

## Section 6F: Solicitation Checklist

6F.690 (2001-12-10) Before preparing a bid solicitation, the contracting officer should ensure that the following items have been considered. Relevant information is then to be included in the bid solicitation.

- (a) **Statement of work:** define the work to be done or the products to be acquired in clear and concise terms. If a requirement cannot be clearly defined, indicate the objectives and performance criteria to be met, and the evaluation criteria to be used.
- (b) **Technical requirements:** ensure that adequate technical/performance specifications (or purchase description) are included, and that mandatory requirements are clearly defined.
- (c) **Trade references:** "brand name or equal" type of purchase description should not be used, unless no other specification is available.
- (d) **Appropriate action:** determine whether a requirement can be fulfilled from an existing Standing Offer. Ensure that the most efficient and effective procurement strategy is being followed.
- (e) **Evaluation criteria:** evaluation criteria, and their relative weighing/importance, must be clear, and the evaluation process and team, if applicable, defined. Indicate whether, and under what conditions, alternatives will be considered.
- (f) **Contractor selection:** determine the basis on which a contractor will be selected. If the intent is to award the contract on the basis of best value, the criteria and the methods that will be used to determine the best value should be stated.
- (g) **Sourcing:** ensure that the application of trade agreements has been verified, and that government sourcing procedures and departmental policies have been reviewed.
- (h) **Industrial Security requirements (Personnel or organization):** ensure that industrial security requirements have been defined adequately and reviewed by Canadian and International Industrial Security Division.
- (i) **Employment equity:** for procurements valued at more than \$200,000, contracting officers must remind bidders of the potential application of the Federal Contractors Program for Employment Equity.
- (j) **Pricing factors:** determine all factors which will affect price (e.g. duties, taxes, transportation and installation costs). Identify potential currency issues.
- (k) **Terms and conditions:** include applicable General Conditions and Supplemental General Conditions. Consult Legal Services for any deviations from General or Supplemental General Conditions.
- (l) **Standard/special clauses:** use, whenever possible, standard clauses as detailed in the Standard Acquisition Clauses and Conditions (SACC) Manual. If a situation arises for which a standard clause does not exist or an existing clause requires changes, ensure that the Crown's interests are protected. Consult Legal Services when necessary.
- (m) **Intellectual property:** ensure that ownership of intellectual property has been dealt with.
- (n) **Employer-employee relationship:** ensure that potential employer-employee

relationships are dealt with.

- (o) **Basis of payment:** determine the most appropriate basis of payment.
- (p) **Funding level:** consider, when issuing a request for proposal, whether or not to include an estimated or maximum funding level (e.g. when a requirement involves an investigation or a study, the depth of the investigation or study will often depend upon the funds available).
- (q) **Financial security:** specify, when applicable, the type, combination and amount of financial security required.
- (r) **Delivery:** define delivery requirements. Avoid statements such as "as soon as possible" which could cause unjust rejection of bids for unsatisfactory proposed delivery.
- (s) **FOB point:** specify the FOB (free on board) or FAS (free alongside ship) or FAF (free alongside flight) point, as applicable.
- (t) **Quality assurance:** include the government quality assurance required, such as inspection, process control, acceptance criteria, etc.
- (u) **Multi-item requirements:** when appropriate, emphasize the prerogative to award the contract on either an aggregate or partial basis.
- (v) **Preparation instructions:** determine the desired format and any special instructions for the presentation of bids. The evaluation process will be simplified if proposals are presented using the same format.
- (w) **Bidding period:** allow sufficient time for the preparation and return of bids, taking into account mandatory requirements under international agreements, the complexity and urgency of the requirement, the necessity for suppliers to contact subcontractors, and the geographical location of suppliers.
- (x) **Bid validity period:** ensure that the proposed bid validity period allows sufficient time for the bid evaluation process and the contract approval process.
- (y) **Bidders' conference or site visit:** the need for, and requirement for potential bidders to attend, a bidders' conference or site visit must be established.
- (z) **Closing date and time:** indicate the closing date and time clearly. The normal closing time is 2 p.m. local time at the place of closing on the established date.
- (aa) **Form of bids:** contracting officers must ensure that instructions for the submission of bids are not open to misinterpretation.
- (ab) **Receipt of bids:** all tenders and competitive proposals and quotations for requirements estimated to exceed \$5,000 are to be directed to a designated bid receiving area.
- (ac) **Public opening:** only Invitations to Tender are opened publicly. State the time, date and place where tenders will be opened. The public tender opening time is the specified bid closing time.
- (ad) **Approvals:** ensure that all required approvals have been obtained.
- (ae) **Controlled Goods:** ensure that any "controlled goods" have been identified and adequate security precautions are in place for their safeguard and transfer.

