## **BID PROCESS**

Dept/Site Identifies
Needs (exceeds
applicable bid
threshold)

- Monitors expenditures
- Forecasts projects
- Identifies when bid needs to be in place/term of bid
- Develops required specifications\*

Notifies
Purchasing that
a Bid is needed

Jointly develop a timeline

Actual Bid Process

- •Purchasing submits Notice Calling for Bid to newspaper (Deadlines for OC Register will be posted on Purchasing website)
- •Notice Calling for Bids must run twice, with at least 5 days between each publication date, not counting the publication dates
- •Deadline for Request for Information (RFIs) is typically a few days after second advertisement
- •Purchasing issues an addendum responding to all received RFIs at least 72 hours before bid deadline
- Purchasing schedules and conducts bid opening (books conference room, sign in sheets, etc.)
- •Purchasing screens and identifies apparent low bidder and forwards bid to req. dept for confirmation/verification that any proposed substitutions are equivalent, specs conform, etc
- •Once low bid is confirmed by requistioning dept, Purchasing will draft Board agenda item to award bid
- •Upon Board approval, Purchasing executes contract and collects all required documents
- Purchasing provides req. dept with awarded bid and contract

- 1. Specs for the project/service/goods
- 2. Term of bid (Purchasing will identify eligible extensions)
- 3. Estimated expenditures using the bid

- 4. Funding source (general fund, deferred maintenance, CFD funds, gift funds, etc.)
- 5. Bonding/insurance applicable requirements

Req. dept. will submit PR (Purchasing will issue POs)

Req. dept. must track expenditures under PO and ensure conformity with bid specs, including submitting additional PRs if needed Req. dept. will notify Purchasing, including all needed information for Board agenda item (#2, 3, 4 and 5 listed above), if wanting to extend bid beyond initial term (Purchasing will work with existing vendor to confirm and submit to Board for approval of extension)

<sup>\*</sup>Requistioning department to provide the following information (to be incorporated into Bid document and Board agenda item):