

Alamo Community College District

Formal Bid Checklist

The following outline has been prepared at the request of end-user departments. Because most departments only occasionally require the formal bid procurement process, it may be helpful to identify critical steps with a 'checklist'. Those items which have a box () preceding the number, indicate departmental responsibility and must be performed by the requestor. The remaining items will be accomplished by others.

The formal bid process must be followed if the purchase costs \$25,000 or more, or it falls in an "over \$25,000" aggregate commodity code. Exceptions to this process are: purchases made from a publicly advertised contract, or a designated Catalog Information System Vendor (CISV). For more information, please reference the ACCD procedures CF Local.

Questions regarding the formal bid process should be directed to Dwight Gillespie, Associate Director of Acquisitions, 485-0104.

I. Getting Started!

- A. Memorandum to District Director of Acquisitions and Administrative Services
 - 1. Request for advertisement
 - a.) Cost is more than \$25,000.
 - b.) Cost is less than \$25,000, but in an 'Over' \$25,000 category.
 - 2. Scope of purchase/project, i.e. description of what is requested – purpose/use
 - 3. Dollar amount budgeted
 - 4. Complete FOAPL where funds are located, including account code
 - 5. Technical specifications (see I.B. below)
 - 6. Names and contact information of 3 companies, minimum, who can supply this service/product
 - 7. Department designee who is knowledgeable of this project to work with Acquisitions
 - 8. Certificate of Non-Restrictiveness (see I.C. below)
 - 9. Signed and dated by budget manager

10. Signed by college president or district director

B. Specifications (detailed statement or enumeration of particulars) attached to memorandum

1. Description of product (brand name and equivalents) or service.

2. Quality – standards (federal, state, local)

3. Quantity

4. Delivery/Installation location

5. Training requirements

6. Manuals or accompanying literature (number of sets)

7. Warranty

8. Trade-in (model, manufacturer, year, condition, ACCD tag #, etc.)

9. Condition (new, used, refurbished)

10. Special requirements

11. Time constraints

C. Certificate of Non-Restrictiveness attached to memorandum

1. Sample

“I certify that the specifications are required to meet the needs of my program/class and are not written to exclude any vendor or restrict competition. Furthermore, I certify that I did not receive assistance from any vendor in the preparation of these specifications.”

Originator

Date

College President/District Director

Date

II. Competitive Process

A. Preparing the documents

Budget manager signs and approves final draft of specifications.

B. Formal advertisement

- C. Contacting vendors
- D. Receiving responses
- E. Department representative present at pre-bid conference, if scheduled.
- F. Department representative attends bid opening.

III. Evaluation Process

- A. Department receives copies of responses at bid opening or deadline.
- B. Independent evaluations conducted at department and at Acquisitions
- C. Upon completion of analysis, both groups discuss findings and consensus is reached.
- D. Recommendation is written by department.
 - 1. Signed by budget manager
 - 2. If over \$25,000, signed by College President/District Director

IV. Award

- A. If award is under \$25,000
 - 1. Upon receipt of department's recommendation, Acquisitions prepares final recommendation.
 - 2. Upon award, department enters requisition.
- B. If award is over \$25,000
 - 1. Department submits recommendation, signed by budget manager and college president/district director.
 - 2. Attends Board meeting when project is on the agenda
 - 3. Acquisitions prepares purchase order.
 - 4. Upon receipt and acceptance of products/services, Budget Manager notifies Accounts Payable in writing for payment.