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# CHECKLIST FOR PREPARING A BID

PROCUREMENT

December 2024

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## BEFORE YOU START

Here are a few things to consider before you start preparing your bid documents.

### 1. Every Bid is Unique

- Review and Understand Instructions
- Review and Understand Terms and Conditions
- Project Owner Identified is the **Only** Contact
- Review Procurement Timelines**

### 2. Mandatory Criteria

- Safety Requirements
- Bonding
- Insurance
- Certification or Experience

### 3. Writing Your Bid

- Review How Your Bid will be Evaluated
- Cross-reference Your Bid with the Evaluation Criteria (if applicable)

### 4. Tips

- Ask Questions**
- Don't Assume the Evaluation Team Knows You
- Identify Potential Risks or Problems and Provide Contingency Plans
  - Show Your Expertise
- Extensions Can be Requested
- Make Sure You Are Receiving Addenda
- Pay Attention To Timelines
- Submit **On Time**

**See Next Page for More Information**

## 1. Every Bid is Unique

Every procurement is unique, so read its bidding details carefully. Before you start preparing your bid, make sure to:

Review and make sure you understand the clauses, the instructions, if not, ask the Project Manager that is identified in that procurement document. They are the only person you should be in contact with regarding that bid.

Another thing to identify right away is the procurement timeline. There will be deadlines to submit questions, for the project team to make changes to the bid and issue Addenda, and to submit your final bid. It is helpful to note these dates in your calendar.

## 2. Mandatory Criteria

Before you start writing, figure out which criteria are Mandatory. These are usually evaluated on a pass/fail basis. If your bid fails to meet any of the Mandatory criteria, it will be considered non-compliant.

## 3. Writing Your Bid

Typically, each procurement document will explain how to organize your submission. It is important to follow the structure to ensure you have submitted all applicable information as well as for the Evaluation Team to properly conduct their reviews. If no format has been laid out, it is fair to assume any structure is allowable.

A few things you may be asked to include:

**Technical Information:** includes specifications; this is an opportunity to demonstrate your knowledge.

**Qualifications and Experience:** proposed personnel performing the work. Do not assume the purchasing entity knows your past work and experience. The Evaluation Team is not allowed to score on something that is not included in the bids.

**Work Plan:** include schedules and timelines; demonstrate your understanding of the requirements and how your firm would deliver the outcomes.

**Financial and Pricing Information:** provide detailed breakdowns of the quoted price in terms of its cost elements.

## 4. Tips

**The best way to touch base with the Project Manager is to Ask Questions.** The Project Manager typically prefers email communication, in order to keep a record of all incoming inquiries.

When reviewing the scope of work within the bid document, Identify Potential Risks they may not have considered and Provide Contingency Plans to demonstrate your expertise. If a timeline seems tight, you can always ask for an extension. It is very important to make sure you are getting responses via Addenda, that is an official change to the original bid document.

Finally make sure to read the submission instructions. They may vary from one procurement to another.