**Procurement – Invitation to Bid Worksheet**

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| **Grantee:** | Click or tap here to enter text. |
| **Completed by:** | Click or tap here to enter text. |
| **Item to Procure:** | Click or tap here to enter text. |
| **Date Completed:** | Click or tap here to enter text. |

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| **Sealed Bids or Invitation to Bid**  (2 CFR §200.320(b)(1))  As presented in 2 CFR §200.320(b)(1) Sealed Bids are a procurement method in which bids are publicly solicited and a firm fixed-price contract (lump sum or unit price) is awarded to the responsible bidder whose bid, conforming with all the material terms and conditions of the invitation for bids, is the lowest in price. |

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| **Invitation to Bid Worksheet – Part 1**  *Completed and submitted prior to launching publicity plan* |

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| **Invitation to Bid (ITB) (Sealed Bids) Check List Worksheet**  (4220.1F.VI.3.c.) (2 CFR §200.320(b)(1)) | | |
|  | **True** | **False** |
| 1. The Specification worksheet is completed? |  |  |
| 2. The Necessity worksheet is completed? |  |  |
| 3. The Independent Estimate worksheet is completed? |  |  |
| 4. Part 1 of the Procurement Method Selection worksheet is completed and Invitation to Bid Method (ITB), Sealed Bids resulted? |  |  |
| 5. Part 1 of the Publicity Plan worksheet for planning the announcement/advertisement is completed? |  |  |
| 6. Part 1 of the Responsibility Determination worksheet has been completed to plan the request and receipt of Responsible Offeror Criteria? |  |  |
| 7. Part 1 of the Contract Administration worksheet is completed? |  |  |
| 8. All required clauses and certifications included from Federal Clause and Certification Check List? |  |  |

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| **Sealed Bid Requirements**  If sealed bids (invitation to bid) are used, the following requirements apply.  (4220.1F.VI.3.c.(2)) (2 CFR §200.320(b)(1)(ii)) | | | |
| **Invitation to Bid – Precise Specifications**  The invitation for bids, which will include any specifications and pertinent attachments, must define the items or services in order for the bidder to properly respond;  (4220.1F.VI.3.c.(1)(a)) (2 CFR §200.320(b)(1)(B)) | | | |
|  | | **True** | **False** |
| The planning specification worksheet is completed as presented in the ITB advertisement, and the advertisement contains the specifications definitions in sufficient detail for the Offeror to prepare and submit a proper response? | |  |  |
| **Invitation to Bid – Adequate Sources**  Bids must be solicited from an adequate number of qualified sources…  (4220.1F.VI.3.c.(1)(b)) (2 CFR §200.320(b)(1)(ii)(A)) | | | |
| The ITB is expected to attract two or more (adequate number) qualified, responsible bidders? | |  |  |
| **Invitation to Bid – Sufficient Time**  … providing them sufficient response time prior to the date set for opening the bids, …  (4220.1F.VI.3.c.(1)(d)) (2 CFR §200.320(b)(1)(ii)(A)) | | | |
| **Planned ITB Start Advertising Date:** | Click or tap to enter a date. | | |
| **Planned ITB Due Date:** | Click or tap to enter a date. | | |
| **Planned ITB Bid Opening Date:** | Click or tap to enter a date. | | |
| The ITB solicitation provides for sufficient response time prior to the date set for opening the bids to allow vendors to prepare proper bids? | |  |  |
| **Invitation to Bid – Publicity**  … for local, and tribal governments, the invitation for bids must be publicly advertised;  (4220.1F.VI.3.c.(1)(a)) (2 CFR §200.320(b)(1)(A)) | | | |
| The publicity plan has been developed and the Publicity Plan planning worksheet completed for review prior to advertisement? | |  |  |
| **Invitation to Bid – Pre-Bid Conference**  A recipient may hold a pre-bid conference with prospective bidders before bids have been received.  (4220.1F.VI.3.c.(1)(e)) | | | |
| Will the recipient hold a pre-bid conference for prospective bidders? | |  |  |
| **If applicable, Planned ITB Pre-Bid Conference Date:** | Click or tap to enter a date. | | |
| **Invitation to Bid – No Discussions After Receipt of Bids**  No discussions are necessary after receipt of bids from vendors.  (4220.1F.VI.3.c.(1)(e)) | | | |
| After the pre-bid conference, which is an opportunity for vendors to get clarification on the procurement, the recipient does not have a need for discussions with bidders? | |  |  |
| **Invitation to Bid – Public Opening**  All bids will be opened at the time and place prescribed in the invitation for bids, and for local and tribal governments, the bids must be opened publicly;  (4220.1F.VI.3.c.(1)(e)) (2 CFR §200.320(b)(1)(C)) | | | |
| **Projected Planned ITB Bid Opening Location:** | Click or tap here to enter text. | | |
| **Projected Planned ITB Bid Opening Time:** | Click or tap here to enter text. | | |
| Does the ITB advertisement state the time and place prescribed for the public opening of bids, and that the bids will be opened publicly? | |  |  |
| **Invitation to Bid – Award to be Based on Lowest Price**  The successful bidder is to be selected on the basis of the lowest price and, possibly in addition, price-related factors and not on other factors that cannot be measured at the time of the award (and not on the basis of contract factors other than the responsible determination.)  (4220.1F.VI.3.c.(2)(f)) (2 CFR §200.320(b)(1)(ii)(D)) | | | |
| The successful bidder is to be selected on the basis of the lowest price and if specified in the procurement document considers total price factors such as transportation costs, life cycle costs, etc.? | |  |  |
| Has the recipient prepared a bid tabulation/evaluation sheet for the invitation to bid and included it in the procurement documentation to be submitted to and reviewed by TDOT? | |  |  |
| **Invitation to Bid – Fixed Price Contract**  A firm fixed price contract is awarded …  (4220.1F.VI.3.c.(2)(f)) (2 CFR §200.320(b)(1)(ii)(D)) | | | |
| The ITB will award the procurement based on a unit or total fixed price contract type? | |  |  |
| **Invitation to Bid – Rejection of Bids**  Any or all bids may be rejected if there is a sound documented reason.  (4220.1F.VI.3.c.(2)(g)) (2 CFR §200.320(b)(1)(ii)(E)) | | | |
| The ITB has selected and advertised that the recipient may reject any or all bids for a sound documented reason? | |  |  |

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| **PART 1 – End Check Point**  *Completed and submitted prior to launching publicity plan* | | |
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| **Invitation to Bid – Letter to Proceed with Advertisement**  Before advertising the procurement, submit the planning and solicitation documents to TDOT for review and to receive the letter to proceed with advertising the solicitation. After receiving letter to proceed, advertise and run the Invitation to Bid. See Part 2 for next steps, Before Contract Executed/Awarded review. | | |
|  | **True** | **False** |
| Before advertising the procurement, will the planning and solicitation documents be submitted to TDOT for review and to issue a letter to proceed with the advertisement of the Invitation to Bid? |  |  |

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| **Invitation to Bid Worksheet – Part 2**  *Completed and submitted prior to issuing purchase order or executing contract* |

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| **Invitation to Bid (Sealed Bids) Solicitation**   * Advertise and run the Invitation to Bid (ITB) according to plan. * If do not receive two or more responsible bidders willing to compete, perform single bid analysis. * Receive bids and have bid opening. * Evaluate bids based only on the evaluation factors included in the solicitation documents. * Select winning bid but wait on contract execution. * Winning bid should be based on the lowest price. * Confirm that the offered item service meets the ITB specifications. * Complete a responsible contractor analysis. * Confirm the acceptance of the clauses and certifications in the winning bid package. * If Rolling Stock procurement, complete pre-award certifications. * If Construction procurement, confirm receipt of bond requirements. * Confirm that the accepted total price amount is reasonable, complete Cost or Price Analysis. * Provide reasons for selection of the winning bid, and reasons for any rejected bids. * Provide justification for the award price. * Confirm contract to be used contains all clauses. * Submit documentation to TDOT for Letter to Proceed with Contract Execution. |

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| **Bid Record** | | |
|  | **True** | **False** |
| The ITB bid tabulation result documentation for the Bids received is attached? |  |  |
| **Adequate Sources** | | |
| Two or more responsible bidders made offers?  (4220.1F.VI.3.c.(1)(b)) (2 CFR §200.320(b)(1)(ii)(A)) (2 CFR §200.320(b)(1)(i)(B)) |  |  |
| **Sufficient Time** | | |
| The ITB solicitation provided sufficient response time prior to the date set for opening the bids to allow vendors to submit proper bids?  (4220.1F.VI.3.c.(1)(d)) (2 CFR §200.320(b)(1)(ii)(A)) |  |  |
| **Publicity** | | |
| The ITB must be publicly advertised. The Publicity Plan worksheet for review after bid evaluations is completed and the solicitation was advertised?  (4220.1F.VI.3.c.(2)(a)) (2 CFR §200.320(b)(1)(ii)(A)) |  |  |
| **Precise Specifications** | | |
| **Selected Bid Matches Solicitation Specifications**  The selected bid was a proper bid and matches the solicitation specifications?  (4220.1F.VI.3.c.(1)(a)) (2 CFR §200.320(b)(1)(ii)(B)) (2 CFR 200.320(b)(1)(i)(A)) |  |  |
| **Precise Specifications**  Specifications for items or services were sufficiently described in the solicitation?  (4220.1F.VI.3.c.(1)(a)) (2 CFR §200.320(b)(1)(ii)(B)) (2 CFR 200.320(b)(1)(i)(A)) |  |  |
| **Public Opening** | | |
| The bid opening occurred at the place and time advertised?  (4220.1F.VI.3.c.(2)(e)) (2 CFR 200.320(b)(1)(ii)(C)) |  |  |
| **Fixed Price Contract** | | |
| The contract type is a Fixed Price Contract or Purchase Order with Clauses attached?  (4220.1F.VI.3.c.(1)(c)) (2 CFR §200.320(b)(1)(ii)(D)) (2 CFR §200.320(b)(1)(i)(C)) |  |  |
| **Award to be Based on Lowest Price** | | |
| The successful offer is selected based on the lowest price?  (4220.1F.VI.3.c.(1)(d)) (2 CFR §200.320(b)(1)(ii)(D)) (2 CFR §200.320(b)(1)(i)(C)) |  |  |

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| **Responsible Contractor Determination** | | |
|  | **True** | **False** |
| Part 2 of the Responsible Determination worksheet is completed for the selected offer?  (4220.1F VI.2.a.) (2 CFR Part §200.318(h)) |  |  |

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| **Price Analysis and Cost Analysis** | | |
|  | **True** | **False** |
| The Price Analysis and Cost Analysis worksheet is completed for the selected offer?  (4220.1F.VI.6.) (2 CFR Part §200.324) |  |  |

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| **Contract Administration** | | |
|  | **True** | **False** |
| Part 2 of the Contract Administration worksheet is completed? |  |  |

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| **Clauses and Certifications Checklist** | | |
|  | **True** | **False** |
| The Clauses and Certifications Check List is completed to check for required compliance? |  |  |

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| **PART 2 – End Check Point**  *Completed and submitted prior to issuing purchase order or executing contract* | | |
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| **Invitation to Bid – Letter to Proceed with Award**  Before executing the award contract, submit the evaluation and award documents to TDOT for review and to receive the letter to proceed with award contract. After receiving letter to proceed, execute contract with selected bidder. See Part 3 for next steps, Contract Administration review. | | |
|  | **True** | **False** |
| Before executing the award contract, will the evaluation and award documents be submitted to TDOT for review and to issue a letter to proceed with the Award? |  |  |

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| **Invitation to Bid Worksheet – Part 3**  *Completed and submitted prior to requesting expense reimbursement* |

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| **Invitation to Bid – Post Award**   * Execute contract with winning bidder. * Contract Administration – Oversight of contract performance executed as described in the solicitation. * If Rolling Stock procurement, complete post award certifications before receiving titles. * Contract Administration – Receive goods and services. * Contract Administration – Pay invoices. * Program reimbursement request.   (2 CFR §200.318(b)) |

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| **Contract Administration** | | |
|  | **True** | **False** |
| Part 3 of the Contract Administration worksheet is completed? |  |  |

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| **Final Documentation Submission to TDOT**  After executing the contract or issuing the purchase and completing the post award contract administration tasks, submit copies of all final documentation and any post award documentation listed in the post award task list to TDOT. | | |
|  | **True** | **False** |
| Will all post award documentation be submitted to TDOT? |  |  |