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## Recommendation for Award Procedure (PUR-P308)

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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 the Recommendation for Award in the Purchasing Department of the Washoe County School District.

### 2.0 RESPONSIBILITY:

- 2.1 Chief Financial Officer

### 3.0 APPROVAL AUTHORITY:

- 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 NV - Nevada

### 5.0 PROCEDURE:

- 5.1 Once a bid has been opened, Clerical Staff prepares preliminary bid tabulation (PUR-F238 or PUR-F249) grid with list of vendors submitting bids and gives it to Buyer.
- 5.2 Buyer fills in bid figures and returns tab to Clerical Staff, who completes the Bid Tabulation (PUR-F238 or PUR-F249), Bid Key (PUR-F309) and Recommendation for Award.
- 5.3 Clerical Staff forwards completed documents to Buyer.
- 5.4 Once the Buyer has approved the Recommendation for Award, Bid Key and Bid Tabulation, Clerical Staff:
  - 5.4.1 Emails Recommendation for Award and Bid Tabulation to Purchasing Supervisor, who approves and forwards them to the CFO.
    - 5.4.1.1 CFO emails an approval back to Purchasing Supervisor, who forwards email to Clerical Staff.
  - 5.4.2 Develops a Recommendation for Award package including CFO email approval, Recommendation for Award, Bid Tabulation and Key.
    - 5.4.2.1 Buyer signs package in signature area of Bid Tabulation.
  - 5.4.3 Files signed Recommendation for Award package in bid folder under "Recommendation for Award".
  - 5.4.4 Posts Recommendation for Award document and Bid Tabulation on Purchasing Department websites, (PUR-G201).



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- 5.4.4.1 Requests email confirmation when documents have been posted.
- 5.4.4.2 Date of posting becomes day one (1) of six (6) calendar days allowed for bid appeal.
- 5.4.5 Files downloaded/approved documents in expanding bid folder.
- 5.4.6 Prints broadcast list when applicable, from websites and files it in blue bid notebook at "Vendor Mailing List".
- 5.4.7 Gives vendor address updates to Program Technician.
- 5.5 An unsuccessful bidder has six (6) calendar days from the date of posting the Recommendation for Award/Tabulation on the websites to file a written appeal with the PRCH Supervisor.
  - 5.5.1 If an appeal has been made, Clerical Staff posts bid as Awarded on Purchasing Department websites, (PUR-G201) only after appeal has been resolved either by the PRCH Supervisor, Appeal Committee or the Board of Trustees.
- 5.6 If there has been no appeal to the Recommendation for Award/Tabulation by 5:00 P.M. on the sixth (6<sup>th</sup>) calendar day after posting on the websites, on the seventh (7<sup>th</sup>) day Clerical Staff posts bid as Awarded on websites, and orders may be placed.
- 5.7 Clerical Staff then:
  - 5.7.1 Files approved screen-prints of Award from websites in bid notebook at "Recommendation for Award/Award".
  - 5.7.2 Copies Recommendation for Award, Bid Tabulation and Key onto an external drive.
  - 5.7.3 Lists bid on Purchasing Shared Bid Calendar.
  - 5.7.4 Writes final contract price in Bid Number notebook.
- 5.8 Supervisor's approval is always requested prior to disposition of any documentation.

### 6.0 ASSOCIATED DOCUMENTS

- 6.1 Bid Key (PUR-F309)
- 6.2 Bid Tabulation (PUR-F238 or PUR-F249)
- 6.3 Recommendation for Award (See Shared File)
- 6.4 Purchasing Department websites (PUR-G201)

### 7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
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**Recommendation for Award  
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Bid Key	Bid File	7 Years	Discard as desired	Standard file cabinet in secured office
Bid Tabulation	Bid File	7 Years	Discard as desired	Standard file cabinet in secured office
Recommendation for Award	Bid File	7 Years	Discard as desired	Standard file cabinet in secured office
CFO Approval Email	Bid 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>
10/12/06	A	Initial Release
5/1/07	B	Added 5.8; updated Record Retention Table
2/9/09	C	5.1 added form numbers, 5.2 changed types to completes, added form numbers, 5.3 deleted for initialing, 5.4 deleted and initialed, 5.4.1 changed Chief Financial Officer to CFO, 5.4.1 added Purchasing Department websites, 5.4.4.1 deleted, 5.4.4.1.2 changed seven to six, 5.4.4.2 deleted, 5.4.5 deleted, 5.4.7 added when applicable, from websites, 5.5 changed seven to six, deleted NV State Purchasing website to websites, 5.5.1 added Purchasing Department websites and deleted NV State Purchasing and DemandStar, 5.6, changed seventh to sixth and eighth to seventh, deleted NV State Purchasing website and added websites, 5.7.2 deleted FY Bid CD and added an external drive, 5.7.3 added the word Bid after Shared, 6.0 added 6.4

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