

## Request for Bid (RFB) Check List - RFB # \_\_\_\_\_

	Description	Handled By	Estimated Business Days	Targeted Completion Date	Completed
<b>1. Identify Need</b>					
	- Is this a New or Existing Procurement? ▪ If existing what is the current contract number?	Agency	0 days	3/16/2018	New <input type="checkbox"/> Existing <input type="checkbox"/>
	- Is this a software purchase? If yes, can it be purchased using the Value-Added Reseller (VAR) contract?	Agency	0 - 3 days	3/21/2018	Yes <input type="checkbox"/> No <input type="checkbox"/>
	- If it's not a software purchase, is there an existing contract that can be used?				Yes <input type="checkbox"/> No <input type="checkbox"/>
	- Decide if the procurement is a Commodity or a Service <b>AND</b> create a timeline based on the target contract start date.	Agency/CAPS	0 days	3/21/2018	Service <input type="checkbox"/> Commodity <input type="checkbox"/>
<b>2. Develop RFB</b>					
	<b>Procurement Plan: Services Only, <a href="#">PRO-A-4</a></b>				Yes <input type="checkbox"/> No <input type="checkbox"/>
	- Complete Procurement Plan and send, via email, to Procurement Specialist	Agency	0 - 4 days	3/27/2018	<input type="checkbox"/>
	- Sends completed Procurement Plan to Bureau of Procurement Office	CAPS	0 days	3/27/2018	<input type="checkbox"/>
	- Receives approved or denied Procurement Plan	CAPS	7 - 10 days	4/10/2018	<input type="checkbox"/>
	<b>Cost Benefit Analysis (CBA): Services Only, <a href="#">PRO-I-15</a></b>				Yes <input type="checkbox"/> No <input type="checkbox"/>
	- Complete CBA and send, via email, to Procurement Specialist	Agency	0 - 5 days	4/17/2018	<input type="checkbox"/>
	- Sends completed CBA to Bureau of Procurement Office	CAPS	0 days	4/17/2018	<input type="checkbox"/>
	- Tracking Number	Agency	0 days	4/17/2018	<input type="checkbox"/>
	<b>Request for Bid Document and Cost Sheet Preparation</b>				
	- Purpose and Scope	Agency	10 - 15 days	5/8/2018	<input type="checkbox"/>
	- Bidder Qualifications				
	- Mandatory Specifications (Technical Requirements, Performance and Support Requirements, etc.)				<input type="checkbox"/>
	- Any Special Terms and Conditions				<input type="checkbox"/>
	- Cost Sheet				<input type="checkbox"/>
	- Compile list of Potential Bidders	Agency	0 - 3 days	5/11/2018	<input type="checkbox"/>
	- Bidder Outreach	CAPS	0 - 5 days	5/18/2018	<input type="checkbox"/>
	- RFB Document and Cost Sheet entered into Strategic Sourcing	CAPS	12 - 15 days	6/8/2018	<input type="checkbox"/>
	- Collaboration/Review of Procurement Specialist questions and concerns	Agency/CAPS	10 - 12 days	6/26/2018	<input type="checkbox"/>
	- RFB Document and Cost Sheet Finalized	Agency/CAPS	0 days	6/26/2018	<input type="checkbox"/>
	- Peer Review	CAPS	3 - 5 days	7/3/2018	<input type="checkbox"/>
	- RFB Section Chief Review	CAPS	10 days	7/17/2018	<input type="checkbox"/>
	▪ Additional Questions and Concerns Reviewed (as needed)		3 - 5 days	7/24/2018	<input type="checkbox"/>
	- Agency approval to post to eSupplier	Agency	0 - 5 days	7/31/2018	<input type="checkbox"/>
	- RFB Posting to eSupplier (total time posted 4 - 8 weeks)	CAPS	0 days	7/31/2018	<input type="checkbox"/>
<b>3. Issue &amp; Manage RFB</b>					
	- Creation of Amendments	CAPS	1 day	8/1/2018	<input type="checkbox"/>
	- Answer Questions received	Agency	0 - 5 days	8/8/2018	<input type="checkbox"/>

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	- Answers reviewed by Section Chief Additional questions & concerns reviewed (as needed)	CAPS	3 - 5 days	8/15/2018	<input type="checkbox"/>
	- Post to eSupplier/Bidder Communication	CAPS	0 days	8/15/2018	<input type="checkbox"/>
	▪ If multiple rounds of questions, repeat a) - d)	CAPS	1 - 10 days	8/29/2018	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>4.</b>	<b>Review &amp; Award</b>				
	<b>Review for completeness</b>				
	- Do Bidders meet all Bidder Qualifications?	CAPS	1 day	8/16/2018	<input type="checkbox"/>
	- Do Bidders meet all Mandatory Requirements?				<input type="checkbox"/>
	- Do Bidders provide all required documentation (DOA forms, supporting documents, etc.)?				<input type="checkbox"/>
	- Do Bidders provide a completed Cost Sheet?				<input type="checkbox"/>
	- Do Bidders take any exceptions to the Special Terms and Conditions?				<input type="checkbox"/>
	- Clarifications	CAPS	0 - 5 days	8/23/2018	<input type="checkbox"/>
	- Reference Checks	Agency	0 - 5 days	8/30/2018	<input type="checkbox"/>
	<b>Cost Evaluation</b>				
	- Cost Abstract created	CAPS	1 - 2 days	9/3/2018	<input type="checkbox"/>
	<b>Eligible/Ineligibility Status Checks</b>				
	- Certification for Collection of Sales and Use Tax Ineligible Directory	CAPS	0 days	9/3/2018	<input type="checkbox"/>
	- WI Office of Contract Compliance Ineligible Vendor Directory	CAPS	0 days	9/3/2018	<input type="checkbox"/>
	- Federal Debarment List—if using Federal Funds	CAPS	0 days	9/3/2018	<input type="checkbox"/>
	<b>Administration Review (only occurs on Thursdays)</b>	<b>CAPS</b>	<b>5 - 10 days</b>	<b>9/17/2018</b>	<input type="checkbox"/>
	- Agency notified of Admin Review approval and Notice of Intent to award	CAPS	0 days	9/17/2018	<input type="checkbox"/>
	▪ Award, Non-Award, and Disqualification Letters sent to vendor(s)			9/17/2018	<input type="checkbox"/>
	- Document information identified as proprietary or confidential	CAPS	0 days	9/17/2018	<input type="checkbox"/>
	- Protest/Appeal Period (services only), <a href="#">PRO-I-13</a>	Agency	10 days	10/1/2018	<input type="checkbox"/>
<b>5.</b>	<b>Post-Award Activities</b>				
	- Contract Number/Transactional Contract	CAPS	1 day	10/2/2018	<input type="checkbox"/>
	- Ensure official procurement file is complete	CAPS	1 day	10/3/2018	<input type="checkbox"/>
	- Post award information in STAR	CAPS	0 days	10/3/2018	<input type="checkbox"/>
	- Contract	Agency	15 days	10/24/2018	<input type="checkbox"/>



