Pre-Bid Open

* Send out Ad for Bid (<https://mycityofmadison.com/User-> then go to Manage email lists after login) once a week when new contracts available.
* Update planholder list (PHL) daily
	+ Copy all entries, delete email, address, and phone number columns
	+ Sort by column B then A and compare to original
	+ Transfer any new names to the Excel spreadsheet page
	+ Save as pdf then Add Document under My Profile🡪 Public Home Page link
* *Time Saver* at Bid Open: Create a pre-prequalification list from the PHL list the week before the bid opening. [F:/Encommon/Alane/Forms/Pre-Prequal Checklist.xls available for use] Send to Contractprequalification@cityofmadison.com and Martha White mewhite@cityofmadison.com so they know who to prioritize.
* Set-up Bid Open tab spreadsheet (use template Bid Opening 2021.xltx), Sharepoint folders, and Bid Tabs (use template nnnnBid Tab.xltx) for each contract. *[Encommon-Alane-Tools-Templates for spreadsheet and bid tab or Tools-Instructions for Sharepoint Folder How-To]
Save Bid Open tab to Encommon-ConstructionSection-BidOpening.
Suggestion- Save bid tabs to Encommon-Alane-Contracts-BidTabs*
* Set-up partial payment spreadsheet for engineering contracts week of the opening. (Template available: std-par2-Summary-Tables.xltx)
	+ Contract name, contract number, account numbers, and page numbers.
	+ Paste special (values) proposal into template. (Enroot/PubCont/Proposals or Specs) Get account numbers and splits from engineer if not shown.
	+ Wrap text in column B
	+ Add sub totals and contract totals
	+ Fill under account numbers and under headings 4, 7, 9, and 11.
	+ If more than 5 accounts, add to the bottom tables, copying appropriate sections. Otherwise update data ranges to the new subtotals. Update Contract Total.
	+ Split traffic control and mobilization over main 4 accounts if applicable. (Street, Storm, Sanitary, Water)
	+ On Pay App tab add Engineer name, contract number, and number of pages for spreadsheet A in column M.
	+ *Save to Encommon-Alane-Contracts-Partial Payments*

Bid Open Day Sequence

* Save last plan holders list to W drive
* *Time Saver* – Set up SBE and Bid Open emails in the morning. (Templates: Bid Open Tab.oft and SBE Information.oft) Update Bid Results page with the bids to open. Put “To Be Determined at Bid Opening” in the Apparent Low Bidder column.

**Bid Opening Checklist (Detail)**

Between 2:00 and 2:20 p.m., Check prequals and prepare the bid opening sheets.

* Fetch bids and enter company names in Excel bid opening sheet – See F:/Encommon/Construction Section/Bid Opening
(*Time Saver* - Open each contract up in BidExpress (BE) as a separate window to save time – ctrl+N)
* If there are any single bids, tell John Fahrney. If unavailable call Rob Phillips (cell: 235-2312), or Greg Fries
* Look up company names on prequal check list. If not shown, look up names in Accela. Search – Business Name – Submit or enter - Click on latest Prequal as License Type, then under Engineering Reports select Prequal Contractor Application. Check expiration date, category Type (A, B, C), certificate of insurance expiration date, and category (page 2)

*Must be Active 2019 or 2020 in category B and in codes listed on bid open sheet.*

* If not active, email contractorprequalification@cityofmadison.com to confirm status.
* Type in OK on the bid opening sheet if no issues and PENDING for others until hear back from downtown.
* Print prepared sheets (last column showing Prequal results – hide any other columns to the right) and combine before making copies for distribution (1-2 more than names on sheet as guideline for number of copies).
* Enter engineering estimates into Bid Express in the Manual Bid section.
* Enter the names of any manual bidders into the Manual Bid section.

Save any envelopes that manual bids came in. (even though I am not sure why….)

Set up in Training Room no later than 2:25 pm in order to be ready by 2:30 pm…

**Bid Opening**

John will start opening bids at 2:30 pm. Second person can do the same for the remaining contracts. (*Time Saver*: Ctrl+N for multiple windows) Click on contract name, then fetch bids. Click open all bids and switch to next contract name in new window – repeat.

***If there is only one qualified bidder, DO NOT POST ANY $ VALUES to Bid Express or City website until decision to award has been reached!!! However, exception could be if below estimate and AA nor required (or has been approved). See John first.***

After Opening, check the bids of the two lowest bidders:

***Note – if determine there may be a reason to reject a bid, send the information to John Fahrney so he can make that decision. Mark “Bid Under Review ~~- Potential Bid Error~~”.***

**1) Go to Section E.**

If manual submission, the number of any addendum must be marked on the form. (I often mark it on the expanded copy, but can be found on Bid Express (BE) as well) If electronic, must either be checked off on line or noted in the upload. Note if there is an addendum and is not acknowledged, determine if minor or major addendum. See How To – Potential Bid Error.doc for categories, but confer with John first. Refer to *Post Apparent* Section for reporting procedure.

On manual submissions it is OK if contract title and number are not there. Can add later.

Check to see if the following is filled in - company name, State, City, signature, title.
Next check that notary has signed, dated (x2), and stamped form. Double check that the commission did not expire before the date sworn and subscribed by.
Note – Stamp not visible on electronic form if contractor uses an embosser and doesn’t shade it.

If notary didn’t sign, it must be done before contract goes to the Board.

**2) Go to Section F:**

Sometimes the contractor doesn’t select a trade on page 2 or enter a trade in section 1. This information can be obtained after the bids have closed, but before recommendation to award.

**3) Section B:
If manual submission**, enter the bid items in Bid Express (BE). Click on company name and scroll down to section B. Enter numbers, then tab to the next. Double check typing if totals don’t match. Save before returning to main screen.

If bid item is missing, the bid cannot be accepted. Mark as under review and confer with John first. If there is a math error, contractor should be notified later of the reason for reporting change.

**4) Go to Section G:**

***Standard Specs and BE section G state that this should be on the City of Madison bond form. If AIA or NASBP provided, this is cause for rejection as non-responsive, as terms are different from City’s form. Any others would need Doran’s review before proceeding.***

If a bid bond is attached, look up the license number provided by going to this site: <https://sbs.naic.org/solar-external-lookup/>

Enter the number and check that the name matches and that the insurance company is listed. You may have to enter the name, as not everyone seems to know their National Producer No. (If name doesn’t match, contact John to get attorney’s opinion. If insurance company not listed, the bidder must provide a new bond by end of day (or earlier) on Friday with signatures of an agent who is listed.) Check to see that bonding agent’s name is on Power of Attorney. If not get attorney’s opinion. If no power of attorney attached, bid is rejected.
There should be at least one bonding agent signature. No embossing or seal required.

The bond must be signed on the “By” line by company representative and the bonding agent or it will be rejected. Confer with John prior to notification.

If you see something like “has not been attached as meets criteria” this means that they have a biennial bid bond. Go to F: encommon/construction section/biennial bid bond/current year (there are 2) to confirm this is true.

**CERTIFIED CHECK**: Bidders can also provide a certified check for the bonding amount. Keep locked until ready to return. Non-low bidders are given checks when the low bidder is recommended for award. I keep low bidders check until contracts are routed and signed to ensure there are no issues. Most bidders are OK with this. See Standard Specifications for official policy.

**5) Go to Section C:**

Bidder must fill out and supply pages C-6 and C-7. If SBE utilization is below the goal, then see if they provided any C-8 and C-9 pages. If yes, the information can be sent to Melissa Gombar in DCR.

If not, contractor has 2 hours to provide whatever page(s) is missing. Please see ***How To – Potential Bid Error.doc*** file for response categories. If the contractor did not provide any information at all. The bid cannot be accepted, but confer with John first.

Once an acceptable SBE packet has been identified, the information can be sent to DCR.

If manual submission, scan the documents and send to Melissa.
If electronic submission, open and “attach as an email” to Melissa.

 **6)** Lastly, check if the lowest bidder is **certified in the State of WI** by going to this site: <https://www.wdfi.org/apps/CorpSearch/Search.aspx>?.

Note –Living Landscapes is a sole proprietor – they won’t show on list, but are acceptable. If company is not on the State site, this must be resolved prior to the contract going to the Board, but is not a reason to reject.

Continue process above until 2 qualified bidders have been determined or list exhausted.

**Post Apparent and Bid Opening Tab**

If there are any issues that would make us throw out a bid, they need to be noted as such when “Posting Apparent” on Bid Express and on the Bid Opening Tab. Several posting examples available in the Bid Open Folder.

*1) Not Prequalified*

Manual submission – Click on Edit symbol in Manual section and add Pending Prequalification after their name. Mark as Not prequalified once decision reached.

Electronic submission – Click on green ribbon under Opened at date/time to make it orange. Add name to the manual section and add Pending Prequalification after their name. Mark as above.

*2) Not Responsive* – If bid thrown out for missing bid item, no POA, no acknowledgment of addendum etc…. **First level is Bid Under Review**. Proceed below after conferring with John. See examples in Bid Error section in Bid Open Folder.

Manual submission – Click on Edit symbol in Manual section and add Bid Under Review… or not responsive, whichever applies, after their name.

Electronic submission – Click on green ribbon under Opened at date/time to make it orange. Add their name to the manual section and add Bid Under Review… or not responsive after their name.

*3) Single qualified bidder –* Names of bidders only with no values. *To do this, c*hange green ribbon (if electronic) to orange and enter the company name in the Manual section with no values. Delete any values shown for actual manual bidders. Mark as Pending Approval in Bid Express and on Bid Open tab.
If decision made not to award – mark bid open tab with *Not Recommended for Award* and then add *Bid Opened – Results Not Posted*. Mark Engineering Estimate line in Bid Express as *Not Recommended for Award*.

If decision made to award or if under estimate and no AA issues– delete entry in Manual bid section and change orange ribbon to green. See John first for under estimate option. Re-post apparent.

NB - One instance occurred where single qualified bidder’s proposal was under estimate, but well above the other bidders. Rob requested that values not be posted in the future for this instance.

*3) If single bid, but not opened* – This is entered in the Manual section and then posted.

See 8212 for an example. On “Our Solicitations” menu, click Archive button upper right (in light gray to the right of Solicitations in blue) & go to page 5 or look in Bid Error section in folder

**To “Post Apparent**” go to upper left hand corner of screen and click Post Apparent button.

***Remember*** *– If open a single bid– do not post the $ value until decision to award has been reached.*

When it says do you want to include non-responsive bids uncheck the box.

Once bids have been posted, you can copy this information to the bid opening tab to save typing. Make sure the OKs for prequal are rearranged if necessary.

Comments can now be added to the apparent bids section – reasons for rejection perhaps.

Before leaving this screen – download bid tabs. Click on Actions, select View Bid Tabs - Standard, then Export Bid Tabulations – MS Excel. Save the file, view the download, and open. Copy and paste special the information on the “Item List” tab to the area specified in the form setup in F:/Encommon/Alane/Contracts/BidTabs. GO TO Bid Tabs for formatting et al…

**4) Bid Opening Tab**

Once all entries have been copied to the Excel file, create individual pdf files for each contract with the following naming convention: NNNNBidOpeningTab. Watch prequal OKs, arrange low to high.

Email Excel file to Bid Open distribution list after bid tabs have been posted to Sharepoint. (Christy, Bryan, Norman, Janet, Greg, Johanna, Heidi, Melissa, Lesley, Chris P., and Rob)

If a facilities contract, include Bryan Cooper. If a Parks contract, include Ann Freiwald. Include all engineers with projects opened this date. Note when bid tabs available before sending.

Save individual bid open tab files to W: /contracts/documents. If no access, ask Johanna or Heidi to help.

**5) Special Documentation?**

Download any special documentation included with bid and send to project engineer

**City Web Site:**

The apparent low bidders need to be posted to the website using Contribute.

*If you don’t have access, Johanna or Heidi can assist. This needs to be done after you send out the bid opening tab.*

**Bid Tabs**

Download files now if not done earlier.

Copy information on Item List Tab and paste special where indicated in the bidtab blank set up earlier in F:/Encommon/Alane/Contracts/BidTabs. Save.

Extend text highlighting in header line (gray3) and make total line same color.

Delete the Engineering Estimate columns.

On the totals line in column E delete a cell to shift the totals to the left.

Hide the extension columns for all companies that were not low bidder.

Adjust name spacing, pagebreaks, and headers as needed.

Save to F:Enroot/Pub\_cont/BidTabs so engineers can find them.

Create pdf and post to Sharepoint.

*Bid Tabs posting guidelines:*

***If single qualified bidder*** *–* do not post values to website until decision to award has been reached by all involved parties. Otherwise:

If bid has no SBE requirement and is **less than** 10% over the engineering estimate, post the bid tabs to the City Web site. If **10% over** estimate, wait for decision to proceed to BPW from downtown. (Heidi best contact – else BPWAgenda@cityofmadison.com )

If bid has SBE requirement and **less than** 10% over engineering estimate, wait until AA approves then post. (Melissa has until Tuesday noon following Thursday bid opening.)
If **10% over** estimate, wait until AA approves AND decision made to proceed from downtown. (Again ask Heidi or BPWAgenda@cityofmadison.com )

After Bid Opening Day-

Scan manual bids and save in Encommon-construction section-Public Works Manual Bids folder. Mark originals with date of scan and store non-low bidders in long-term storage box.

Contact companies that had potential bid errors. Mark any companies deemed non-responsive and repost to Bid Express, Bid Results, and send copy of new bid open tab to W drive and BPWAgenda@cityofmadison.com . If all bids rejected, indicate this in Engineering Estimate line in Bid Express. Mark bid open tabs accordingly.
See Bid Error section in Bid Open folder for examples. Email template available in Encommon/Alane/Tools/Templates

If not approved by AA

* Send AA the next lowest bidder’s SBE information
* Forward rejection letter to Greg, Rob, and engineer
* Bid Express – mark as non-responsible and repost
* Bid Open – mark as non-responsible and send to BPWAgenda@cityofmadison.com
* Repost Bid Open to web

After SBE approval and recommendation to award

* Send acceptance emails to BPWAgenda@cityofmadison.com , Greg, and engineer (Bryan Cooper/Ann Friewald if applicable)
* Enter contractor and unit prices into spreadsheets (col E)-2 total matches bid.

Add page breaks if needed. Send file to BPWAgenda@cityofmadison.com and save to Enroot-Part\_pmt.

* Print out Bid Express documents for lowest bidder (E, F, G, B, and C)
Copy paste section F to a Word doc or use Bid Express’ download option.
* Enter bidder information (name, $, CC date) into database and create Award Checklist.
* Enter information into front page, H-1, H-5, and I-1 Word documents using Word file in Enroot-Pub\_cont-Specs. Print multiple copies of front page (blanks- if for JF, Contractor Field Copy, Contractor Office Copy, Construction Office Copy, File, Original). Print the other 3 pages. Create a pdf with 3 copies of H-5 and another with 3 copies of I-1.
* Create first Pay App and print. Attach to spreadsheet, scan, and file.
* Assemble contracts for processing/distribution (scan E to I-1 for a bonding agent copy)
	+ 5 to route, 4 specs/5 plans to John if Engineering, 1 to Bryan
	+ 5 to route if Facilities, ask John if wants copies
	+ 5 to route for Water, Parking Utility, and Parks (ask engineer for copies to use)
* Award Checklist, First Pay App, Bonding Agent Copy, and New Vendor Application (if applicable) pdfs to Sharepoint.

After BPW approval

* Email Agreement, Payment & Performance Bond, Award checklist, bonding agent copy, first pay app (if Engineering), and new vendor information (if applicable) to contractor.
* Mail Contractor’s Field copy
* Distribute copies to John and Bryan if Engineering
* Save award checklist, bonding agent copy, and first pay app to Sharepoint if not already done
* Save non-low bidder SBE to Public Works SBE Packets Non Low Bid folder
* Archive closed contracts in Bid Express

Returning Documents

* Check H&I for the following:
	+ Signatures on both documents
	+ Contract name is correct and no changes have been made.
	+ Bonding Agent licensed for Surety. Print from SBS website. Circle Surety and the bonding agent’s name. Double check agent listing doesn’t expire before CC date.
	+ Date on H-5 is after Council date.
	+ Print both documents for Construction Office copy.
* Assemble/staple contracts to send downtown. Sticky notes on three H-1 contracts pgs. Include SBS printout of Bonding Agent and account breakdown from Legistar. If enactment date available include a printout of that as well. Routing note example below.
* Enter dates into the database.
* Subcontractor list:
	+ Scan and file in folder before entering date into database.
	+ Enter names, type of work, $ amounts, and trades (if applicable) in database.
	+ Calculate %s (Subcontractor Percents.xls)
	+ Add who must comply with BVC at bottom right – mark boxes. Create a Facility spreadsheet if large building contract and attach printed copy when complete.
	+ Check for contractor signature
	+ If ≤ 40% get John’s signature. If >40, email to BPWAgenda@cityofmadison.com (CC engineer) so it can be scheduled for the next BPW meeting. Once BPW approves, send to John.
	+ Once signed, scan to folder and web site. Enter date approved in database.
	+ Once completely approved save scan to Sharepoint.
* Send contracts uptown for routing after enactment date. Include any rush requests.

After CC approval (enactment date)

* Create and email award letter
* Print Legistar information for routing (contingencies et al)
* In partial payment spreadsheet, complete summary table with contingencies
* Track signature status in Contract Routing

Best Value Contracting (BVC): (see flow chart in BVC section of folder)

* Note if single, multiple, not-apprenticeable, or needs apprentice/exemption
* Request any apprentice information for City files (save to F:/Encommon/construction section/BVC/apprentice hired letters).
* Update database with company status (general and subcontractors).

Workforce Profiles (WFP) – where Davis-Bacon rules apply:

* Mark prevailing wage rate box if applicable. If box is missing, attach a check box blank.
* Check code vs wage rate
* If BVC, note if single, multiple, WATT, or needs apprentice/exemption
* Update database with company status.
* Partial payments can be made before workforce approval, if all that is left is prequalification.
	+ Update partial payment spreadsheet with the requirements.
	+ No company that needs to be prequalified can be on site until this is complete.
	+ No payment will be made if the company in question appears on the pay app.
* Send workforce approval letter once all company’s wages, BVC requirements, and prequalification steps have been completed.
* Update database with date and save to Sharepoint.

After contract signed: (**See Contract Routing Section in binder**)
Enter dates in database and send file copy to engineer if sent to Emil.

Let engineer know that it was signed and ask about start work letter date

If Start Work letter is requested before BVC compliance is determined, prequalification is complete, or WFPs are approved, note information needed prior to payment on spreadsheet and in the start work letter.

Mail contractor’s copy, start work letter, and first pay app to contractor after sending email notification. (Alane/Tools/Template folder has Start Work form letters as well as email templates)