Organizational Tips & Tricks of Bid Writing

KELLEY WASSERMANN
SYLACAUGA CITY SCHOOLS
When you make a mistake, there are only three things you should ever do about it: 1. Admit it. 2. Learn from it, and 3. Don't repeat it.

— Bear Bryant —
You have to write a bid. Where to begin?
Research!

- ASNA expo
- Network with other directors
- Field trip (road trip)
- Online resources (Hubert, Webstaurant, Manufacturers)
- Discuss with maintenance staff
“Details matter. It’s worth waiting to get things right.”

- Steve Jobs
Let’s get started!
To begin:

Isolate yourself from all distractions

- Close your door
- Close your e-mail
- Set phone to Do Not Disturb
Bid Timeline

Back track from date of board meeting.
Bid Timeline

- Check Board Calendar for meeting date

- Have the bid opening no later than one week before the meeting (to verify documents, specifications, etc.)

- Issue the bid at least 14 days before the opening date (as a courtesy, I like to give 10 business days)
Bid Timeline

- When bid is issued, schedule one to three people to attend the bid opening as witnesses.

- Start working on the bid at least one week before you want to send it and be sure to go over specifications carefully.

- Compare bid document with the checklist and make sure all forms are included.
Bid Timeline: Example

Board meets Tuesday, October 26

Bid opening would be scheduled for no later than Tuesday, October 19 (one week prior)
Bid document would be released to vendors no later than Tuesday, October 5 (Two weeks on the street)

Begin writing the bid Monday, September 27 (One week before release)

Plan on five weeks from start to award
Delivery Time:

4-6 Weeks (before COVID)
2-4 Months (current)
Therefore....

“Never put off until tomorrow what you can do today.”

- Benjamin Franklin
What needs to go in a bid?
Bid Document

- Number the bid (fiscal year-xx)
- Date the invitation to bid is issued
- State the items for which you are seeking price quotes
Bid Document

- Date of bid opening
- Time of bid opening
- Where bids should be mailed (name and address)
Terms for contract termination

Any standard district phraseology

Affidavit of immigration compliance
Bid Document

- Terms of payment
- List of documents the bidder should include when returning the signed bid packet
- List of general instructions to bidders
Delivered bids should have the bid name, number, and opening date on the outside envelope.
Any bids inadvertently opened are rejected

No oral, telegraphic, or telephone proposals will be accepted

Unit cost prices are not to exceed two decimal places
Bid will be awarded to lowest responsible bidder meeting all requirements

Delivery requirements

Prices must be firm for the contract period

Successful bidder will be responsible for damage to buildings and grounds
Code of conduct

Buy American

Contact information for inquiries concerning the bid

Non-discrimination statement
Item Specifications

- Name of equipment or item
- Number needed
- Preapproved model and manufacturer
- Standard features
- Warranty
- Utility requirements
- Additional requirements
Itemized list bid proposal form

Lists the name of the item for price quotes and school location

Preferred model number / acceptable alternates

Total bid price
Bid Document

- Name of vendor/dealer
- Name of contact person
- Telephone number of contact person
- Signature of contact person
- Notarized
ITEMIZED LIST BID PROPOSAL FORM

Combi Oven – Indian Valley Elementary School
The undersigned offers this bid price, terms, and delivery as per specification.

PREFERRED: Vulcan Model ABC7G-NATP

TOTAL BID PRICE: 

Vendor / Dealer: 

Contact Person (please print): 

Telephone: 

Signature: 

Date: 

THIS BID MUST BE NOTARIZED 

____________________ Day of ____________ 2019

____________________ Notary Public

ALABAMA STATE LICENSE NO. 

____________________
Compile list of at least two to three, preferably more, vendors to receive bid

If emailing, add a “read receipt” and print for documentation
SYLACAUGA CITY SCHOOL DISTRICT
College Career Community

CHILD NUTRITION PROGRAM
- Blended and Virtual Student Meal Order Form
- Home
- CNP Documents
- Lunch Menus
- Nutrition Presentations
- Wellness Plans
- Summer Feeding

ALABAMA SMART SNACK POLICY
- Alabama Smart Snacks Policy

BIDS
- Walk-In Freezer Renovation 2021
- Chemical Bid 2021-2022
- Produce Bid 2021-2022
- Milk Bid 2021-2022

BROCHURES
- School Breakfast Program page 2
- Letter to Parents
- USDA Smart Snacks
- School Breakfast Program
Sylacauga City Schools
Bid File Checklist

- Approval from Angeline Lowe (if applicable)
- Invitation to Bid - Document
- General Requirements of Sylacauga City Schools
- A copy of the bid specifications
- Itemized List Bid Proposal Form
- Buy American Attestation (Produce, Bread, Milk, Ice Cream)
- Buy American Attestation Noncompliant Product List (if applicable)
- Vendor Certification
- Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion - Lower Tier
- Affidavit of Alabama Immigration Compliance signature page
- Notice of Alabama Immigration Law Compliance Requirements to all Contractors
- E-Verify/Memorandum of Understanding
- Required Federal Provisions for Procurement in CNP Programs
- The original bids of each vendor that submitted a bid
- A bid tabulation sheet which identifies the low bidder
- Documentation to support the conclusion that a bidder did not meet specifications. Reasons should be recorded in
- Documentation to support that a bidder was not responsive
- A copy of the advertisement that was posted on the bulletin board, website, or advertised in the newspaper
- Any decision made by the BOE pertaining to the omission of a certain vendor should be documented in the bid file
- A copy of the recommendation that was sent to the BOE requesting award of bid
- Copy of Board Minutes awarding the bid

Note:
Bid File Checklist

- Approval from Angelice Lowe (if applicable)
- Invitation to Bid – Document
- General Requirements
- Copy of Bid specifications
- Itemized List bid proposal form (if applicable)
Bid File Checklist

- Buy American attestation (produce, bread, milk, ice cream)
- Buy American noncompliant product list (if applicable)
- Vendor certification
- Certification regarding debarment, suspension, etc.
- Affidavit of Alabama immigration compliance signature page
Bid File Checklist

- Notice of ala immigration law compliance to all contractors
- E-verify memorandum of understanding
- Required federal provisions for procurement in cnp
- Original bids of each vendor that submitted a bid
- Tabulation sheet identifying low bidder
Bid File Checklist

- Documentation supporting a bidder not meeting specifications
- Documentation supporting a bidder was not responsive
- Copy of advertisement posted on bulletin board or sent to media
- Any decision made by BOE to omission of a vendor
- Copy of recommendation for BOE approval
- Copy of BOE minutes disclosing how each board member voted
At the time bid is written, go ahead and prepare the following:

- Bid opening sign-in sheet
- Bid opening posting
- Bid tally sheet
- Bid requirements checklist
SYLACAUGA CITY SCHOOLS

BID OPENING

Combi Oven - Indian Valley

Wednesday, April 10, 2019 at 10:00 AM
SYLACAUGA CITY SCHOOLS
Combi Oven - Indian Valley
Wednesday, April 10, 2019 at 10:30 AM

Attendance at Bid Opening

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SYLACAUGA CITY SCHOOLS
Combi Oven - Indian Valley
Wednesday, April 10, 2019 at 10:00 AM

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Procurement Plan
Procurement Plan

- Keep updated for compliance
- Sept. 12, 2018 Memo from Dr. Mackey
- Aug. 9, 2021 Pre-Approved Capital List
- Aug. 20, 2021 Emergency Purchases
Procurement Plan

- Federal Micro-Purchase threshold increased from $3,500 to $10,000
- Small Purchases – below $15,000
- Formal Procurement - $15,000 or greater
Procurement Plan

For purchases over $5,000

- For items not on 8/9/2021 memo list, must submit equipment request form to Angelice Lowe for approval

- Do not proceed until you have this approval
SVLACAUGA CITY SCHOOLS
PROCUREMENT PLAN
FOR
CHILD NUTRITION PROGRAMS

This procurement plan for the Child Nutrition Program of Sylacauga City Schools is effective July 1, 2017 and is based on state and federal guidelines. All procurements must adhere to fair and open competition. Source documentation must be available to determine open competition, the reasonableness, the allowability, and the allocation of costs.

Superintendent
Sylacauga City Schools

Date

Chief School Financial Officer
Sylacauga City Schools

Date

Director, CNP / Wellness / Communications
Sylacauga City Schools

Date

DATE OF REVIEW:
AMENDMENTS:

DATE OF REVIEW:
AMENDMENTS:

DATE OF REVIEW:
AMENDMENTS:
Procurement Plan

- Approvals
- General requirements
- Code of conduct and conflicts of interest
- Buy American
- Federal laws
Procurement Plan

- Micro purchasing
- Small procurement
- Formal procurement
- Equipment
- Professional services
- Emergency purchasing
Purchasing Groups

- PACA
- US Communities
- Local Cooperatives
Almost there!
Equipment Asset Inventory

- File folder for each piece of equipment filed by school (Bid folder)
- Labeled with name of equipment, serial number, asset id
- Folder contains copy of purchase order
- Copy of invoice
- Copies of all work orders for that equipment
- Photograph of each piece in master binder
Tips and Tricks

- Desktop Folder called “BIDS”

- Contains subfolders of every bid I have written since 2004

- Milk > Milk Bid 2007, Milk Bid 2009, Milk Bid 2012, Milk Bid 2014, etc
Tips and Tricks

- Folder for every piece of equipment, coded by school name
- IV 3-compartment sink 2020
- IV combi 2019
- IV freezer 2019
- IV slicer 2012
- IV tilt skillet 2008
If you need to write a bid for a similar piece of equipment for another school, this makes it easy to see what you did before (and may want to do differently.)
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To file a program complaint of discrimination, complete the USDA Program Discrimination Complaint Form, (AD-3027) found online at: https://www.usda.gov/sites/default/files/documents/USDA-OASCPR20P-Complaint-Form-0508-0002-0508-11-28-17Fax2Mail.pdf, and at any USDA office, or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by:

(1) mail: U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410;

(2) fax: (202) 690-7442; or

(3) email: program.intake@usda.gov.

This institution is an equal opportunity provider.
Celebrate! You are done!
Kelley Wassermann, SNS
Director CNP/Wellness Communications
Sylacauga City Schools

Kelley.Wassermann@scsboe.org
The End