officer if Expedited Procurement	See MHBE Procurement Policies and Procedures § II.C.1: This document is a determination that urgent circumstances make it impractical for a procurement to be undertaken through more formal competitive procurement methods		
Statement of Work, inclusive of (explain in Notes column if not provided):			
Minority Business Goals Documentation: <ul style="list-style-type: none"> • MHBE MBE Goals Worksheet • Other documentation of MHBE’s MBE goals determination 	The Procurement Officer, in consultation with the MBE liaison, fills out the worksheet to determine and document the MBE goal and subgoals in keeping with GOMA guidelines		
Executive Director Waiver of MBE Goals	It must be determined that the public interest cannot reasonably accommodate the use of MBE requirements to issue such a waiver		

Drafts of the following documents:

- Standard Contract form
- Bid/Proposal Affidavit form
 - Includes various certifications made by the Offeror, including certification regarding commercial non-discrimination
- Contract Affidavit form
- Affidavit form affirming registration of business with SDAT, etc.
- Minority Business Enterprise Goal and Forms
 - Include forms where MBE goal exceeds 0%
 - Always state MBE goal in RFP/IFB
- Pre-Proposal Conference Response Form
- Federal Funds Requirements and Certifications form
 - Attach where Contract will include federal funds
- Conflict of Interest Affidavit and Disclosure form
- Non-Exchange Entity Agreement for [Trading Partner Agreement] attaching form for reporting Breach of Unsecured Personally Identifiable Information (PII)
 - Attach where Contractor or its subcontractors will have access to PII
- Non-Disclosure Agreement form
 - Attach where access to information the State deems confidential, in addition to or other than PII
- Software Escrow Agreement form
 - Attach where MHBE needs continued access to critical software in the event

Request for Proposals	Called an “Invitation for Bids” if Competitive Sealed Bidding is used. Use standard provisions from previous RFPs. SOW generally written by Contract Monitor or outside vendor if complicated.		
Procurement Timeline	<p>The following will be determined during this process:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Whether to have a pre-bid proposal conference <input type="checkbox"/> Whether to schedule time for posting of vendor questions and answers <input type="checkbox"/> Whether to schedule time for oral presentations <input type="checkbox"/> Whether to provide time to request and obtain best and final offers <input type="checkbox"/> How much time to provide for evaluation of proposals <input type="checkbox"/> Bid/Offer due date <input type="checkbox"/> Projected Contract award date <p>Often incorporated into RFP.</p>		
Signed Bid and Proposal Checklist	Should be completed through Post RFP Issuance		
RFP Issuance & Post-RFP Issuance			
Screen shot demonstrating that MHBE posted RFP to eMarylandMarketplace.com	This screenshot often contains clues to the components of an RFP		
Email or other document signifying MDOT’s broadcasting to NAICS Code for MBEs			
Intent to Respond Form from potential Offerors if included in Procurement Timeline			
Each Offeror’s Technical Proposal			
PIA versions of Technical Proposals	Typically required with submission		
Each Offeror’s Financial Proposal			
PIA versions of Financial Proposals	Typically required with submission		
Each Offeror’s Technical Clarifications document (if any)	MHBE sometimes requests, in writing, clarifications to technical proposals		

Responses to Questions and Exceptions			
Any RFP Amendments if Necessary			
Evaluation Matrix (not yet filled out)			

Bid & Proposal Evaluation Process

Responsiveness Checklist			
Documentation if offeror is considered non-responsive			
List of Evaluation Committee Members			
Signed Certifications of Impartiality for Members of Evaluation Committee			
Completed Evaluation Matrixes			
MHBE's Oral Presentation Notification (if any)			
Offerors' written answers to MHBE's oral presentation questions (if any)	This is also sometimes called an "orals clarification" document		
MHBE Best and Final Offer Request(s) (if any)	Multiple BAFO requests are possible. BAFO requests subsequent to the initial one are sometimes called "Supplemental BAFO Request(s)"		
Offerors' Best and Final Offer(s) (if any)	BAFO responses subsequent to first one are sometimes called "Supplemental BAFO Response(s)"		
Completed Evaluation Matrix if BAFO or Oral Presentations are used			
Additional records of negotiations (if any)	Negotiations primarily are documented through technical clarifications, BAFOs and oral presentations		

Pre-Board Approval Process

Debarment verification			
MHBE Recommendations for Award Memo, summarizing Evaluation Committee's scoring of Offerors' proposals	This Award Recommendation Memo often is presented to the Board of Trustees prior to Trustees' award of a contract		
Completed Procurement Document Checklist	Please fill out status column as well as notes column (if necessary for the latter)		
Model Motion			
Signed Bid and Proposal Checklist through Pre-Board Approval Process			

Completed Procurement Press Release Template	Should be distributed to Communications Department and CFO prior to Board Meeting. No need to retain in files		
Post-Board Approval Process			
All other signed RFP affidavits/agreements that RFP requires (See RFP for list of attachments)			
Board Meeting Minutes signifying approval			
MHBE Notice of Contract Award (Letter)			
Signed Contract (both parties and legal sufficiency) with all exhibits			
SDAT & Comptroller Screen Shot signifying registration			
Completed Bid & Proposal Checklist			
Completed Procurement Document Checklist			
Approved Purchase Orders and/or Blanket Purchase Orders (if any)			