

The Bid Process and Evaluation

February 11, 2019

Applicable Law

- General Goods and Services – Code of Alabama 1975, Title 16, Chapter 13B
- Public Works – Code of Alabama 1975, Title 39, Chapters 1-8
 - Also Title 34, Chapter 8 applies to contractors bidding on Public Works over \$50K

Develop Specifications

- Objectives
 - Provide best value for tax payer's dollars
 - Compliance with legal statutes
 - Purchase of appropriate products and services at best pricing
 - Provide fair competition for all vendors
 - Provide service to all internal users

Specification Types

- Types of Specifications
 - Qualified Products List – Normal Bid for Goods and Services
 - Specifications for each item and a product that meets that spec (or an approved equivalent)
 - Design Specs – Normally for Public Works
 - Professional Architect/Engineer Drawings and Specifications
 - Performance Specs (RFP)
 - What product must do or what end result will be produced

Specifications

- Item Specifications
 - Specific information that clearly states the level of quality and performance
- Statement of Work (SOW) and/or Services
 - Performance based – you tell the vendor what to do, what is needed as far as an outcome, etc.

Who's Involved in Specifications

- Who should be involved?
 - Knowledgeable Users
 - Vendors?
 - Professionals
 - Finance
 - Other Agencies
 - Purchasing
 - Legal?

Specifications

- Specification Q & A
 - Clear
 - What to do, how to perform, timing, etc.
 - Fair to allow appropriate competition
 - Provide sufficient detail to communicate what is expected
 - All aspects included? (insurance, warranty, delivery, installation, cleanup)
 - Allow for significant level of evaluation

Specifications

- Insurance
 - Workman's Comp
 - Vehicle/Equipment
 - General Liability
 - Bonds Required?
 - Amounts Sufficient for Level Needed?

Specifications

- Freight
 - Freight on Board (FOB) Destination
 - Seller arranges, pays and insures
 - FOB Destination Freight Collect
 - Buyer pays freight but seller owns
 - FOB Origin
 - Buyer accepts ownership at origin
(Not recommended unless employee picking up)

Specifications

- Installation
 - Pre-bid Conference
 - Mandatory or optional
 - Must Comply with Statues
 - Federal, State and Local
 - Utility Hookups
 - Power, water, drainage, protection

Specifications

- Warranty
 - Duration
 - Months, Years, Extended
 - Start Date
 - At installation or delivery
 - What's Covered
 - Full body or limited, installation
 - Extended Options Available
 - What is covered and at what cost?

Invitations

- Query database/files for the type vendor needed
- Search by other means (i.e., internet, trade publications, etc.)
- Third party service providers
- Can be emailed – (get confirmation of received and keep)

Bid Openings

- Have all bids addressed to person responsible for bid process
- Received, date and time stamped by another person
- Hold opening in area large enough to accommodate staff and visitors
- Keep the bid opening orderly and professional

Bid Opening

- Always have a witness such as a recording clerk/ user department staff member
- Be prepared and familiar with the bid (tools, recording sheets, addendums)
- Take full charge of the bid opening. Ask if there are any more bids and state that no more will be accepted

Bid Opening

- Review submissions for compliance with requirements of the bid (bid bonds, addendum acknowledgement, license requirements)
- If not in compliance reject the bid and do not record.
- Purchasing can prepare the Board agenda but should have a recommendation from user department

Bid Opening

- Allow public to view submittals one at a time. Purchasing should maintain control of all submittals at all times.
- Do not make an announcement at the bid opening whom the winning bid is (you may state who the apparent low bid is but let it be know that there will be further review and formal recommendation from staff)

Evaluation

- Include Submission Form that each vendor **MUST** use to submit pricing for each item
- If estimated quantity is used will an extension of price X estimated quantity be used in evaluation
- Make sure you are comparing apples with apples

Evaluation

- Things to be aware of during evaluation process:
 - Container quantity – Ounces, lbs., number per case
 - Horsepower, amperage output, grade of metal
 - Warranty provided for how long and what's covered
 - Installation included?
 - If you don't understand what if submitted ask for clarification in writing and document in file

Evaluation

- If vendor is bidding item other than the one specified – make them include specs for comparison
- Have knowledgeable staff review and make a recommendation to purchasing for the award
- Review staff recommendation to make sure it is correct, fair and justified
- Question any thing that you not comfortable with

WILSON COUNTY BOARD OF EDUCATION
1000 W. North Street
Waynesville, NC 28786

INVITATION TO BID

Business County Public Schools
1000 W. North Street
Waynesville, NC 28786

Project Title: _____ **Est. Number:** _____
Project Description: _____ **Est. Title:** _____
Estimate Number: _____ **Est. Date:** _____

Bidding Information

Where to Obtain Plans and Specifications: _____
Where to Obtain Plans and Specifications: _____
Where to Obtain Plans and Specifications: _____

Vendor Information

Company Name: _____
Company Address: _____
City: _____ **State:** _____
Zip: _____
Phone: _____
Fax: _____
E-mail: _____

Contract Information

Contract Number: _____
Contract Description: _____
Contract Value: _____
Contract Start Date: _____
Contract End Date: _____

Other Information

Notes: _____

GENERAL CONDITIONS

1. The Contractor shall be responsible for obtaining all necessary permits and licenses for the work to be performed. The Contractor shall be responsible for obtaining all necessary insurance coverage for the work to be performed. The Contractor shall be responsible for obtaining all necessary bonds for the work to be performed.

2. The Contractor shall be responsible for obtaining all necessary approvals from the appropriate authorities for the work to be performed. The Contractor shall be responsible for obtaining all necessary approvals from the appropriate authorities for the work to be performed. The Contractor shall be responsible for obtaining all necessary approvals from the appropriate authorities for the work to be performed.

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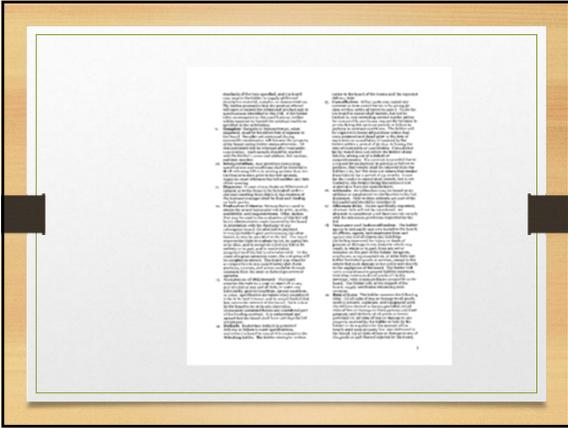
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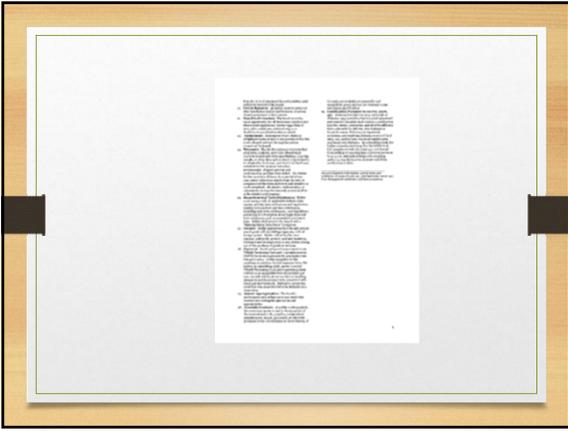
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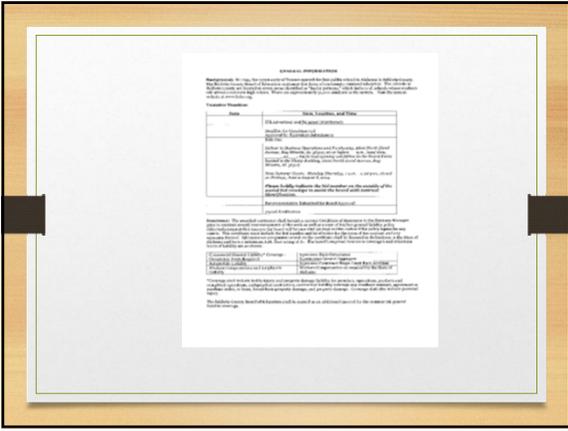
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Questions

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