



SOLICITATION FOLDER STRUCTURE (For IFB, RFP, RFQ, ITN, etc.)

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

Folder Name: Solicitation # and Project #/Title

- **Example:** IFB 2025-001-FPH Janitorial Services

00 - Pre-Solicitation

- ☐ Need/Request Justification (e.g., email, memo)
- ☐ Budget Approval / Funding Source Docs
- ☐ Procurement Method Determination (IFB/RFP/RFQ/ITN)
- ☐ Risk Review (Insurance & Bond Requirements)
- ☐ Pre-Solicitation Meeting Notes (if applicable)
- ☐ Conflict of Interest Forms (if applicable)
- ☐ Draft Timeline / Procurement Plan

01 - Solicitation Development

- ☐ Final Scope of Work / Technical Specifications
 - ☐ Draft Solicitation Document (Word format)
 - ☐ Final Solicitation Document (PDF)
 - ☐ Evaluation Criteria & Scoring Matrix (if applicable)
 - ☐ Internal Review Comments (Legal, Risk, Dept.)
 - ☐ Posting Authorization / Approval Form (if applicable)
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02 - Public Posting

- ☐ Advertisement Orders / Proof of Publication
 - ☐ DemandStar or eProcurement Posting Confirmation
 - ☐ Public Notice Documents (Sunshine Board, etc.)
 - ☐ Addenda Issued
 - ☐ Pre-Bid / Pre-Proposal Meeting Sign-In Sheets (if applicable)
 - ☐ Meeting Agenda / PowerPoint (if applicable)
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03 - Responses Received

- ☐ Submission Log / Time Stamp Records
 - ☐ Vendor Submissions
 - ☐ Vendor_1_Name
 - ☐ Proposal / Bid
 - ☐ Required Forms (insurance, references, etc.)
 - ☐ Vendor_2_Name
 - ☐ Proposal / Bid
 - ☐ Required Forms (insurance, references, etc.)
 - ☐ Bid Tabulation (IFB)
 - ☐ Responsiveness/Responsibility Checklist
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04 - Evaluation & Selection *(if applicable)*

- ☐ Evaluation Committee Appointments
- ☐ Conflict of Interest Disclosures
- ☐ Evaluator Scoring Sheets
- ☐ Scoring Summary / Consensus Meeting Notes
- ☐ Reference Checks
- ☐ Interview / Demo Materials (if held)



05 - Award & Approval

- ☐ Notice of Intent to Award
 - ☐ Bid Protest Documents (if applicable)
 - ☐ Award Memo or Resolution
 - ☐ Council / Board Approval Documentation
 - ☐ PO / BPA / Contract Setup or Request Forms (if applicable)
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06 - Contract Documents

- ☐ Executed Contract / Agreement
 - ☐ Certificates of Insurance
 - ☐ Performance & Payment Bonds (if required)
 - ☐ Vendor Registration / W-9
 - ☐ Contract Routing / Approval Checklist
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07 - Closeout

- ☐ Finalized File Checklist
- ☐ QA or Peer Review Form
- ☐ Lessons Learned / Debrief Notes
- ☐ Final Budget / Fund Allocation Confirmation
- ☐ Archive Approval / Record Retention Notes