BID EVALUATION CHECKLIST
IS CONTRACTOR RESPONSIBLE?

This form is not all inclusive. Add requirements as necessary

PROJECT NAME: _____________________________________________
PROJECT NO.: _____________________________________________
CONTRACTOR’S NAME: _______________________________________

During the Evaluation of the Bid, check the following for compliance:

_______ 1. Bonding Ability. The Surety's agent has verified that the Contractor has sufficient bonding capacity and will be issued Contract Performance and Payment Bonds.

_______ 2. Qualification. The Contractor provided information relative to required qualifications and meet the qualification required to complete the work.

_______ 3. Schedule. The Contractor has stated the firm is able to comply with the project schedule, taking into consideration all existing business commitments and projects in progress.

_______ 4. Ability. The Contractor has stated the firm has the ability, the necessary organization, and work experience, to perform the scope of work.

_______ 5. Financial. The Contractor provided information relative to his financial resources, and meets the requirements listed in Instructions to Bidders, Rider C, with regard to current assets over current liability in relation to the bid price.

_______ 6. References. The Contractor has provided references on successfully completed contracts. These references were contacted with the result that the referenced work experience was applicable to our project requirements, and that the work was performed to the satisfaction of the Owner.

Bid Evaluation Performed By: _________________________________ Date ______________________________

Engineering / Architectural Instructions For Facilities Projects
Chapter 2.5
Chapter 2 – Process of Construction Contract Procurement
Chapter 2.5 – The Bid Phase

Page 1 of 8
# BID EVALUATION CHECKLIST

**IS BID PROPOSAL RESPONSIVE?**

*This form is not all inclusive. Add requirements as necessary*

<table>
<thead>
<tr>
<th>ITEM</th>
<th>YES</th>
<th>NO</th>
<th>COMMENTS</th>
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<tbody>
<tr>
<td><strong>1. PROPOSAL FORM</strong></td>
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<tr>
<td>• Is Federal ID No. Provided?</td>
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<td>• Do Written Amounts Match Numbers?</td>
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<td>• Are All Base Bids &amp; Unit Price Blanks Filled?</td>
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<td>• Are Addenda Acknowledged?</td>
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<tr>
<td>• Is Proposal Signed &amp; Sealed?</td>
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<td><strong>2. CONTRACT COMPLIANCE</strong></td>
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<td>• Are Documents Notarized And Sealed?</td>
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<td><strong>3. NON-DISCRIMINATION</strong></td>
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<td>• Are Documents Signed?</td>
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<td><strong>4. MBE/WBE</strong></td>
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<td>• Is “Exhibit A” Filled Out Properly?</td>
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<td>• Is Additional Evaluation Necessary?</td>
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<td><strong>5. BUSINESS CERTIFICATION</strong></td>
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<td>• Are Documents Filled Out, Signed, &amp; Notarized?</td>
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<td><strong>6. BID BOND</strong></td>
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<td>• Are System Forms Used?</td>
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<td>• Is Bond Percentage Correct?</td>
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<tr>
<td>• Does Name &amp; Address Match Proposal?</td>
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<td>• Does Bond Date Match Or Follow Proposal Date?</td>
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<td>• Is Bond Signed &amp; Sealed By Both Surety &amp; Contractor?</td>
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<td>• Is Power Of Attorney Dated Correctly?</td>
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<td><strong>7. CERTIFIED CHECK OR BANK CASHIER’S</strong></td>
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<td>• Is A Check Used As Bid Guaranty?</td>
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<tr>
<td>• Is The Amount Correct?</td>
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Bid Evaluation Performed By: ___________________________ Date
PROFESSIONAL’S EVALUATION OF BIDS
CHECKLIST
Professional’s Responsibility For Bid Evaluation

In lieu of a Checklist
the following Sample Letter From Professional to University is provided.
This form is not all inclusive. Add requirements as necessary

[---professional’s letterhead---]

[---date---]

[---name of university---]
[---address of university ---]

Attention: [---contact person for university---]
Reference: Open-Ended Professional Design Services
    Contract No. [---###---]
Subject: Bid Verification for Project No. [---####---]
    [---project name---]

Dear [---contact person for university---]:
[---name of professional---] has reviewed the apparent low bids for the separate prime contracts and compared them to the project cost estimates prepared by [---name of professional---].

REVIEW OF APPARENT LOW BIDDERS

- For the General Construction Project, the apparent low bid of [---apparent low bid amount---] submitted by [---contractor’s name---] is above/below and within ___% of the estimate of [---professional’s construction estimate---].

- For the HVAC Construction Project, the apparent low bid of [---apparent low bid amount---] submitted by [---contractor’s name---] is above/below and within ___% of the estimate of [---professional’s construction estimate---].

- For the Plumbing Construction Project, the apparent low bid of [---apparent low bid amount---] submitted by [---contractor’s name---] is above/below and within ___% of the estimate of [---professional’s construction estimate---].

- For the Plumbing Construction Project, the apparent low bid of [---apparent low bid amount---] submitted by [---contractor’s name---] is above/below and within ___% of the estimate of [---professional’s construction estimate---].
EVALUATION
[---name of professional---] attributes the very competitive bids to the current economic situation and the timing of the bidding process.

VERIFICATION AND CONFIRMATION
[---name of professional---] has contacted each apparent low bidder to verify bid and confirm understanding of the scope of work. [---name of professional---] confirmed via phone with the following Contractors:

General Construction  [---contractor’s name---], [---name of contact---]
HVAC Construction  [---contractor’s name---], [---name of contact---]
Plumbing Construction  [---contractor’s name---], [---name of contact---]
Electrical Construction  [---contractor’s name---], [---name of contact---]

[---name of professional---] is satisfied that all Prime Contractors understand the scope of the project and will honor their respective bids.

RECOMMENDATION FOR AWARD
Based on the above information, the prices are found to be fair and reasonable and award is recommended to as follows:

General Construction  [---contractor’s name---]  [---project number---]  [---bid---]
HVAC Construction  [---contractor’s name---]  [---project number---]  [---bid---]
Plumbing Construction  [---contractor’s name---]  [---project number---]  [---bid---]
Electrical Construction  [---contractor’s name---]  [---project number---]  [---bid---]

Should you require any additional information, please contact me.

Sincerely,

[---name of professional---]

CC:  [---university staff---]
[---university staff---]
REQUEST FOR BIDDER’S INFORMATION
SAMPLE LETTER

[---university letterhead---]
[---date---]

[---contractor’s name---]
[---contractor’s address---]

Subject: Contractor’s Qualification Statement
Reference: [---name of project---]
[---contract number---]

Dear Sir:

As part of the process of evaluating your bid proposal for the above-referenced project, we request that you submit the following information to our office within 5 days from receipt of this letter:

1. **Contractor's Qualification Statement.** Provide all the information contained on AIA Document A305, Contractor's Qualification Statement. The Contractor may either submit the information on an AIA 305 Form or on a similar presentation with the information that is requested on the AIA 305 Form.

   *The American Institute of Architects (AIA) and the Associated General Contractors of America (AGC) have approved and recommended AIA Document 305 for use in evaluating the qualifications of Contractors.*

2. **Financial Statement.** Provide your firm’s most current annual Financial Statement.

3. **Schedule.** In your cover letter submitting the above documents, provide a statement indicating that you have taken into consideration all of your business commitments for the period of this project, and you will have no problem completing the project according to the schedule stated in the contract documents.

4. **Insurance.** Provide the local insurance company’s name, address, and phone number. Provide the agent’s name who has the Power of Attorney from the Surety to issue the Contract Bonds.

The requests for Items 1 and 2 are in accordance with the requirements listed in the Notice to Contractors and the Instructions to Bidders.

This request for information to be reviewed is only one of the procedures necessary to determine contractor responsibility and should not be interpreted as an award of contract.

If you should have any questions, please do not hesitate to call our office.

Thank you for your prompt attention to this matter.

Sincerely,

[---contract administrator---]