

## **Bidding** *Checklist*

In every bidding situation, consider the following issues:

- Has the board defined its goals and objectives in this bid process?
- Are there any bidding requirements in the Association's governing documents that the board should follow (i.e., a requirement to obtain at least 3 bids)?
- Will professional assistance be needed to draft the specifications for the job, and/or to evaluate the bids? Have complete plans and specifications been written to specifically define the scope of work to be performed?
- Is the bid due date clearly stated? Have the bidders been given enough time to submit complete and accurate bids?
- Should a pre-bid job walk be scheduled? Mandatory or optional?
- Have interviews with the bidders been scheduled? What questions will be asked?
- Who will check the bidder's references and what questions will be asked of the references?
- Who will check that the bidder has an active California Secretary of State registration?
- Who will check the bidder's Contractor's State License Board profile for any prior complaints/violations? If there are any complaints/violations, does the bidder have a good explanation?
- What special requirements does the association have? Are these listed in the bidder's information materials?
- Are bids to be submitted sealed or open?
- Will unsuccessful bidders be told why they were not awarded the job?
- Are the following forms included in the bid package? Invitation to Bid; Bid Form; Contractor's Qualification Form; Designation of Subcontractors; Insurance and Licensing Information Form; Contractor's Certification of Applicability of Specifications; Special Instructions; Contract Form

- Does the Contractor's Qualification Form ask for all of the following? Form of company and company principals; Years in business; Number of employees; Number of previous lawsuits/claims; References for similar jobs; Bonding capacity/surety information; Financial information; Dollar volume of business in past year(s) and value of current work in progress

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