



## **Preparation of a Request for Bid/Proposal Work Instruction (PUR-W430)**

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

### **1.0 SCOPE:**

- 1.1 This work instruction describes the preparation of a Request for Bid/Proposal folder and supporting documentation 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 PELB – Electronic report processed through Business Plus titled “Printing Address Labels”
- 4.2 RFB – Request for Bid
- 4.3 RFP – Request for Proposal

### **5.0 WORK INSTRUCTION:**

- 5.1 Once RFB/RFP document is assigned a number from the general log book (located in the Purchasing Department), the Purchasing support staff begins the process of preparing the RFB/RFP folder and supporting documentation. Refer to Request for Bid/Proposal Procedure (PUR-P301).

#### File Folder Preparation:

- 5.2 Purchasing support staff prepares an appropriate file folder with three (3) file labels (at minimum) to reference the RFB/RFP name, number, opening date and time. Multiple files may be used to identify the RFB/RFP with each file folder numbered accordingly.
  - 5.2.1 One label is adhered to each side flap of the file folder.
  - 5.2.2 One label is adhered to the tab of a manila file folder which is placed in the designated drawer labeled “Current Unopened Bids”.
- 5.3 Stickers that identify the month, day and fiscal year of the RFB/RFP opening are placed in appropriate locations on the file folder.

#### RFB/RFP Notebook Preparation:

- 5.4 Each RFB/RFP should have an appropriate notebook prepared with a Table of Contents (with numbered tab sheets) that identifies the name, number, opening date and time for the RFB/RFP typed on the upper left-hand side.

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5.4.1 Headings for numerical tabs are as follows (additional sections can be added if necessary):

- (1) Specifications, Addendums
- (2) Postings
- (3) Mailings
- (4) Recommendation of Award, Tabulation, Bid Tabulation Key Sheet
- (5) Insurance
- (6) Renewals
- (7) Appeals (highlighted when an appeal occurs)
- (8) Correspondence

Recording Preparation:

5.5 Recordings that are used to verify RFB/RFP opening details are kept in RFB/RFP file or maintained electronically in the Purchasing Department with all pertinent documentation.

- 5.5.1 Any recording must be labeled with RFB/RFP name, number, opening date and time.

Mailing List Preparation:

5.6 Purchasing support staff will prepare the RFB/RFP mailing list and mailing labels for Bid Postcard (PUR-F220) by running the Business Plus report titled: "Printing Address Labels" (PELB). The PELB report is prepared as follows:

- 5.6.1 Log into Business Plus and click on the 'All' tab (top of screen).
- 5.6.2 Enter PELB in the *Command* space. Press Enter.
- 5.6.3 At Name of the Address Label Definition, replace LABEL001 with LAZER01.
- 5.6.4 The heading 'In which order would you like the labels sorted?' should automatically be populated with NM.
- 5.6.5 Click '+' to open PE Selection Criteria.
- 5.6.6 Locate 25 – Association Code Values and type PRxxxxx where 'xxxxx' represents a commodity code provided on the Request for RFB/RFP Folder (PUR-F218). Multiple commodity codes preceded by PR and separated by a comma may be typed in the 25 – Association Code Values field.
- 5.6.7 At Address Hierarchy, replace BUHO with B2B1.

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- 5.6.8 Locate "Line Printer Copies, Name, Pri." From the center dropdown field, choose designated user's printer. Click on Submit.
- 5.7 Purchasing support staff will manually cross out duplications or labels that are noted as "Do Not Use."
- 5.8 Purchasing support staff enters the commodity codes used for the PELB report at the top of the first page of the PELB report.
- 5.9 If previous bids for this commodity are available, copies of previous Bid Tabulation Key Sheet(s) (PUR-F309) shall be provided to Buyer along with the PELB report.
- 5.10 The PELB report, copied key sheets, and RFB/RFP file materials are returned to the assigned Buyer who is responsible for any deletions to the report, final review and edits. Buyer is responsible for ensuring the mailing list is valid and up-to-date.
- 5.10.1 Buyer is to delete (by marking with an "X") suppliers from the current PELB report listed in the "No Response" area of previous Bid Tabulation Key Sheet(s).
- 5.10.2 Buyer is to delete (by marking with an "X") suppliers he/she is confident are not able to supply product or service requested in the RFB/RFP. If in doubt, Buyer or designee will call supplier to confirm whether a supplier can supply product or service requested in the RFB/RFP.
- 5.10.3 Buyer highlights (for commodity code deletion from Business Plus) any supplier that does not respond to three (3) consecutive bids as shown on the previous Bid Tabulation Key Sheet(s). Refer to Commodity Code Database Deletion Work Instruction (PUR-W428).
- 5.11 Buyer reviews RFB/RFP document and requests labels for suppliers who submitted a response on the last RFB/RFP and adds them to the list, if not already noted.
- 5.12 Buyer will return the PELB report and RFB/RFP file to the Purchasing support staff who places a copy of the PELB report in the RFB/RFP notebook under the designated section.

Bid Postcard (PUR-F220) Preparation:

- 5.13 Purchasing support staff affixes address labels from PELB report and RFB/RFP name/number labels on the appropriate side of bid postcards.
- 5.13.1 Stacks of postcards must be properly bound before mailing.
- 5.14 After Purchasing Supervisor approves the final draft RFB/RFP, bid postcards are mailed the same day as RFB/RFP newspaper publication day.

Legal Ad Preparation:

- 5.15 Purchasing support staff prepares and processes the legal ad using Newspaper Ad Form (Notice to Bidders) (PUR-F237) including payment as determined by the Buyer.

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- 5.15.1 After legal ad is reviewed for accuracy by support staff and after Purchasing Supervisor approves the final draft of RFB/RFP, PUR-F237 is submitted to appropriate publishers and is placed in RFB/RFP notebook in the designated section.
- 5.15.2 If legal ad is charged to the Purchasing Department, PCard receipt is given to Administrative Secretary.
- 5.15.3 On publication day, legal ad is clipped from the newspaper and attached to the Newspaper Ad Form in bid notebook.
- 5.15.4 On newspaper publication day, copies of legal ad are posted on the Purchasing Department bulletin board and in the Purchasing Department reception office.

Posting/Distributing/Archiving RFB/RFP:

- 5.16 On newspaper publication day, Purchasing support staff scans appropriate RFB/RFP documents and posts on appropriate websites using Purchasing Department Websites Guidelines (PUR-G201).
  - 5.16.1 Scanned RFB/RFP documents are saved to an external drive that is supported by the Purchasing Department.
  - 5.16.2 For distribution of the RFB/RFP, Purchasing support staff will use either a Bid Postcard (PUR-F220) or an email with RFB/RFP document(s) attached sent to the registered supplier or a combination of both.
  - 5.16.3 Support staff verifies accuracy of website postings and checks off each posting on Bid Folder Checklist (PUR-L246) which is filed at front of bid notebook.
  - 5.16.4 Copies of postings are filed in RFB/RFP notebook in the designated section.
  - 5.16.5 Support staff verifies that RFB/RFP opening date and time are noted on shared electronic calendar and reserves a conference room if necessary.
- 5.17 All forms and supporting documentation associated with this work instruction are filed in the RFB/RFP folder.
- 5.18 Supervisor's approval is always requested prior to disposition of any documentation.

**6.0 ASSOCIATED DOCUMENTS:**

- 6.1 Request for Bid/Proposal Procedure (PUR-P301)
- 6.2 Request for RFB/RFP Folder (PUR-F218)
- 6.3 Bid Postcard (PUR-F220)
- 6.4 Newspaper Ad Form (Notice to Bidders) (PUR-F237)
- 6.5 Bid Tabulation Key Sheet (PUR-F309)
- 6.6 Bid Folder Checklist (PUR-L246)

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6.7 Commodity Code Database Deletion Work Instruction (PUR-W428)

6.8 Purchasing Department Websites Guidelines (PUR-G201)

6.9 PELB report "Printing Address Labels" from Business Plus

**7.0 RECORD RETENTION TABLE:**

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Bid Postcard	Bid File	7 years	Discard as desired Per CSI-F004	Standard file cabinet in secured office
Newspaper Ad Form (Notice to Bidders)	Bid File	7 years	Discard as desired Per CSI-F004	Standard file cabinet in secured office
Bid Tabulation Key Sheet	Bid File	7 years	Discard as desired Per CSI-F004	Standard file cabinet in secured office
Bid Folder Checklist	Bid File	7 years	Discard as desired Per CSI-F004	Standard file cabinet in secured office
RFB/RFP Folder	Bid File	7 years	Discard as desired Per CSI-F004	Standard file cabinet in secured office

**8.0 REVISION HISTORY:**

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
02/07/11	A	Initial Release

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