



## **SOLICITATION CHECKLIST** (For IFB, RFP, RFQ, ITN, etc.)

<b>PROJECT INFORMATION</b>	
Project #/Title:	Dept. Contact:
Solicitation #/Title:	Procurement Method:

### **1. Planning & Pre-Solicitation**

- ☐ Need identified by requesting department
- ☐ Scope of work / technical specifications drafted and reviewed
- ☐ Confirm budget availability and account/funding source
- ☐ Risk Management consulted for insurance/bond requirements
- ☐ Pre-solicitation meeting held (if applicable)
- ☐ Procurement method determined (IFB, RFP, RFQ, ITN, etc.)
- ☐ Develop procurement schedule (including deadlines, review periods, approvals)
- ☐ Create solicitation folder (digital and/or physical)

### **2. Drafting & Internal Review**

- ☐ Draft solicitation document and attachments/exhibits (forms, agreement, etc.)
- ☐ Legal review (if required)
- ☐ Review by Risk, Finance, and/or requesting department
- ☐ Evaluation criteria and scoring matrix created (for RFPs/RFQs)
- ☐ Conflict of Interest forms signed (if applicable)
- ☐ Minority/Women-Owned/Disadvantaged Businesses considered (if applicable)

### **3. Posting & Vendor Engagement**

- ☐ Advertisement/posting prepared (newspaper, DemandStar, etc.)
- ☐ Solicitation posted on required platforms / company website



- ☐ Cone of Silence enacted (if applicable)
- ☐ Pre-bid/pre-proposal meeting scheduled and held (if applicable)
- ☐ Responses to vendor questions issued via addenda

#### 4. Receipt & Evaluation

- ☐ Bid/proposal opening (with bid tabulation or attendance log)
- ☐ Responsiveness and responsibility check
- ☐ Evaluation committee convened (if applicable)
- ☐ Evaluation scores compiled (for RFPs/RFQs)
- ☐ Reference checks completed
- ☐ Suspended/debarred vendor check completed
- ☐ Shortlist determined / interviews or demos held (if applicable)

#### 5. Award & Post Evaluation

- ☐ Notice of Intent to Award issued and posted
- ☐ Debriefing provided (if requested)
- ☐ Resolution developed or award memo prepared (as needed)
- ☐ PO/BPA created and vendor registered (if not already)
- ☐ Contract finalized and executed
- ☐ Terminate Cone of Silence (if applicable)

#### 6. Post-Award Closeout

- ☐ Award log / records updated
- ☐ Procurement file finalized (including signed documents, evaluation records, etc.)
- ☐ Final budget/accounting codes recorded
- ☐ File peer-reviewed or QA checked