

## RFP / CONTRACT PROCESS CHECKLIST

### Things to be completed before an RFP RELEASE:

- Have the appropriate approvals been obtained within your agency?**
- Is there a budget?**
- Is IFC approval needed?**
- Does this contract require EITS approval? \_\_\_\_\_ (date requested from Robert Keith in EITS) \_\_\_\_\_ (date approval received)**
- Does a TIR need to be completed approved by EITS?**
- Complete an RFP Development Form**
- Set up an e-mail folder just for this procurement**
- Set up a hard copy contract folder**
- Set up an Information Request List (for when vendors request to be notified when the RFP is published)**
- Develop a vendor POC list which includes current contractor(s), companies which have proposed on past procurements, and vendors found in searches. This list can be added to the Information Request List (see above).**
- Approval of evaluators \_\_\_\_\_ (date requested) \_\_\_\_\_ (date received)**
- Approval of criteria and weights \_\_\_\_\_ (date requested) \_\_\_\_\_ (date received)**
- Enter evaluators contact information onto Information Request List (optional)**
- Does this contract involve federal funds? If yes, attach federal clauses.**
- Does this contract require a liquidated damages clause?**
- Does this contract require a performance bond?**

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- ❑ **Do these services include the electronic transmission of personal information? If yes, reference NRS 603A.215(2&3) in the RFP.**
- ❑ **Performance measurements are strongly recommended for every contract. Are the performance measurements listed in the RFP?**
- ❑ **Select dates for the RFP Timeline, making sure you and your evaluators will be available during the evaluation process. Put all the dates on your calendar.**
- ❑ **Reserve meeting rooms and A/V equipment (if applicable).**
- ❑ **Have your RFP team review the draft document and give input.**
- ❑ **Mark the final electronic document FINAL so that it can easily be found later and is distinguished from all drafts.**
- ❑ **Send an e-mail to your evaluators letting them know when they will be needed and what will be expected of them.**
- ❑ **Create an individual score sheet**

### **Things to be completed before the EVALUATION COMMITTEE MEETING:**

- ❑ **Look through all proposals, making sure vendors have not included confidential information in the non-confidential parts of their proposals. Resolve any problems.**
- ❑ **Create Consensus Score Sheet and verify formulas and weights.**
- ❑ **Send proposal packages to each evaluator. Packages will include cover letter, Accept/Decline memo, individual score sheets, technical proposals, RFP + amendments, Evaluator Guidelines (optional).**
- ❑ **Ensure all Accept/Decline memos are received and filed in hard copy folder.**
- ❑ **Prepare for evaluation committee meeting. (as is applicable, bring Cost proposals, Consensus Score Sheet, laptop with flash drive, one copy of each technical proposal, list of evaluators, pen/pencil, notepaper, calculator)**

### **Things to be completed before VENDOR PRESENTATIONS / DEMONSTRATIONS are held (if applicable):**

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- ❑ **Notify vendor(s) in writing of vendor presentations at least 14 days ahead of time, if possible.**
- ❑ **Develop additional evaluation criteria/weights, if desired.**
- ❑ **Prepare for vendor presentations. (as is applicable, bring Technical and Cost proposals, Consensus Score Sheet, laptop with flash drive, list of evaluators, pen/pencil, notepaper, calculator, individual score sheets)**

### Things to be completed before a LETTER OF INTENT is issued:

- ❑ **Dun and Bradstreet report on each selected vendor run; and, if financial statements were requested, both the D&B report and the financial statements should be reviewed by a finance person. If only the D&B report is applicable, then the CCM may assess the report. Either way a PASS / FAIL grade must be given. \_\_\_\_\_ (date requested from finance person, if applicable)  
\_\_\_\_\_ (date received from finance person, if applicable)**
- ❑ **Financial stability assessed by finance person \_\_\_\_\_ (date requested)  
\_\_\_\_\_ (date received) PASS / FAIL?**
- ❑ **References checked? (only applicable if the evaluation committee decides to look further into a vendor's references other than what is submitted in the proposal)**
- ❑ **Federal Debarred Vendor List checked and reports filed in hard copy folder (<https://www.sam.gov/portal/public/SAM/>)**
- ❑ **Approval from management to issue LOI**
- ❑ **LOI issued**

### Things to be completed before a CONTRACT is sent to Budget:

- ❑ **Negotiate contract terms, if applicable.**
- ❑ **W-9 and voided check or bank info letter obtained from vendor? \_\_\_\_\_  
(date requested) \_\_\_\_\_ (date received)**

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- ❑ **W-9 and voided check or bank info letter submitted to Controller's Office?**  
\_\_\_\_\_ (date submitted)
- ❑ **If EITS' approval is needed for CETS entry, ask EITS to apply their approval in CETS.** \_\_\_\_\_ (date requested from Robert Keith)
- ❑ **Is the vendor in good standing with Secretary of State's Office? YES / NO**
- ❑ **Were the signed amendments included in proposal (if applicable)?**
- ❑ **ATTACHMENT A: Confidentiality and Certification of Indemnification included in proposal?**
- ❑ **ATTACHMENT C: Vendor Certifications included in proposal?**
- ❑ **ATTACHMENT J: Lobbying Certificate included in proposal (if applicable)?**
- ❑ **ATTACHMENT B: Technical Proposal Certification of Compliance included in proposal?**
- ❑ **ATTACHMENT I: Cost Proposal Certification of Compliance included in proposal?**
- ❑ **Insurance documents received?** \_\_\_\_\_ (date requested) \_\_\_\_\_  
(date received)
- ❑ **If performance measurements weren't included in the RFP, are they included in the Negotiated Points? If they were included in the RFP, bring them forward in the contract for easy reference.**
- ❑ **Vendor review and signature of contract**
- ❑ **Agency review and signature of contract**
- ❑ **DAG review and signature of contract**
- ❑ **Approval from agency head to issue NOA**
- ❑ **Prepare for Public Information Requests by scanning the Public Record copies of the proposals and filing them in an electronic folder marked "Public**

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**Records’’. Make a PDF copy of the Consensus Score Sheet and place it in this folder as well.**

- CETS entry completed and approvals received.**
- Contract Manager approval applied in CETS.**

**Things to be completed after a CONTRACT is sent to Budget:**

- Notice of Award and appeal letters issued.**
- Recycle extra copies of the non-confidential parts of the proposals and shred the confidential parts.**

**Things to do after a CONTRACT has been approved:**

- Notify vendor that contract was approved.**
- Plan Kick-off Meeting**