

A checklist series for managing your RFx / bid process

POST-PROJECT CHECKLIST

Project: _____ Your Name: _____

(A) Initial Vendor Document Compliance:

- ☐ All vendor submissions were time-stamped prior to closing date/time *
- ☐ Each submission matched the requirements (# of copies, types of files, overall structure); any deviations have been noted *
- ☐ Any addenda or changes to project requirements were acknowledged by the submitting vendor(s)
- ☐ If late submission(s) were accepted, each late submission has an approved and defensible justification for why it was accepted
- ☐ No purchasing staff or evaluators had access to or opened any vendor submissions prior to the close date/time *

(B) Disqualified Submissions:

- ☐ A clear reason is provided for each disqualified submission, and disqualification reasons were shared with the evaluation group *
- ☐ The person disqualifying submissions has the authority to do so *

(C) Qualified Submissions:

- ☐ Bid forms and other mandatory forms are completed and signed by an officer of the vendor company
- ☐ All mandatory criteria have been evaluated for each submission; any submissions that failed to meet mandatory criteria were disqualified *

(D) Vendor Collusion Prevention:

- ☐ No evidence exists that competing vendors discussed or collaborated on the project

- ☐ No prior business relationships existed among competing vendors that might have led to collusion
- ☐ No similarities between submission documents were found among competitive vendors (common spelling mistakes, style of writing, structure of the proposals, exact pricing, etc.)

(E) Evaluation Process:

- ☐ Each evaluator signed a Conflict of Interest waiver or similar before viewing submissions; any recused evaluator are removed from the project and prevented from accessing submissions
- ☐ Records exist that sealed documents were [unsealed](#) at a date and time in keeping with the project plan *
- ☐ Evaluators provided [defensible reasoning](#) for scoring judgments *
- ☐ Evaluator justifications are based exclusively on the submitted vendors' documents and not on any prior or external knowledge
- ☐ No evidence exists of Evaluators accessing [pricing documents](#) prior to the planned stage in which pricing was to be scored *
- ☐ Evaluator scores that lack consensus have defensible justifications for why they disagree with each other *
- ☒ All appropriate decision artifacts (scoring summaries, comments, etc.) have been preserved and summarized into an Executive Report or similar final document *

(F) Award & Debrief Process:

- ☐ Each participating vendor received notification of the award decision (either publicly or privately)
- ☐ Non-successful vendors were aware that they are entitled to a debrief by purchasing staff regarding their submission
- ☐ Non-successful vendors were debriefed (if desired) *

* = Bonfire easily and simply automates these activities for you

ABOUT THIS CHECKLIST: Use this checklist on any competitive procurement project (RFP, bid, tenders, etc.) to uncover any compliance issues relating to supplier evaluation, selection, and awarding. Use this checklist immediately after the project is completed and/or prior to an incoming audit. Feel free to edit it to fit your process.