

SOLICITATION CHECKLIST

DATE/TIME MANAGER RECEIVED _____
 DATE/TIME MANAGER ASSIGNED TO AGENT: _____
 DATE/TIME SPECIALIST/COORDINATOR/SENIOR BUYER RECEIVED: _____
 DATE/TIME ADMINISTRATIVE SUPERVISOR RECEIVED: _____
 DATE /TIME SENIOR OFFICE SUPP ASST RECEIVED: _____

INVITATION TO BID/REQUEST FOR PROPOSAL/REQUEST FOR LETTERS OF INTEREST (ITB/RFP/RLI) (Circle one)

1. Specification #PD _____ CAPITAL OR NON-CAPITAL PROJECT (CIRCLE ONE)
2. Project Title: _____
3. Project Funded with Escambia County Community Block Grant Support? ____ Yes ____ No
 If yes, then use the legal notice especially prepared for CDBG Projects together with the Federal boilerplate section.
4. Advertise Date(s) in Pensacola News Journal: _____ / _____
 (If twice, enter 2nd date to be advertised)

Note to Senior Office Support Assistants (SOSA's) Before creating Legal Ad – Enter all meetings/openings in Outlook to ensure there are no scheduling conflicts.

5. Is there a Pre-Solicitation Conference: Yes ____ No ____ Is it Mandatory?: Yes ____ No ____
 Time CST/CDT (Circle One)/Date: _____
 Location: _____
 Date Room was Reserved (if other than 11.407): _____ w/whom: _____
 Contact Info: _____
6. **Received Until: _____ CST/CDT, _____
 (Time) (Day of Week) (Month Date Year)
7. Opened at _____ CST/CDT, _____
 (Time) (Day of Week) (Month Date Year)

***Note: F.S. 125.35.(1)(G) Sales of all County property must be advertised two (2) times, i.e. land, off-road equipment, etc.**

Contracts for construction of roads and drainage projects must be advertised two (2) times. Per F.S. 336.444 "...at least once each week for two (2) consecutive weeks.

****Note: F.S. 255.0525 Advertising Construction Documents:**

<u>Projected Construction Cost</u>	<u>Required Days Between Advertisement & Solicitation Opening</u>
\$ 0 - 200,000	14
\$ 200,001 - 500,000	21
\$ 500,001 +	30

Pre-Solicitation Conferences must be a minimum of five (5) days after advertising date if advertised once; or anytime after second advertisement if advertised twice.

8. Memo to County Administrator w/Legal Ad. for owner's representative - Standard Form Memo 1b. (ITB) _____
 Person & Dept. to be listed on memo as working with: _____

Address of Dept.: _____
 Phone & Fax #: _____

9. Committees and memos for Request for Proposal (RFP) and Request for Letters of Interest (RLI)
 If any additional members are requested by the Office of Purchasing and added after the initial request, please add them.

<u>Committee Members:</u>	<u>Key Resource People by Name and Title:</u>
(Admin. Designee) _____	_____
(County Attorney _____ advisory capacity)	_____
(Purchasing Chief's Designee _____ ex-officio, chair)	_____
(Clerk's Designee _____ only when specifically appointed in an advisory capacity)	_____

Memo to County Administrator w/Legal Ad.

- | | |
|--------------------------|---------------------------|
| 1. ____ w/o Owners Rep. | 1a. ____ with Owners |
| 2. ____ w/o Owners Rep. | 2a. ____ with Owners Rep. |
| 1c. ____ w/o Owners Rep. | 1d. ____ with Owners Rep. |
| 2c. ____ w/o Owners Rep. | 2d. ____ with Owners Rep. |

Rep.

- Deputy Finance Director Copy of Memo to Cty. Admin. w/Legal Ad
- Memo to Cty. Admin. w/Legal when the Board acts as the Proposal Review or Selection Committee
- Deputy Finance Director's Copy of Memo to Cty. Admin. w/Legal Ad. when the Board acts as the Proposal Review or Selection Committee

- Department Director Copied w/Legal Ad

*****Note: All Deputy Finance Director memos 2, 2a, 2c, or 2d are sent only when the Clerk of the Court is appointed by the County Administrator to serve in an advisory capacity.**

10. Purchasing Specialist's/Coordinator's Estimated number of CD's to be created: _____

Base estimate on total number to be provided to prospective offerors. Regarding Request for Proposal or Requests for Letters of Interest, please list Proposal or Selection/Negotiation Committee members and distribute their solicitation packages once the memo to the County Administrator is returned approving the recommended Committee members, appointing his designee to the Committee and designating his authority as Owners (County) Representative, as well as the memo from the Deputy Finance Director appointing her/his designee to the Committee. Please copy all Committee members of any addenda, Committee briefings, etc.

GENERAL INFORMATION

REQUISITION # _____

SCOPE OF WORK SUMMARY PROVIDED BY THE ARCHITECTURAL AND ENGINEERING FIRM OR THE USER DEPARTMENT: YES ____ NO ____ NA ____

A&E FIRM _____

CONTRACTOR LICENSE REQUIREMENTS PROVIDED BY THE ARCHITECTURAL AND ENGINEERING FIRM OR THE USER DEPARTMENT:

YES ____ NO ____ NA ____

IF YES LIST THEM: _____

PROCESS AND ATTACH COMPLETED FORM OF0105 _____ "ARCHITECT/ENGINEER, CHECKLIST FOR INVITATION TO BID REQUEST FOR PROPOSAL"

SCOPE OF WORK SUMMARY AND CONTRACTOR LICENSE REQUIREMENTS REVIEWED BY ESCAMBIA COUNTY BUILDING INSPECTIONS DEPARTMENT/CONTRACTOR LICENSING DIVISION: YES ____ NO ____ NA ____

RESULTS OF THEIR REVIEW: COMPLIANT _____ NOT COMPLIANT _____

PROCESS AND ATTACH COMPLETED FORM LETTER OF0115 "LICENSE CONFIRMATION OF COMPLIANCE" WITH "PROJECT SCOPE OF WORK SUMMARY AND LICENSE REQUIRED."

NOTE: SPECIFY "SCOPE OF WORK" SUMMARY, LICENSING, CERTIFICATION, AND/OR REGISTRATION REQUIREMENTS IN "SPECIAL TERMS AND CONDITIONS".

* PERMITS & FEES PROVIDED ON COUNTY CONSTRUCTION PROJECTS: YES ____ NO ____ N/A ____

PROCESS AND ATTACH FORMS F0072 AND F0073 IN ACCORDANCE WITH POLICY AND PROCEDURE P.P.030 REQUISITION PROCEDURE III G.

* PROJECT FUNDED WITH ESCAMBIA COUNTY COMMUNITY BLOCK GRANT SUPPORT: YES ____ NO ____ N/A ____

IF CHECKED YES, USE THE LEGAL AND INSTRUCTION S TO BIDDERS PREPARED FOR CDBG PROJECTS.

• SOLICITATION LIST SOURCING: ____ APS ____ YELLOW PAGES ____ CLIENT DEPT. ____ OTHER

* PRE-QUALIFICATION PROCESS: YES ____ NO ____ N/A ____

REQUEST FOR QUALIFICATIONS (RFQ)

* LIMIT THE ACCEPTANCE OF OFFERORS TO THOSE DEEMED QUALIFIED IN THE RFQ: YES ____ NO ____

NOTE: SPECIFY LICENSING, QUALIFICATIONS, EXPERIENCE, REFERENCES, FINANCIAL STABILITY, AND OTHER REQUIREMENTS IN A SPECIAL TERMS & CONDITIONS@ OR THE CONTRACT EXHIBITS.

* POST-QUALIFICATION PROCESS: YES ____ NO ____ N/A ____

* ANY OFFEROR MAY RESPOND TO THE SOLICITATION: YES ____ NO ____ N/A ____

NOTE: SPECIFY LICENSING, QUALIFICATIONS, EXPERIENCE, REFERENCES, FINANCIAL STABILITY, AND OTHER REQUIREMENTS IN A SPECIAL TERMS & CONDITIONS@ OR THE CONTRACT EXHIBITS.

* USING SAMPLE STANDARD CONTRACT: YES ____ NO ____ N/A ____ WHICH FORM: A B C D E F G (CIRCLE ONE)

STANDARD CONSTRUCTION CONTRACT AGREEMENT DECLARATION: N/A ____

SECTION 1B: CONTRACT DOCUMENTS: NUMBER OF _____ SETS OF THE CONTRACT DOCUMENT

SECTION 5: A. SUBSTANTIAL COMPLETION _____ CALENDAR DAYS

NOTE: INDICATE COMPLETION DATES & LIQUIDATED DAMAGES ON BID/PROPOSAL FORM

FULLY (FINAL) COMPLETION _____ CALENDAR DAYS

B. LIQUIDATED DAMAGES: \$ _____ EACH CALENDAR DAY

SECTION 6: EXHIBITS INCORPORATED BY REFERENCE

EXHIBIT H: _____

EXHIBIT I: _____

OTHER EXHIBITS? _____

SECTION 7: NOTICES TO COUNTY:

ATTN: _____

EXHIBIT A: GENERAL TERMS AND CONDITIONS

SECTION 4.4: _____ COPIES OF APPLICATION FOR PAYMENT

SECTION 21: WARRANTY _____ (TIME)

F.D.O.T. INTERCONNECT PERMIT REQUIRED: YES ____ NO ____ IF YES, ADD TO SPECIAL TERMS AND CONDITIONS.

SPECIAL TERMS AND CONDITIONS CHECKLIST

Instructions to Offerors

- | | |
|---|---|
| <p><input type="checkbox"/> 1. <u>General Information</u></p> <p><input type="checkbox"/> 2. <u>Bid Surety</u> (Circle one ___ % or \$ _____)</p> <p><input type="checkbox"/> 3. <u>Bonds</u>
3.01 Performance and Payment Bonds
(___ may ___ shall)
(___ separate Performance and Payment a Performance Bond)
(100% of the dollar value of the award ___ \$ _____)</p> <p><input type="checkbox"/> 3.02 Fidelity Bond</p> <p><input type="checkbox"/> 4. <u>Procurement Questions</u>
(_____)
(_____)</p> <p><input type="checkbox"/> 5. <u>Bid Forms</u></p> <p><input type="checkbox"/> 6. <u>Pre-Solicitation Conference</u></p> <p><input type="checkbox"/> 7. <u>Pre-Solicitation Conference and Walkthrough</u></p> <p><input type="checkbox"/> 8. <u>Inspection of Facilities</u></p> <p><input type="checkbox"/> 9. <u>F.O.B. Point</u>
9.01
9.02
9.03
9.04</p> <p><input type="checkbox"/> 10. <u>Delivery</u>
10.01
10.02
10.03
10.04
10.05</p> <p><input type="checkbox"/> 11. <u>Liquidated Damages</u></p> <p><input type="checkbox"/> 12. <u>Compliance with Occupational Safety and Health</u></p> <p><input type="checkbox"/> 13. <u>Safety Regulations</u></p> <p><input type="checkbox"/> 14. <u>Codes and Regulations</u></p> <p><input type="checkbox"/> 15. <u>Payment</u>
15.01
15.02
15.03</p> <p><input type="checkbox"/> 16. <u>Information and Descriptive Literature</u></p> <p><input type="checkbox"/> 17. <u>Brand/Manufacturer Referenced</u></p> <p><input type="checkbox"/> 18. <u>Equivalents/Samples</u>
18.01
18.02</p> <p><input type="checkbox"/> 19. <u>Samples/Demonstrations</u></p> <p><input type="checkbox"/> 20. <u>Equipment/Service</u></p> <p><input type="checkbox"/> 21. <u>Assembly and/or Placement</u></p> <p><input type="checkbox"/> 22. <u>Warranty</u> (_____ Years)</p> <p><input type="checkbox"/> 23. <u>Manuals</u></p> <p><input type="checkbox"/> 24. <u>Required Reports</u></p> <p><input type="checkbox"/> 25. <u>Measurements</u></p> <p><input type="checkbox"/> 26. <u>Drawings</u>
26.01
26.02
26.03</p> <p><input type="checkbox"/> 27. <u>Packaging/Shipping Labels</u></p> <p><input type="checkbox"/> 28. <u>Verification of Numbers Quantity</u></p> <p><input type="checkbox"/> 29. <u>Return of Art Work</u></p> <p><input type="checkbox"/> 30. <u>Palletize</u></p> <p><input type="checkbox"/> 31. <u>Debris</u></p> | <p><input type="checkbox"/> 32. <u>Protection of Property/Security Additional</u></p> <p><input type="checkbox"/> 33. <u>Emergency Service</u></p> <p><input type="checkbox"/> 34. <u>Permits</u></p> <p><input type="checkbox"/> 35. <u>Utilization of MBE/WBE/DBE Firms</u></p> <p><input type="checkbox"/> 36. <u>Compliance with Governing Laws and Regulations</u></p> <p><input type="checkbox"/> 37. <u>Federal Compliance Certifications</u></p> <p><input type="checkbox"/> <u>Contract Information</u></p> <p><input type="checkbox"/> 38. <u>Contract Term/Renewal/Termination</u></p> <p><input type="checkbox"/> 39. <u>Contract Term/Renewal</u></p> <p><input type="checkbox"/> 40. <u>Evaluation of Options</u></p> <p><input type="checkbox"/> 41. <u>Option to Extend the Term of Contract</u></p> <p><input type="checkbox"/> 42. <u>Interim Extension of Performance</u></p> <p><input type="checkbox"/> 43. <u>Pricing</u></p> <p><input type="checkbox"/> 44. <u>Price Adjustment</u>
44.01
44.02</p> <p><input type="checkbox"/> 45. <u>Purchasing Agreements w/other Gvmt Agencies</u>
45.01
45.02
45.03</p> <p><input type="checkbox"/> 46. <u>Changes-Service Contracts</u></p> <p><input type="checkbox"/> 47. <u>Termination</u></p> <p><input type="checkbox"/> 48. <u>Ordering</u></p> <p><input type="checkbox"/> 49. <u>Qualification</u></p> <p><input type="checkbox"/> 50. <u>Licenses, Certifications, Registrations</u></p> <p><input type="checkbox"/> 51. <u>Permits</u></p> <p><input type="checkbox"/> 52. <u>Term of Offer</u></p> <p><input type="checkbox"/> 53. <u>Award</u>
53.01
53.02
53.03
53.04
53.05
53.06
53.07
53.08</p> <p><input type="checkbox"/> 54. <u>Termination</u></p> <p><input type="checkbox"/> 55. <u>Termination (Services)</u></p> <p><input type="checkbox"/> 56. <u>Termination (Public Records Request)</u></p> <p><input type="checkbox"/> 57. <u>As Specified</u></p> <p><input type="checkbox"/> 58. <u>Quantity</u>
58.01
58.02</p> <p><input type="checkbox"/> 59. <u>Additional Quantities</u>
59.01
59.02</p> <p><input type="checkbox"/> <u>Insurance Requirements</u></p> <p><input type="checkbox"/> 60. <u>Standard Insurance Requirements and Certificates</u>
60.01
60.02</p> <p><input type="checkbox"/> 61. <u>Florida Department of Transportation-Insurance Requirements</u></p> <p><input type="checkbox"/> 62. <u>Indemnification</u></p> <p><input type="checkbox"/> 63. <u>Trench Safety Act (Construction)</u></p> <p><input type="checkbox"/> 64. <u>Bonding Financial Capacity (may shall)</u></p> <p><input type="checkbox"/> 65. <u>Written Questions no later than _____</u></p> |
|---|---|

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