Invitation to Bid (ITB) Checklist

The Invitation to Bid (ITB) Checklist is a tool help verify the completeness of your ITB document. Use it in conjunction with the approved ITB template and provisional library.

Refer to the [Competitive Sealed Bidding (ITB)](https://www.oregon.gov/das/OPM/Pages/bidding.aspx) section of the Oregon Procurement Manual for more information on developing an ITB.

Agency Responsibilities

The following checklist items are the minimum requirements of an agency procurement professional when developing an ITB. If an agency is delegated authority to conduct the procurement, the agency procurement professional should verify all items shown in both the Agency Responsibilities and DAS Procurement Services Responsibilities sections of this checklist.

Verify procurement authority is granted through statute, rule, or other authority, or DAS delegated authority is documented.

Verify additional terms and acronyms are defined, citations are included and accurate, exhibits and attachments are referenced and included.

Verify procurement overview, scope, and requirements are documented.

* Purpose of the solicitation (expected outcomes, driving factors, etc.).
* Beneficiaries or authorized users of the products or services.
* A clear description of the product or service requirements, including:
* Product specification and scope of work.
* Contractor responsibilities and duties.
* Performance requirements and expected outcomes.
* Delivery requirements.
* Acceptance criteria.
* If a brand name specification is required, the agency procurement professional has determined that only the identified brand name will meet the agency needs prior the solicitation’s issuance.
* Estimated contract amount, including renewals.

Verify evaluation and selection approach is documented.

* Bidder qualifications, including licenses, certifications, references, or other.
* Specify if life cycle costing will be used to evaluate bids and describe how it will be considered.
* Describe relevant bid evaluation information, such as projected product usage, operating environment, and operating period.
* Identify the information a bidder must provide to derive the procurement’s life cycle cost.
* Award information that identifies single, multiple, or regional awards, possible length of contract and options for renewal.

DAS Procurement Services Responsibilities

The DAS Procurement Services assigned staff will verify the following checklist items in coordination with the agency. If an agency is delegated authority to conduct the procurement, the agency procurement professional should verify this section of checklist items.

Verify bidding method and bid award are fully described.

* If multiple awards, the scoring methodology, the number of contracts to be awarded, and the methodology to be used when choosing a supplier from this type of award.
* If there are add alternates, describe the products or services and how those may or may not be factored into the final pricing.
* Contract term and renewal options (how many terms and length of each term).
* If successive rounds of bidding may be considered, this option must be specified and explained in the ITB.
* If using a multi-step Competitive Sealed Bidding method, this option must provide instruction for separate submissions of technical and pricing bids.
* Any formula used to determine cost scoring or ranking.

Verify general information is included.

* ITB contact and location information:
* Identify a Single Point of Contact (SPC) by name and title.
* Identify the location of the office where the solicitation document may be reviewed.
* Bid format and number of bid copies for submission:
* Hard copies:
* How to address the bid package.
* Number of pages allowed, and what constitutes a page.
* Electronic copies.
* Other format:
* CD
* Thumb drives
* Any possible interviews.
* ITB provisions must:
* State procuring agency may cancel the procurement or reject any or all bids (refer to ORS 279B.055(2)(e)).
* State contractor must use recyclable products to the maximum extent economically feasible in the performance of the contract work (refer to ORS 279B.055(2)(f)).
* Include all applicable contract terms and conditions (refer to ORS 279B.055(2)(h)).
* Specify compliance with all federal, state and local laws, regulations, executive orders and ordinances applicable to the contract (refer to DAS-supplied. Provisional Library)

Verify ITB schedule and location of events is documented:

* Time and date of bid closing and location to submit.
* Time, date and place of public bid opening.
* Planned award date of the procurement.
* Last day for clarifications and questions.
* Due dates to file a protest.
* Pre-bid conference (Factors to consider include complex procurements, new procurements, opportunities for COBID participation, etc.).
* If a pre-bid conference is planned, specify:
* Mandatory or optional attendance.
* Time, date and location.
* Option to attend through remote access via teleconferencing or web conferencing and information on how to access.
* Include a disclaimer that verbal statements made by the agency or DAS representatives or consultants at the conference are not binding unless confirmed by written addendum.
* If a facility or building site visit is planned, specify:
* Mandatory or optional attendance.
* Requirements, including options, for scheduled site visit.
* Time, date and location.
* Information on access, parking, security, etc.
* Prequalification (if required)
* Include the date potential bidders must submit response to a Request for Qualifications.
* Include the class of products or services for which potential bidders must be prequalified.

Verify offer format and content requirements are clearly stated in the solicitation.

* Contractor information or special forms, including proof of licenses, references, or other.
* Samples required to be submitted with bid, if any.
* A comprehensive description of the product or service, provided by the requesting agency, including:
* Specifications and scope of work for the needed product or service.
* Delivery or performance schedule or milestones.
* Inspection and acceptance criteria.
* Contractor’s anticipated duties and outcomes.
* Expectations for the contractor’s performance.
* Statement requiring contractors perform work according to the highest industry standards for their profession.
* If ITB includes brand name specification, confirmation that ORS 279B.215 authorization is referenced.
* Specification for “brand name or equal,” “equivalent” or “brand name or approved equal,” “approved equivalent” is correctly stated:
* “Equal" or "equivalent" to the product brands specified is determined and decided upon after bid closing.
* “Approved equal" or "approved equivalent," requires a timely decision of a potential bidder’s request for approval prior to bid closing.
* Methods and dates for potential bidders to submit requests for modification of ITB provisions a specified, including:
* Requests for brand approval or substitutions.
* Requests for clarification.
* Requests for changes to contractual terms or specifications.
* Protests of provisions contained in the ITB.

Verify approach to determining lowest responsive bid and responsible bidder is fully described and incorporates language from provisional library, as applicable.

* Bid items for which pricing is required and for which pricing is optional are identified.
* If life cycle costing will be used in evaluating bids, ITB describes how it will be considered, provides relevant information for bid evaluation and describes any information a bidder must include to calculate the product or service life cycle cost.
* Applicable preferences considered in evaluation, including reciprocal preference (refer to ORS 279A.120) and recycled material (refer to ORS 279B.055(2)(f)).