



Oregon Department of Environmental Quality

# Pre-Bid Checklist: Procurement of Equipment and Material

## For Construction Management / General Contractor Alternative Contracting Process

Contact: [Regional Project Officer](#)

The CM/GC firm is to complete, sign, and submits this pre-bid checklist to the DEQ project officer prior to advertising the any CMGC Firm procured equipment and materials. The CM/GC firm must also provide the following to the DEQ project officer:

- Draft Bid Package for Equipment and Materials
- Project Deliver Summary should provide anticipated packages for procurement of equipment and materials
- **Sections 1-4** are required
- **Section 5 Other** is included as informational only, and not explicitly required by CWSRF. They may be legal requirements or best practices.
- The loan recipient is responsible to ensure their request for bids complies with their own rules and policies and all applicable Oregon state laws.

After DEQ approval, it is expected that future procurement of equipment and materials will meet the standards laid out in the approved pre-bid checklist. "Yes" answers are necessary for bid acceptable documents unless the question is not applicable (N/A) to your project. Attach additional sheets to explain special circumstances.

Loan Recipient:		CMGC Firm:	
Project:		CWSRF Loan No.:	

### Reference list of equipment or material to be produce.

1. General Format				
Yes	No	N/A	Section & Page	
				1. Is the table of contents complete and accurate?
				2. Are pages numbered sequentially for each document subsection?
				3. Has the loan recipient's legal counsel reviewed the bid documents for their ability to be bid from and determined that the bid documents adequately protect the loan recipient's interests?

Additional Comments:

## 2. Information for Bidders

Yes	No	N/A	Section & Page	
				4. Is there a minimum 14-day advertising period?
				5. Is an equipment delivery date specified?
				6. Do the specifications detail how the successful bidder will be determined when contract documents provide for multiple schedules, additives, alternates or other options?
				7. Are understandable owner procurement protest procedures provided?

Additional Comments:

3. Bid Form				
Yes	No	N/A	Section & Page	
				8. Is the contract or purchase agreement a lumpsum or unit quantity type?  Lumpsum:  Unit quantity:
				9. Is the overlapping of bid items avoided?
				10. Are ineligible proposal costs separated from eligible cost; made a separate bid item? <b>Note:</b> Ask DEQ project officer if you have questions about ineligible proposal cost.
Additional Comments:				

4. Special Conditions				
Yes	No	N/A	Section & Page	
				11. When items are specified by brand name, are three alternative products listed, or do the specifications state "or equal"? <b>Note:</b> In general, sole source procurement is not permitted under the Oregon Administrative Rules, though exceptions are made. It is the responsibility of the loan recipient to show that an exception is warranted.
Additional Comments:				

5. Other				
Yes	No	N/A	Section & Page	
				12. Is a contact designated for pre-bid inquiries?
				13. Are there directions for modifying or withdrawing a bid prior to bid award
				14. Is the bidder responsible for all patent and royalty payments?
				15. Are there provisions for prompt review and approval of submittals and contract progress payments?
				16. Is the supplier required to submit operation and maintenance data for project equipment prior to 50% completion of contract schedule?
Additional Comments:				

Signature of Authorized Authority	Date:
Printed Name	Title

**Alternate formats**

DEQ can provide documents in an alternate format or in a language other than English upon request. Call DEQ at 800-452-4011 or email [deqinfo@deq.state.or.us](mailto:deqinfo@deq.state.or.us).