



Bid Opening Procedure (PUR-P200)

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

1.0 SCOPE:

- 1.1 This procedure describes opening bids in the Purchasing Department of the Washoe County School District.

2.0 RESPONSIBILITY:

- 2.1 Chief Financial Officer

(Approval signature on file)

3.0 APPROVAL AUTHORITY:

Signature _____ Date _____

- 3.1 Chief Financial Officer

- 3.2 Purchasing Supervisor

(Approval signature on file)

Signature _____ Date _____

4.0 DEFINITIONS:

- 4.1 CFO – Chief Financial Officer
- 4.2 PRCH – Purchasing
- 4.3 Supv. – Supervisor

5.0 PROCEDURE:

- 5.1 All bids are to be opened at 2:00 p.m. Tuesday through Thursdays, unless Supervisor gives prior approval.
- 5.2 All bids must be time-stamped as received in Purchasing no later than 1:30 p.m.
- 5.3 Receiving bids:
 - 5.3.1 All bids will be time-stamped on the outside of the envelope by Program Technician or Secretary.
 - 5.3.1.1 If neither of these staff members is available, person receiving bid/envelope must stamp the bid/envelope received.
 - 5.3.1.2 If in doubt as to whether the envelope is a bid, stamp it first and then check to see if bid is identified on the outside of the envelope.
 - 5.3.1.3 If bid is not identified, ask someone else to take a look at the outside of the envelope.
 - 5.3.1.3.1 Once the envelope is determined to be unidentified, open it just enough to verify if and what bid has been submitted.
 - 5.3.1.3.2 Mark on outside of envelope near date/time stamp “opened due to lack of I.D.” with your initials.
 - 5.3.2 Seal with tape any bid that is not properly sealed at the time of delivery.
 - 5.3.2.1 If bidder is present request that they seal the bid.
 - 5.3.3 Place all stamped bids/samples in appropriate bid file.



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- 5.3.4 Write a note in the bid file to notify buyer where boxed samples/items that can not fit in the bid file are located.
- 5.3.5 Late bids that arrive by mail are to remain unopened.
 - 5.3.5.1 Time stamp the bid.
 - 5.3.5.2 Photocopy the complete front of the envelope and verify quality of copy.
 - 5.3.5.3 Return bid to supplier with Bid Return Letter (PUR-F216).
 - 5.3.5.4 Staple photocopy of late bid to copy of signed Bid Return Letter and file in the appropriate bid file.
- 5.3.6 Suppliers arriving in person with late bids are to be advised that their bids cannot be accepted.
 - 5.3.6.1 Do not take the bid.
 - 5.3.6.2 If possible, receptionist/staff will make a note as to who/what time the late supplier arrived with the bid.
 - 5.3.6.3 If a supplier becomes angry, ask the supplier to have a seat in the reception area and locate the supervisor.
- 5.4 Preparation for Opening
 - 5.4.1 Clerical/Program Tech
 - 5.4.1.1 Clerical staff to prepare for opening during ½ hour before public opening.
 - 5.4.1.1.1 Prepare label for audiotape.
 - 5.4.1.1.2 Test audio recorder/tape to make sure it is working properly.
 - 5.4.1.1.3 Provide buyer with envelope opener, time stamp with correct date and time, and scissors.
 - 5.4.1.1.4 Alphabetize all bids with unidentified bids last.
 - 5.4.1.1.5 Prepare Bid Opening Table (PUR-F215), which clerical staff fills out as Buyer opens bids.
- 5.5 Opening Statement
 - 5.5.1 Prior to the audio recording Buyer explains to any attending suppliers that if they have questions, they must be addressed at the end of the bid opening.
 - 5.5.2 Buyer tells the suppliers that he/she will be asking them to introduce themselves and the company they represent for the audio recording.
 - 5.5.3 Buyer states that he/she does not read pricing (unless there are only one or two items, or Buyer has the time to do so).
- 5.6 Buyer Bid Opening Procedure
 - 5.6.1 Turn on the recorder and state: "This is the audio recording of the bid for _____, bid number _____, date, time and buyer name and secretary from the Purchasing Department".



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- 5.6.2 Ask for introductions by attendees.
 - 5.6.3 Record the name, written on the bid envelope, stamp the outer envelope and inner envelope, if applicable, and open the bid.
 - 5.6.4 If the bid was prematurely opened, state "the bid was prematurely opened because it was not identified".
 - 5.6.5 Stamp the bid on the first page.
 - 5.6.6 Note the supplier appears (or does not appear) to have returned the complete bid package.
 - 5.6.7 Count or stamp each page that has pricing or note any missing pages.
 - 5.6.7.1 The buyer can pass on this process if the bid is really lengthy.
 - 5.6.8 Note that there are (or are not) exceptions to the bid.
 - 5.6.9 If required, note that the bid appears to have (or not have) a bid bond.
 - 5.6.9.1 After the bids are opened and the suppliers have left the room, the buyer and secretary need to confirm whether a valid bond is present if it was required.
 - 5.6.10 Note if there appears to be an addendum to the bid.
 - 5.6.11 Does the bid appear to have specifications?
 - 5.6.11.1 Stamp, if possible, and note if they have provided a catalog.
 - 5.6.12 Does the bid appear to have material safety data sheet(s)?
 - 5.6.13 Does the bid appear to have samples?
 - 5.6.14 Record delivery lead-time.
 - 5.6.15 Secretary to verify delivery lead-time, terms and bid signature before buyer begins evaluation.
 - 5.6.16 Time-stamp the last page of the bid near the signature.
 - 5.6.17 Return bid and all submitted items to the envelope or have the secretary return them to envelope for you.
 - 5.6.18 Time-stamp and note all "no bids".
 - 5.6.19 Bid on which supplier is not identified on the outside of the envelope.
 - 5.6.19.1 Time-stamp the envelope and then time-stamp the first page of the bid document.
 - 5.6.19.2 Go to the last page of the bid and identify the bidder.
 - 5.6.19.3 Repeat 5.6.3 – 5.6.18 above.
 - 5.6.20 Repeat 5.6.3 – 5.6.18 above for each bid opened.
- 5.7 After bid opening and while the tape is recording, Buyer will:
- 5.7.1 Ask for questions from the attending public.
 - 5.7.2 Address any misunderstandings a supplier may have about bid evaluation (bid should contain this information).



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5.7.2.1 Regarding questions on the timeline for evaluation, Buyer may simply state that he/she has not seen the bids and has not evaluated them yet.

5.7.3 State: "This concludes the bid opening", turn the recorder off and rewind tape.

5.7.4 Buyer may allow attendees to view the bids (insuring nothing is changed, removed or added to a bid and that they are returned to the proper envelopes), or may ask them make arrangements to view the bids at a more convenient time.

5.8 Supervisor's approval is always requested prior to disposition of any documentation.

6.0 ASSOCIATED DOCUMENTS:

6.1 Bid Opening Table (PUR-F215)

6.2 Bid Return Letter (PUR-F216)

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Bid	Purchasing Office File	7 years	Discard as desired	Standard file cabinet in secured office
Bid Return Letter	Purchasing Office File	7 years	Discard as desired	Standard file cabinet in secured office
Bid Opening Table	Purchasing Office File	7 years	Discard as desired	Standard file cabinet in secured office

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
9/29/06	A	Initial Release
5/1/07	B	Added 5.8; updated Record Retention Table.
9/22/08	C	Corrected simple formatting issues throughout the document with spacing and numbering; added "and" to 5.3.1.2; and ending parenthesis to 5.5.4; changed reading language in 5.6.8, 5.6.9, and 5.6.10 to not read as questions; added "if it was required" to end of 5.6.9.1.
2/10/09	D	5.5.2 removed, 5.5.5 removed
05/07/09	E	5.3.5.3 deleted "on Shared File"; 5.6.17 replaced "on top of" with "near the."

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