**X. Bidding and Award**

1. In-house review – see list in Design Development
2. Customer signoff
3. Procurement matrix & bid coordination
4. Award
5. Board of Governor Review/Approval
6. **Post-bid interview/qualification of apparent lowest bidder(s)**
7. **In-House Review – see list in Design Development**
8. **Customer Signoff**

**What Is It?**

* **Xxxx**
  + Xxx
* **Xxx**

**Who Is Involved?**

* Xxx
  + Xxx

**How/Process: subtitle**

* Xxx
  + Xxx

**Checklist**

* Xxx
  + Xxx

**Timeline Considerations**

* Xxx
  + Xxx

**Forms**

* Xxx
  + Xxx

**Filing**

* Xxx
  + Xxx

1. **Procurement matrix & bid coordination**

**What Is It?**

* The procurement matrix is a form that is used to identify key dates and project information (form 1). The matrix then uses this information to auto populate information into the project manual (form 2). The matrix also fills in the list-serve notice (form 3), pre-bid meeting minutes (form 3), addendums 1, 2 and 3 (form 2).
* Bid coordination includes the portions of the planning and design effort that need to be identified to potential bidders. Items include the project bid and completion schedule, project scope and coordination with the building users and other on-going projects with the building.

**Who Is Involved?**

* Initially the project planner and project manager make a request to procurement. This request goes to Paula Reyes for a buyer to assist with the bid. (e-mail request, form 3)
* Final construction drawing (form 4) and specifications (form 5) are provided by the project designer. The documents are coordinated with the purchasing Request for proposal. The specification table of contents is a continuation of the Request for Proposal table (form 6). The designer’s technical specifications goes immediately behind the Request for Proposal within the purchasing RFP.
* The form of proposal is edited to capture the Lump Sum or Unit Pricing required for the project including any required alternates.

**How/ Process**

**Checklist**

**Timeline Considerations**

**Forms**

* Form 1 - <http://purchasing.wayne.edu/forms.php>
* Form 2 - . FPM\_Shapero\_Hall\_Lecture\_Room\_Upgrade\_2013\_R2
* Form 3 - 066-227885 5435 Woodward - Masonry Facade Stabilization
* Form 4 - W:\FPM Design Const Services\Building Projects\050\_Shapero\_Hall\050-239638\_Lecture Room\_100\_Upgrade\3.0\_Project\_Dwgs\_Specs\Issued\_Progress\_Dwgs\1.0\_WSU\_Bid\_Docs
* Form 5 - W:\FPM Design Const Services\Building Projects\050\_Shapero\_Hall\050-239638\_Lecture Room\_100\_Upgrade\3.0\_Project\_Dwgs\_Specs\Issued\_Progress\_Dwgs\1.0\_WSU\_Bid\_Docs
* Form 6 - 
* Form 7 –

**Filing**

* Follow D&CS filing protocol.

1. **Award**

**What Is It?**

* **Xxxx**
  + Xxx
* **Xxx**

**Who Is Involved?**

* Xxx
  + Xxx

**How/Process: subtitle**

* Xxx
  + Xxx

**Checklist**

* Xxx
  + Xxx

**Timeline Considerations**

* Xxx
  + Xxx

**Forms**

* Xxx
  + Xxx

**Filing**

* Xxx
  + Xxx

**e) Board of Governors Review/Approval**

**What Is It?**

* Board of Governors approval must be obtained for projects that will be over $100,000 for design or over $500,000 for construction.

**Who Is Involved?**

* Planner (design phase)
* Project Manager ( construction phase)

**How/Process**

* Prepare “Board paper” to describe the scope of the project and funding requested and funding sources. Submit to director for Director for editing and submission to Asst AVP and AVP

**Checklist**

* Check schedule of meetings for Board of Governors at: http://bog.wayne.edu/meetings/

**Timeline Considerations**

* Since the Board meets approximately every 6-8 weeks, submittal to the Board needs to be planned carefully so approval will be achieved when your project will need funding in place to begin work. Coordinate bid due date with Board of Governors meetings. It is preferred to have bids received and evaluated to present a more finalized budget for Board Aproval

**Forms**

* BOG template can be found at the following link along with several examples:

:W:\FPM Design Const Services\Toolbox\DCS\_Dept\_Misc\_Resources

**Filing**

* W:\FPM Design Const Services\Building Projects\building number\_Building name \project number\_project name \1.0\_Project\_Management\C\_Financial\_Docs\BOG\_Papers

1. **Post-bid interview/qualification of lowest apparent bidder**

**What Is It?**

* Review of bids received
* Interview contractors to confirm their ability to successfully complete the project ( staffing, experience, evidence of full review of project documents, schedule etc)

**Who Is Involved?**

* Purchasing agent
* PM
* Planner
* Apparent lowest bidder (s)

**How/Process: subtitle**

* PM coordinates a meeting with the apparent lowest bidder or bidders based on bid tab provided by Purchasing following bid opening

**Checklist**

* Review bid proposals (received from Purchasing after bid opening)
* Review bid tab to ensure all parameters are evaluated ( eg base bid + alternates etc) to determine lowest bidder

**Timeline Considerations**

* Needs to be scheduled as quickly as possible after bids are submitted so KPIs for contract award can be attained.

**Forms**

* Bid tab ( received from Purchasing)
* Post-bid interview agenda (Toolbox)

**Filing**

* Xxx

**Filing**

* Follow D&CS filing protocol.

1. **Subtitle**

**What Is It?**

* **Xxxx**
  + Xxx
* **Xxx**

**Who Is Involved?**

* Xxx
  + Xxx

**How/Process: subtitle**

* Xxx
  + Xxx

**Checklist**

* Xxx
  + Xxx

**Timeline Considerations**

* Xxx
  + Xxx

**Forms**

* Xxx
  + Xxx

**Filing**

* Xxx
  + Xxx