

APPENDIX C – SOLICITATION/CONTRACT TIMELINE
NOTE: Solicitation means Invitation for Bid (IFB) or Request for Proposals (RFP)

Instructions for Use

1. This sample timeline may be used for sealed bid or negotiated procurements. See the Request for Proposals Procurement Toolkit for guidance concerning the Procurement Plan and timeline. When appropriate, use this format for developing the procurement timeline, which must accompany the signed Procurement Plan (Form DOA-3720) submitted to WisDOT for pre-release approval of the solicitation.
2. When establishing dates for events that require WisDOT approval, consult with WisDOT to ensure adequate time for such review and approval.
3. Depending upon the circumstances of the procurement, some blocks may be left unfilled. Be sure to show at least 30 days for the procurement to be posted on VendorNet.
4. Retain this Timeline, along with the Procurement Plan, in its appropriate place within the Procurement History File.

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EVENT	SCHEDULED DATE	COMPLETION DATE	COMMENTS/NOTES
Prepare the solicitation/contract timeline.			Ensure that all parties with a vested interest in the procurement agree with the timeline (this includes WisDOT).
Subrecipient registers with Wisconsin VendorNet, if not already registered.			Register at: http://vendornet.state.wi.us/vendornet/default.asp VendorNet is free and meets FTA requirements to stimulate competition. Local advertisement is permissible but is not adequate as the single means to advertise the procurement.
Review procurement policies and procedures applicable to either Invitation for Bid (IFB) procurements (sealed bids) or Request for Proposals (RFP) for negotiated procurements.			Refer to the appropriate Procurement Toolkit and follow established Federal and State procurement rules to ensure maximum program funding assistance.
Ensure adequate funding sources.			Document the source of funds for the instant procurement as well as for any option periods.
Develop appropriate procurement specifications.			Refer to the appropriate section of the IFB or RFP Procurement Toolkit. Write a specification that describes the procurement needs completely, clearly, and accurately and which will facilitate “full and open” competition.
Prepare the Procurement Plan.			Refer to the appropriate section of the IFB or RFP Procurement Toolkit. The Procurement Plan should address the title of the procurement, method of procurement, contract term (including any option periods), estimated annual costs, how the procurement will be advertised to maximize “full and open” competition, any special provisions, proposed evaluation factors, and technical evaluation team members (if applicable).
Develop an Independent Cost Estimate (ICE).			Refer to the appropriate section of the IFB or RFP Procurement Toolkit. FTA requires that the ICE be developed before bids or offers are received. The ICE is only one tool that must be used to perform the required cost or price analysis. Prior year costs, adjusted for inflation, quantity changes, etc., may help in developing estimated costs for the instant procurement.
Develop appropriate solicitation language that addresses the factors that will be considered for award. Ensure that any technical evaluation team members understand their responsibilities, (including safeguarding source selection information as defined in the Procurement Toolkit).			Refer to the appropriate section of the IFB or RFP Procurement Toolkit.
	SCHEDULED	COMPLETION	

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Establish the date for a Pre-Bid or Pre-Proposal Conference, if needed.			Refer to the appropriate section of the IFB or RFP Procurement Toolkit. Requires prior WisDOT approval. Identify the date and location for the Pre-Bid Conference in the IFB.
Prepare solicitation boilerplate, any special provisions, and the bidders mailing list (source list).			Refer to the appropriate section of the IFB or RFP Procurement Toolkit. Use the sample solicitation templates included with the respective Procurement Toolkit, appropriately filled out and any changes to the boilerplate highlighted to facilitate WisDOT review. Include applicable State and Federal clauses and any required certifications. Demonstrate that maximum competition is being sought.
Submit the solicitation, bidders mailing list, Procurement Plan and timeline (if required) to WisDOT for review and approval.			Solicitation may not be released until reviewed and approved by WisDOT.
After receiving WisDOT approval, release the solicitation. Initiate advertisement on VendorNet. Post the solicitation on VendorNet.			For optimum competition, establish a closing date at least 30 days after solicitation release. Proof of advertising should be retained for the Procurement History File.
Finalize Pre-Bid or Pre-Proposal Conference arrangements.			If WisDOT has approved such conference, arrange for the location and proper recording of conference procedures and events.
Last day for potential bidders or offerors to submit written questions for consideration and answer.			Present Questions and Answers (Q&A) at the Pre-Bid or Pre-Proposal Conference, if held. If held, properly record additional Q&A that arise during the conference.
Prepare written answers to all questions raised. Draft appropriate solicitation amendment. Confirm original closing date or extend closing date as necessary.			Ensure that WisDOT reviews all proposed solicitation amendments. Confirm the original closing date or if the amendment makes any significant changes to the solicitation, extend the closing date to allow potential bidders or offerors to consider the impact of any changes that may potentially impact bidders. Ensure that all potential bidders or offerors acknowledge receipt of all amendments when bids/offers are submitted. Retain all Q&A and solicitation amendments for the Procurement History File.
Solicitation closing date.			Record the date and time of all bid or proposal packages as they are received. Accept no late bids or proposals. Safeguard all bids/offers received. Follow appropriate bid opening procedures and immediately examine all bids for mistakes.
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Begin bid/offer evaluations.			<p>Determine bidder “responsiveness” using the guidelines in the IFB Procurement Toolkit.</p> <p>For negotiated procurements, identify any exceptions noted by offerors in their proposals and determine whether such exceptions are acceptable to the customer.</p> <p>Use only the evaluation factors identified in the solicitation. If options are being solicited, evaluate all options.</p>
Address any clerical or other mistakes discovered during the evaluation phase.			Refer to the IFB Procurement Toolkit and work closely with WisDOT in resolving mistakes identified or alleged before award.
Complete bid evaluations.			Properly document the results of bid evaluations and/or any technical evaluations and identify the apparent “responsive” low bidder.
Determine “price reasonableness” of the apparent low, responsive bidder’s price.			Refer to appropriate section of the IFB or RFP Procurement Toolkit.
Determine “responsibility” of the apparent responsive low bidder or of the apparent successful offeror.			Refer to the appropriate section of the IFB or RFP Procurement Toolkit. As a minimum, check the bidder’s/offeror’s references and the Excluded Parties List. Document the file.
Finish preparing the Procurement History File.			Use the recommended file checklist in the IFB or RFP Procurement Toolkit.
Submit the proposed award and all supporting documentation for all required approvals.			Obtain WisDOT approval to proceed with the Notice of Intent to Award” before obtaining any required local approvals.
Receive final approval and issue “Notice of Intent to Award.”			Handle all queries concerning review of procurement information, intent to protest, and protests in accordance with local and State regulations. Notify WisDOT and the Federal Transit Administration of any protest.
Contract award date.			Allow sufficient time after posting the “Notice of Intent to Award” and before contract award to allow for filing of any intent to protest or protest.
Extend current contract, if needed.			For contract services, if a protest will impact the new contract start date, consider extending the currently existing contract to provide continuation of services until such time that the protest is resolved (but only if the current contract allows for such extension and such extension is approved by WisDOT and local authorities).
Contract start date.			All subsequent option years will be exercised in accordance with existing contract terms and conditions and begin January 1 st of each successive year. Conduct market research to affirm “price reasonableness” of option year prices prior to exercising the option.