

# BEST PRACTICES - IN-PERSON BID OPENING

**1** Only 1 representative from the District speaks. Typically Purchasing Director or Buyer. If the Buyer is not familiar with the process, get educated and ready. Not best practice to have Architect, PM, or CM speak for the District at this meeting - District decision.

**2** Don't allow the PM or Architect to hold private conversations with their friends before, during or after. This activity can look like favoritism. Saying Hi, shaking hands, okay - just not extended private talk or whispering.

**3** Those who attend the bid opening from the project team need to keep their reactions to themselves. This type of behavior can complicate

bid protests. They listen neutrally and can meet AFTER in private to go over the results and any required actions.

**4** Get a room for the opening.

**5** Identify 1 specific place where bids will be received and stamped in. Should be easy to find, whether in person or online, and if in person should be identified from the outside, near the parking lot, and not be moved from bid to bid.

**6** Identify 1 person assigned to run the bid clock, announce the time, accept the bids, and close

the bid period. Have that person walk all bidders to the bid room, along with the bid packages.

**7** Envelopes are to be sealed. If not sealed and there is time, hand it back and have bidder seal the envelope. If time is up, then it will be a business decision by the District's management to accept or waive the irregularity.

**8** Identify a copy machine nearby for needed copies post-bid. Test that you can use it and that it is working the day of the bid.

## Things to say & Do during bid opening

- Introduce yourself and state what project is being opened, the District people present, the Architect, Project Manager.
- State that bids will be opened, the bidder identified, amounts read aloud in words and digits.
- Announce the basis of award (base bid, base plus alternative 1, or whatever you decided when creating the bid documents).
- **\*\*Open the bids, announce each\*\*** No need to read the subs - you'll give them a copy of that at the end and you can tell them that.
- Write bid results in the bid form you created from the planholder list (better yet, get another team member to write in the numbers as you go along).
- Announce the apparent low bidder to all attendees. State that the documents will move into verification and that no action is official until the contract is awarded.
- Announce that the bid form itself, along with the apparent low bidder's listed subcontractors will be copied and provided immediately for anyone who wants it. Take a count. Ask if anyone wants the apparent 2nd low's form and sub list. Provide if requested.
- End the session and thank them for their interest. Tell them that the bid results will be emailed to them today.
- Tell those that want copies to remain in place while they are made and brought back to them.
- Help your team members understand that this is not the time for discussing ANYTHING about the bid results. They can say goodbye and direct anyone that asks to put their questions in writing to the email address provided for the Purchasing Director or Buyer.
- If using a blind bid process, then bidders all go home, and the blind bid process is completed - usually same day. Make sure all decision-makers are available after the bid for 1 or 2 hours and have a room reserved for this process. Give yourself about 1/2 hour between bid and blind bid process for working up the bid results and blanking out the bidders and giving each a neutral identifier. REMEMBER, decision makers CANNOT be present at the bid opening if using this process.

### Bring things you'll need:

- Bid results form
- Letter opener
- Staple remover
- Large paper clips
- Pens
- Contact person business cards
- \_\_\_\_\_?