# Checklist

## Inputs Excel Sheet

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| COMPLETED | In Progress | N/A | | Checklist Item | | Comments | |
|  |  | |  | | Propulsion Type is correctly set in the ‘Introduction’ tab. | |  | |
|  |  | |  | | Use *Ctrl+F* and search for **“Input is required”**; no results should appear | |  | |
|  |  | |  | | Use *Ctrl+F* search for “Please enter your answer”, verify that corresponding entries are filled in ***Column J - User Input for Selections Requiring Manual Specifications,*** where applicable. | | Your entries will be imported to the contract document as they are. Consider proper capitalization and punctuation. | |
|  |  | |  | | If your propulsion type doesn’t match the type specified in *Column G – Notes and Suggestions,* make sure to select **“Not Applicable” in *User Input for Selections Requiring Manual Specifications.*** | |  | |
|  |  | |  | | After you’ve filled out all required fields, use *Ctrl+F* to search for “Invalid Input.” You should find none. | | Most invalid inputs are caused by a mismatch between the propulsion type and your selections, or by skipping a required field. Ensure the propulsion type is set correctly in the ‘Introduction’ tab and that all required fields are completed. | |

## Template

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Completed | In Progress | N/A | Checklist Item | Comments |
|  |  |  | Headers are properly formatted; Date and Proposal Number are populated | The headers and footers of the non-technical (AKA commercial) section are populated automatically from the Excel input file. When copying the technical document, the headers and footers should be updated. If they don’t, please fix them manually. |
|  |  |  | Page numbers in the footer are correct and not broken after merging the two documents |  |
|  |  |  | Bullets are formatted consistently across the document |  |
|  |  |  | The agency’s logo is inserted on Page 1 |  |
|  |  |  | Review and adjust spacing between entries to eliminate extra or inconsistent spaces | All entries are in red. |
|  |  |  | Once the Mail Merge is complete, search for “Input is Required” and no results should appear |  |
|  |  |  | Search for ‘[’ in the document, manually fill all bracketed fields (formatted as [field]) not handled by Mail Merge but required for your RFP |  |
|  |  |  | Fill out **Table 1 in Section SP 2.3** to reflect the Contract deliverables required by the Contract specifications. |  |
|  |  |  | Fill out **Table 2 in Section TS 6.5** to select the appropriate Breakover Angle |  |
|  |  |  | Fill in the Top speed in **Table 3, Section TS 7.3** |  |
|  |  |  | Specify your agency’s requirement on Bus Maximum Turning Radius in **Table 5, Section TS 35** |  |
|  |  |  | If applicable, define Transit Bus Instruments and Alarms settings in **Table 6 (Alternative), Section TS 44.5**. (only if different from default) |  |
|  |  |  | List all approved products for the procurement in **Table 10, Section TS 88**. |  |
|  |  |  | Complete all forms in **Section 9**. |  |
|  |  |  | Insert the Form of Contract in **Section 10**. A sample Contract is provided in Appendix D. |  |
|  |  |  | If applicable, fill out the **Sample Performance Bond Form in Appendix E and Sample Assignment of an Option to Purchase Agreement in Appendix F**. |  |
|  |  |  | If your propulsion type is Electric, manually fill out section TS 8.2in the technical document. | This section only exists in the technical specifications for electric buses. The procurement officer must select between the default and alternatives within the document and fill out the placeholders. |
|  |  |  | Review all comments in the document. Address and delete them. | There are comments in the document’s body to attract your attention to potential issues. Go over them, modify, resolve, and delete the comment if necessary. |