

SAMPLE Policy

Document the Process: Records Management

PURPOSE:

Describe documentation required in the bid process, contract, and protest (if applicable).

PROCEDURES:

1. Establish and maintain the bid file(s) which includes:
 - a. Cost analysis and approval to proceed with the procurement.
 - b. Documentation of advertisement.
 - c. Bid/proposal package.
 - d. List of individuals attending the bidder's conference (sign-in sheet).
 - e. Minutes of the bidders conference.
 - f. List of evaluation panel members.
 - g. Bids received.
 - h. Summary sheet and work papers.
 - i. Rejection letters.

2. Establish and maintain contractor files which include the following information:
 - a. Bid/Proposal
 - b. Notice to Contract
 - c. Certificate of Insurance
 - d. Licenses, if applicable
 - e. Payment Requests
 - f. Performance Evaluations
 - g. Change Order, if applicable
 - h. Contract
 - i. Certifications
 - i. Suspension and Debarment
 - ii. Lobbying
 - iii. Drug Free Workplace

3. Protest File:
 - a. List of protest committee members.
 - b. Copy of the protest committee correspondence, meeting minutes, and work papers.