

Checklist for Formal Bid/Proposal Process

At a minimum, the following steps should be applied.

- Obtain and complete solicitation document according to bid or proposal type- IFB (Invitation for Bid) or RFP (Request for Proposal). Sample IFB template can be located on the School Nutrition Program webpage under Support & Services>Procurement at <https://snp.gadoe.org/CSS/Pages/Procurement.aspx>. This template contains the most current required contract provisions and language. Customize this template to identify award type (line item or bottom line), pricing (fixed price, fixed price plus mark-up, cost reimbursable, etc.), evaluation criteria scoring and any specific needs of the school system.
- If preparing a solicitation document without using the template, review IFB checklist to ensure that all required provisions are included for compliancy. Locate IFB checklist on the School Nutrition Program webpage located at link above.
- Prepare specification sheets for items being procured. *Brand* or *Equal* must always be listed on each item that includes a brand name. Relevant student taste testing documentation must be maintained on file to validate any *Brand Name* only entries.
- Post bid/proposal publicly on local school website, in the local newspaper, on school social media accounts and etc. for at least 30 days to allow for open and fair competition.
- Post bid/proposal on the Georgia Procurement Registry (www.doas.ga.gov) if solicitation is forecasted to be over \$100,000. Review instructions on how to post a bid on the Georgia Procurement Registry located on the School Nutrition Program webpage under Support & Services>Procurement at <https://snp.gadoe.org/CSS/Pages/Procurement.aspx>
- Answer any questions submitted by responders by deadline, as indicated in bid or proposal, and include answers in advertised solicitation through an addendum for all other potential responders to view.
- Receive bids/proposals by date, time and at specified location indicated in solicitation. Time and date stamp responses as soon as you receive them and document. Create a form/document to record the receipt of each one and maintain on file.
- Publicly open bids/proposals according to time, date, and location indicated in solicitation.
 - Review and evaluate, with a committee, the solicitation responses and submitted forms such as the specification sheets with prices and other required documents
 - Calculate the bottom line or line item aggregate cost to establish awarded bidder(s) meeting all terms and conditions of the solicitation.
 - IFB = Lowest price; firm fixed price contract with or without escalation/de-escalation
 - RFP = Most advantageous for school system with price bearing highest weighted factor; fixed price or cost-reimbursable contract
 - Maintain computer generated tabulation sheet or school system created tabulation score sheet with price comparisons on file indicating awarded items/awarded bidder(s).
- Notify successful bidder(s) of awarded items with an official letter/email and maintain on file.
- Notify non-award bidder(s) with an official letter/email and maintain on file.
- Obtain signed and dated solicitation from awarded vendor(s). Contract signature page must be signed and dated by both parties (School Food Authority and vendor) and maintained on file with the complete solicitation response for the duration of the contract and/or five years plus the current year.
- Review procurement videos in the Training Catalog located on the School Nutrition Program webpage under Development & Learning>Training Catalog at <https://snp.gadoe.org/PDL/Pages/Training-Catalog.aspx> for additional procurement guidance.