

# How To Do An Invitation for Bids (IFB)

## Trigger event(s) for any solicitation:

- Any single purchase with value = > \$100K (exception: Single Source Justifications)
- Pending expiration of any existing Price Contract for ongoing needs
- Repetitive purchase of goods or services with aggregate value > \$100K annually
- Any need for Personal Services Contract with value = > \$10K
- Commodities requiring a solicitation regardless of the \$ amount as required by law (e.g., printing)
- Other cases where the Purchasing Officer ascertains a solicitation would generate value

## Identify whether to use Invitation for Bids (IFB) or Request for Proposals (RFP)

Use the Invitation for Bids for:

- Purchase of a single order or development of a Price Contract for well-defined goods or services. Items can easily be described by product or catalog numbers, fixed specifications, order quantities, etc.

Use the Request for Proposals for:

- Generally more complex services or cannot be easily defined or specified. In many cases, the department may not be able to clearly define needs, but wants to survey the market and determine what solutions are available
- Any purchase of Personal Services (consulting, design, engineering, etc.) = > \$10K

## Steps for Invitation for Bids (IFB)



Develop the initial specifications for goods or services. This may be listed as the product specifications on a Shopping Cart/Requisition or quote, an expiring Price Contract, or email communication from department.

If the IFB will be a one-time bid for goods or services, it is termed a **K-bid** and will be stored in 1-One Time Purchase Bids and RFPs folder on the j: drive as a project.

If the IFB will result in a Price Contract for repetitive purchase of goods or services over time, it is termed a **UK-bid** and will be stored in the 2-PCT Bids & RFPs.



Within the correct j: drive area, make a dedicated folder for the IFB within the current year. Store all documents affiliated with the IFB here.



From the 9-Stationery folder, find the current templates to use for the IFB. Open the IFB and Vendor List templates. Save As copies to the IFB project folder. Use the same naming convention as on other IFBs.



Email the Bid Clerk requesting a bid number for your IFB once enough basic information is known. The Bid Clerk will need title, issue date, opening date, and department. If the opening date is unknown, you can request this after the IFB is developed and prior to issue. The conventional duration for IFB responses is 14 calendar days.

**Note:** No solicitations are opened on Mondays or days following holidays.



Complete fillable sections of the IFB header. Complete other portions of the IFB Special Conditions as needed. If the IFB is for a one-time purchase, remove the clauses affiliated with Contracts within Special Conditions.

<input type="checkbox"/>	<p>Complete the Bid Proposal Form with information on the goods/services. Include all specifications, quantities, delivery or other requirements for the item(s). If quantities are known, make columns or table outline adding UOM, unit prices, and cells for line item \$ extensions.</p> <p><b>Note:</b> If at all possible, be sure to place a Grand Total blank at the bottom for bidders to enter their total. This is important and will allow for the public reading and easier completion of the Tabulation Sheet later.</p>
<input type="checkbox"/>	If applicable, prepare any attachments or appendices affiliated with the IFB. Name documents as applicable and place in the IFB project folder.
<input type="checkbox"/>	If this is a UK-Bid for a Price Contract, email Risk Management with a copy of the IFB and inquire if the standard University insurance coverage applies or whether any additional insurance requirements are applicable.
<input type="checkbox"/>	<p>Complete the header portion of the Vendor List and list potential vendors that will be notified of the bid issue. Sources of vendors may include department suggestions, web searches, vendors/bidders from previous solicitations for same or similar services, etc.</p> <p>A minimum of one (1) Diverse Supplier must be included on the Vendor List</p>
<input type="checkbox"/>	Share bid draft, Vendor List, and attachments (if applicable) for review with department and ask them to confirm that the Bid Proposal Form specifications and requirements are correct or whether changes are needed.
<input type="checkbox"/>	<p>Perform final review:</p> <ul style="list-style-type: none"> <li>-Completion of all applicable entries/blanks, spell check, proofreading, needed page breaks, etc.</li> <li>-Is the formatting correct/consistent and does the document have a formal appearance?</li> <li>-Does the solicitation make sense to potential bidder(s) and do they have enough information to provide a sound bid response?</li> <li>-Be aware of "should/must/will/shall" language usage. If absolute language is used, the bidder is required to comply. Likewise, non-compliant bidders are subject to rejection.</li> </ul>
<input type="checkbox"/>	Email the completed IFB, Vendor List, and any attachments (if applicable) to your Purchasing Manager for review/approval.
<input type="checkbox"/>	If approved by the Purchasing Manager, email the completed IFB, Vendor List, and any attachments (if applicable) to the Bid Clerk for final review and posting. If approved, the Bid Clerk will request posting to the Purchasing website.
<input type="checkbox"/>	<p>Notify parties on Vendor List of the solicitation with access to Purchasing bid page.</p> <p><b>Important:</b> If you notify multiple vendors via email, be sure to place your own email address on the To: line and the vendor emails on the Blind Carbon Copy (BCC) line. It is important that vendors are not advised of who is competing for the solicitation and the BCC tool will prevent this visibility.</p>

#### **Bidder Questions During Public Posting**

<input type="checkbox"/>	<p>Answer any questions for bidders while the bid is publicly posted. You may need to consult the department if questions are specific to the specifications.</p> <p>If answers are contained in the IFB already, simply point the bidder to the section for reference.</p> <p>Any questions that may allude to altering bid specifications or are relevant for the potential bidder community as a whole should result in an Addendum to clarify as needed.</p> <p>In keeping with confidentiality, bidders and departmental staff may not communicate at any point during a bid event.</p>
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Addenda may be needed during the public posting period for various reasons:

- It is learned that specifications are not clear or well defined
- Opening date may need extended
- Other reasons as ascertained by the Purchasing Officer

If Addenda are needed, use the following steps:

- Pull the IFB Addendum template from the stationery folder, name, and Save As to the IFB project folder
- Complete addendum header and body information with the change(s)
- Request Purchasing Manager to review the addendum
- If approved, forward to Bid Clerk for final review and posting to the bid page
- Be sure to notify all vendors on the Vendor List of the addendum issue

**Note:** If the addendum includes a date extension, consult the Bid Clerk to ensure the new proposed date is available on the bid calendar. If multiple addendums are issued, number them in sequence.

### **Bid Due Date and Opening**



Physical bid responses are received into Central Purchasing until the opening date/time. Each submission is time stamped and held with the Bid Clerk.

Bids are publicly opened on the Opening Date typically by the Bid Clerk or similar Purchasing staff employee.

Bid Clerk stamps the responses as Open and Read and records the respondents on the Vendor List

Bid Clerk transfers the IFB folder and responses to the Purchasing Officer

### **Evaluation**



Using one of the templates in the Stationery folder (or similar form), the Purchasing Officer or Team Member prepares a Tabulation Sheet summarizing the responses. Locate the Tabulation Sheet in the IFB project folder.

- Record items from the Bid Proposal Form along with pricing responses from each submission
- If convenient, arrange submissions from left to right based on low to high bids
- Consult tabulation sheets from previous IFBs, if needed, for guidance
- If a bidder does not bid all items, indicate the bid total as Incomplete Bid
- If a bidder bids any alternate item(s), indicate as Alternate Item(s) on the Tabulation Sheet



Evaluate whether the lowest bidder meets all requirements of the IFB. This must include the correct specifications, delivery date, other requirements, etc.

- Consult your Purchasing Manager for guidance if lowest bidder(s) do not meet requirements before disqualifying them and/or if any alternative bid submissions need to be considered.
- By law, bid awards must be made to the lowest responsive/responsible bidder(s)
- Upon completion of evaluation, inform the department of the intended awardee(s) and determine if they have any concerns. In some cases, the department may need consulted to assist with the evaluation.
- The Purchasing Officer indicates the intended awardee(s) on the Tabulation Sheet and signs and dates it.



**Important:** Examine all IFB submissions to determine whether a Bidder indicates or claims material to be Confidential or Proprietary in any manner. If any are marked as such, prepare a Confidentiality Claim Form from the Stationery folder. Send to the Bidder requiring their review and signature. Store the signed copy in the IFB project folder. This must be completed before any award is made.

## Award

☐ If the IFB results in a one-time purchase order, proceed to process and award the PO.

If the IFB results in award of a Price Contract, proceed to create and award:

- Create a sub-folder inside the UK-Bid folder to hold contract documents
- Using a PCT template from the Stationery folder, complete and create the UK Price Contract
- Complete the PCT cover sheet and use pages from the IFB and the awarded vendor(s) response to form the UK Price Contract document
- Setup the document in Adobe e-sign in the following order: 1) Awardee 2) Purchasing Officer 3) Purchasing Manager 4) Chief Procurement Officer
- Ensure to obtain a Certificate of Insurance that meets all requirements
- Permanently house the fully signed copy of the UK Price Contract within the Price Contract folder

## Close Invitation for Bids

☐ Use the Closing Instructions for IFBs (within the 9-Stationery folder) for steps to close the IFB

**Important:** Be sure to follow the steps accurately to complete the IFB and create the official file. Remember all documents are subject to Open Records Requests. Also ensure to mark any items that respondents indicated as Confidential or Proprietary.

If you awarded to any bidder other than lowest responsible, responsible bidder(s), you must document the rationale for the permanent official record.

- Use the Memo-to-File document from the IFB Stationery folder and place it in the IFB project folder.
- Document clearly the review and decision-making for exclusion of any low bidder(s)
- Both the Purchasing Officer and Associate Director/Purchasing Manager must sign
- Use the Memo-to-File also to document any irregularities or other notes pertinent to the evaluation or overall conduct of the IFB process.

**Important - Closing Out:** Ensure a complete paper file is given to the Bid Clerk which will be checked and filed by the Bid Clerk in the master file cabinets located in 322 Peterson Building.

☐ Notify respondents that the IFB evaluation has been completed, awarded, and closed and list the awardee(s). Use the Award Courtesy Letter template from the IFB folder. If using email to notify multiple respondents, remember to use the Blind Carbon Copy (BCC) option when listing email addresses.

Post Award - Consult a Purchasing Manager, as needed, for any post-award inquiries from bidders or other parties. In some cases, inquiring parties may need directed to the UK Open Records process.