

OPEN COMPETITIVE BID DOCUMENT CHECKLIST (Tenders or RFP's)

DOCUMENT NAME:

DOCUMENT NUMBER:

DOCUMENT TYPE

BUYER: Select

Pre-Bid

Individual and department conducting the procurement

○ Individual

○ Department

○ Approx. Value of Project

Update/Create Bid Document

Create Tables in Bids & Tender

Document review LM/JA

Controller or Assistant Manager has signed off that the document is ready for release on hard copy

Final version saved to Purchasing Shared Drive as filename. FINAL

Document reviewed in Bids and Tenders JA/LM

Update terms & conditions

Add reference tables in Bids & Tender

Final Review of Bid & Tender JA/LM

Simulate Submission

Generate Bid Document (rename "Online Bid Document")

Bid Document posted to Bids & Tender (FINAL unsigned PDF)

Bid Evaluation

Selected Evaluation Team Leader

Selected Evaluation team and the names are listed in the file

Evaluator meeting held, if required

Evaluator Handbook completed and given out to all evaluators

Received all Evaluation Team Non-Disclosure Agreement & Team Conflict of Interest Disclosure Sign-Off (file)

Received all completed Evaluation Forms – Electronically – file a copy

Addendums

Respond to all questions either by email or by Addendum

Addendums list question and answers

Post in PDF Format

How many Addendums were posted?

Was closing date changed? If so when?

Pre-Award

Bid Submission Summary prepared and signed off by Controller or Designate

Any other required documentation collected (i.e. professional certifications, WSIB, etc.)

Service Agreement reviewed and signed by Assistant Manager of Accounting and Purchasing or Controller

Award

Service Agreement signed by Controller and in file

Formal Letter of Award sent to successful bidder/respondent (file)

Award Notification Letter posted to Bids & Tender (file)

Insurance documents collected and provided to Risk Management office (Steph or Erin)

Post-Award

All documentation/evaluation forms collected and added to document file

Convert to contract updated with expiry dates and possible extensions (bottom of page in Bids & Tenders)

File moved to cabinet

Final Sign Off & Date: _____