**REQUEST FOR PROPOSAL CHECK-OFF LIST**

 All of these documents must be in the completed RFP file held by the State Procurement Bureau (SPB)

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|[ ]  **Request from Agency/End User to SPB** (Requisition, ITPR) |
|[ ]  List of Vendors from AgencyThe agency provides a list of suggested vendors to SPB. SPB adds vendors as necessary. |
|[ ]  Scope of Work, Offeror Qualifications, Cost Proposal, Evaluation Criteria, Draft ContractProvided by the agency to SPB for review. RFP content will not be changed by SPB without the approval of the agency. If an agency is requiring financial information as part of their Offeror Qualifications, the agency must identify the subject matter expert and the process they will use to evaluate the information. |
|[ ]  Posted in eMACSSPB posts all RFPs in the Montana Acquisition and Contracting System (eMACS). Agencies are not permitted to speak with the vendors regarding the RFP from this point forward until a contract has been awarded. SPB Contract’s Officer is the single point of contact. |
|[ ]  Pre-Proposal Conference and/or Site Survey Sign-In SheetThe agency is responsible for the setup of the pre-proposal conference. SPB shall provide a copy of the sign-in sheet. The conference must include a SPB Contracts Officer. |
|[ ]  **Response to Vendor Questions** (Q&A board in eMACS)The agency prepares the responses to questions submitted and submits them to SPB for review. SPB will post the answers to the Question and Answer Board in eMACS. |
|[ ]  Evaluation MatrixPrepared by SPB and provided to the agency for review and approval prior to receipt of proposals. |
|[ ]  Non-Disclosure and Conflict of Interest Certification Signed by all members of the evaluation committee, any consultants or subject matter experts and are collected and returned to SPB. |
|[ ]  Proposals ReceivedProposals are received in eMACS by the stated due date and time. After the inspection of proposals is complete and the contracts officer has verified no conflict of interest has arisen, all proposals will be disbursed to the evaluation committee for review and evaluation. |
|[ ]  Proposals InspectedA contracts officer inspects proposals for any claims of trade secret information. Contents and the accompanying affidavit are pulled out. Interested parties are not allowed to inspect these documents. |
|[ ]  List of Responding VendorsThis list is maintained in the eMACS Sourcing Event. |
|[ ]  All Meetings of the Evaluation CommitteeMeeting minutes are taken by the agency and kept as part of the official file. The agency is also responsible for designating a member of the evaluation team or another representative to record the scores and comments of the evaluation committee. All formal meetings of the evaluation committee must be recorded. |
|[ ]  Requests for Clarification/Refinement/DiscussionA complete record of all negotiations with the vendor (oral and written). Includes requests/questions from agency and responses from vendors. |
|[ ]  Recommendation of Award - Scoring, ExplanationThe agency prepares the final consensus scoring and notes document and submits it to SPB for concurrence. When evaluation of the RFP is complete, the agency submits all final copies to SPB. |
|[ ]  Notice of Intent to AwardThe Contracts Officer prepares the Notice of Intent to Award (NOIA) identifying the Apparent Successful and Unsuccessful Offerors and includes the final Evaluation Matrix. The NOIA is posted for 7-calendar days to allow for public review and involvement. |
|[ ]  **Letters to Vendors** Request for Documents Notice, No Award Letters are sent by SPB. Requests for Documents includes: Proof of Compliance with Workers’ Compensation Act, Certificates of Insurance required by contract, and Contract Security as necessary. |
|[ ]  **Negotiated Contract for Review** Once the final contract has been negotiated, it must be reviewed by SPB prior to signing - space on contract for contracts officer to approve negotiated items and contract language. SPB ensures no conflicting language between RFP and final contract. The final contract will be loaded into eMACS by SPB and routed for signatures via DocuSign (including agency contracts). |
|[ ]  Issue ContractThe issuance of a contract completes the RFP process. |
|[ ]  Confidential DocumentsSPB issues notice to Agency to shred/delete all confidential documents. SPB keeps the complete RFP response, including confidential documents, per SPB’s records retention policy. |
| The State Procurement Bureau will address any questions regarding the RFP process, including any requests to view files. All further communications regarding the awarded contract are between the contractor and the agency. |