OPERATIONAL SERVICES DIVISION

Job Aid:

How to Score and Award a Bid

This Job Aid shows how to:

- score and award a bid using the Bid Tabulation function
- create a Master Blanket Purchase Order (MBPO) for goods and services not on Statewide Contract

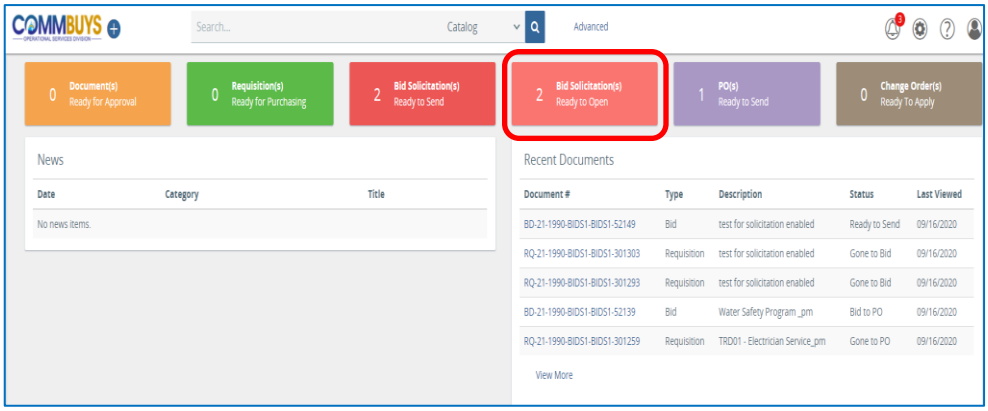
Of Special Note:

The entire process - bids, quotes, scoring guidelines, etc. - is viewable in COMMBUYS, which offers users the benefit of concise document management as well as an organized electronic procurement file. The Bid Tabulation function in COMMBUYS is used to review and evaluate vendor responses to bids (called **quotes** in the system).

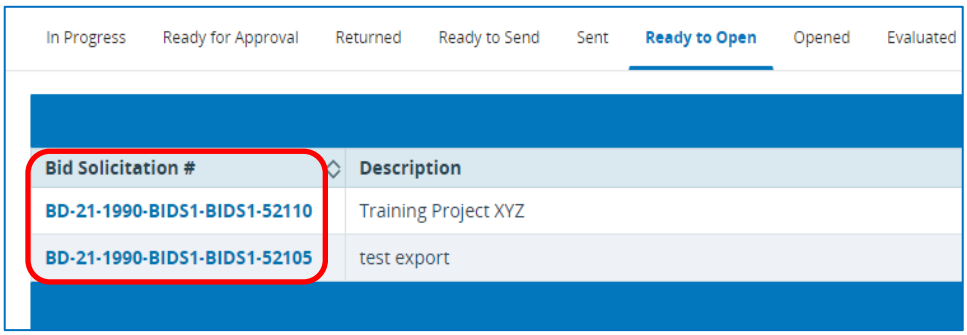
Users may continue to evaluate vendor responses according to their current practice. The results of this evaluation can be entered on a spreadsheet (or as follows current practice) and posted as an attachment on the Attachments tab.

COMMBUYS also provides an optional scoring tool that may be used as well. This Scorecard uses scoring criteria based on a weighting system of a total of 100. Each criterion will have a value (or "weight") assigned as a percent. The total of all criteria combined must equal 100%. The scores against those weights are recorded numerically from 1 to 100. After criteria are entered, the purchaser forwards a request to a group of approvers who use the criteria to evaluate (score) the bid.

Quotes that are received using the .csv (comma separated value) file template can be exported from COMMBUYS during the evaluation phase. Awarded vendors can be identified on the template and then uploaded back into COMMBUYS.

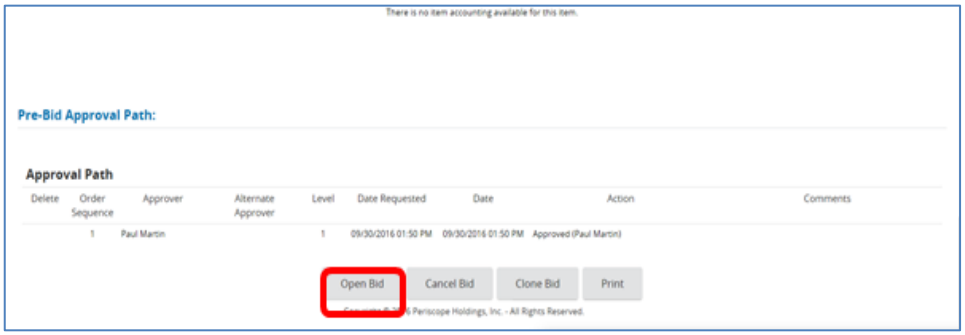
Screenshot	Directions
	**Step 1: Opening Ready to Open Bid Solicitations** From the Main Menu, click on the **Bid Solicitation(s) Ready to Open** box, or locate the bid in the Recent Documents box.

Screenshot	Directions



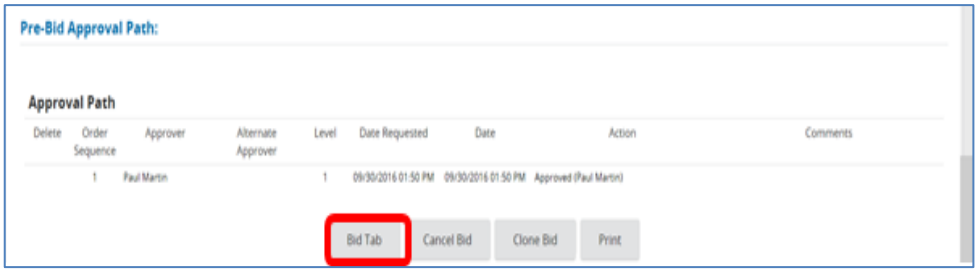
Step 2: Selecting the Bid

Click on the **blue hyperlink** of the desired bid in the Bid Solicitation# column.



Step 3: Opening the Bid

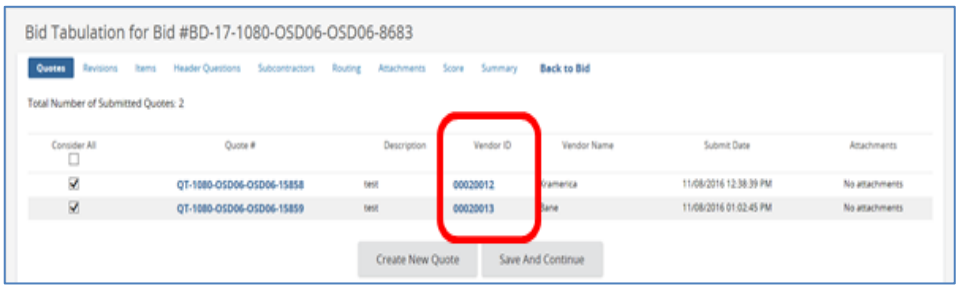
The Bid opens to the Summary tab page. Scroll to the bottom of the page and click on the **Open Bid** button.

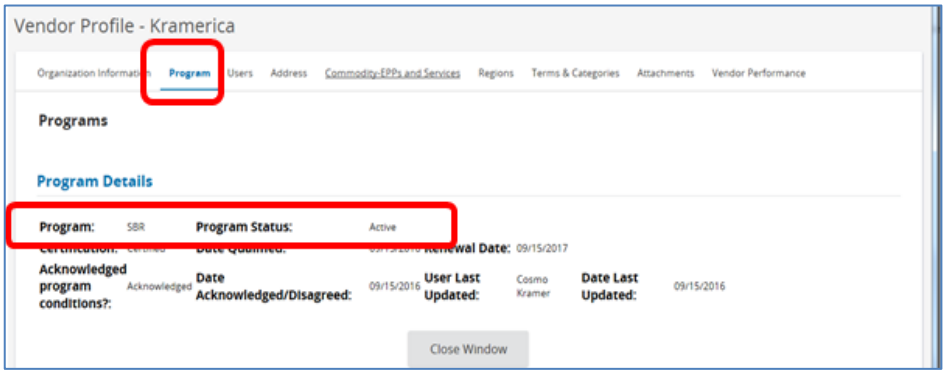


Step 4: Opening the Bid Tab

When the Summary screen redisplays, scroll to the bottom and click on the **Bid Tab** button.

Screenshot	Directions





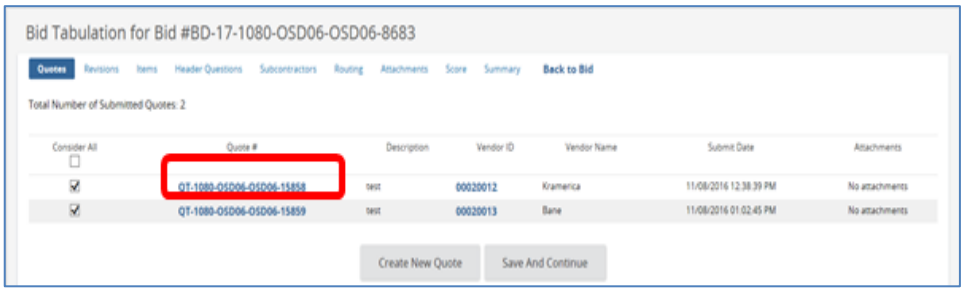
Step 5: Identifying Small Business Purchasing Program (SBPP) Vendors

The **Bid Tabulation** page opens displaying the list of all quotes submitted by registered COMMBUYS vendors for the selected bid.

If your procurement is a <u>small procurement</u>, ($250,000 annually or less), you must identify SBPP-active vendors. If your procurement is over $250,000 annually, **skip to step 6**.

In order to identify whether vendors submitting quotes are SBPP-active, follow these steps.

1. Click on a blue hyperlink in the **Vendor ID** column, which brings up that Vendor's profile in a separate window.
2. Click on the **Program** tab and see if the Vendor has the code SBR (Small Business Registered) and *Active status*.
3. Make a list of all SBR-Active vendors who have submitted quotes.

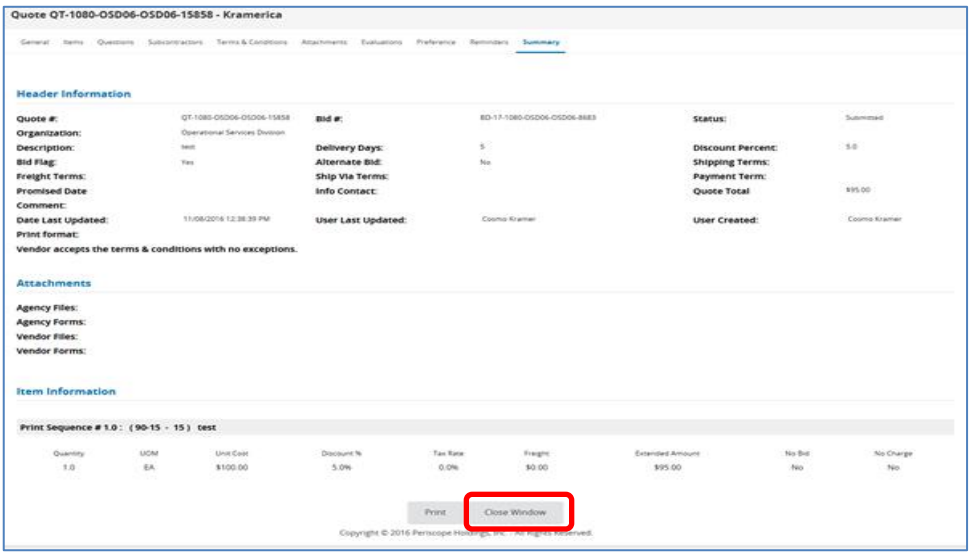


Step 6: Opening the Quotes

1. Click on the **Quotes** tab to review the bids prior to Score Entry.

Click on a blue hyperlink in the **Quote #** to open a vendor quote.

Screenshot	Directions



Step 7: Reviewing the Quotes

The quote opens in a new pop-up window to the **Summary** tab. All vendor quote information is stored in the displayed tabs.

1. Review all information in all tabs (including any submitted attachments) to evaluate the vendor quote.

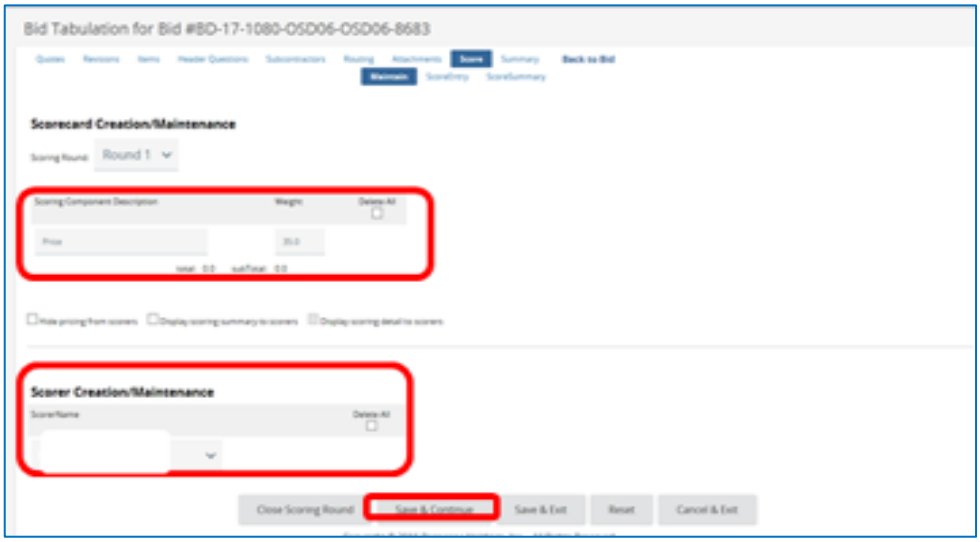
2. Click on the **Close Window** button.

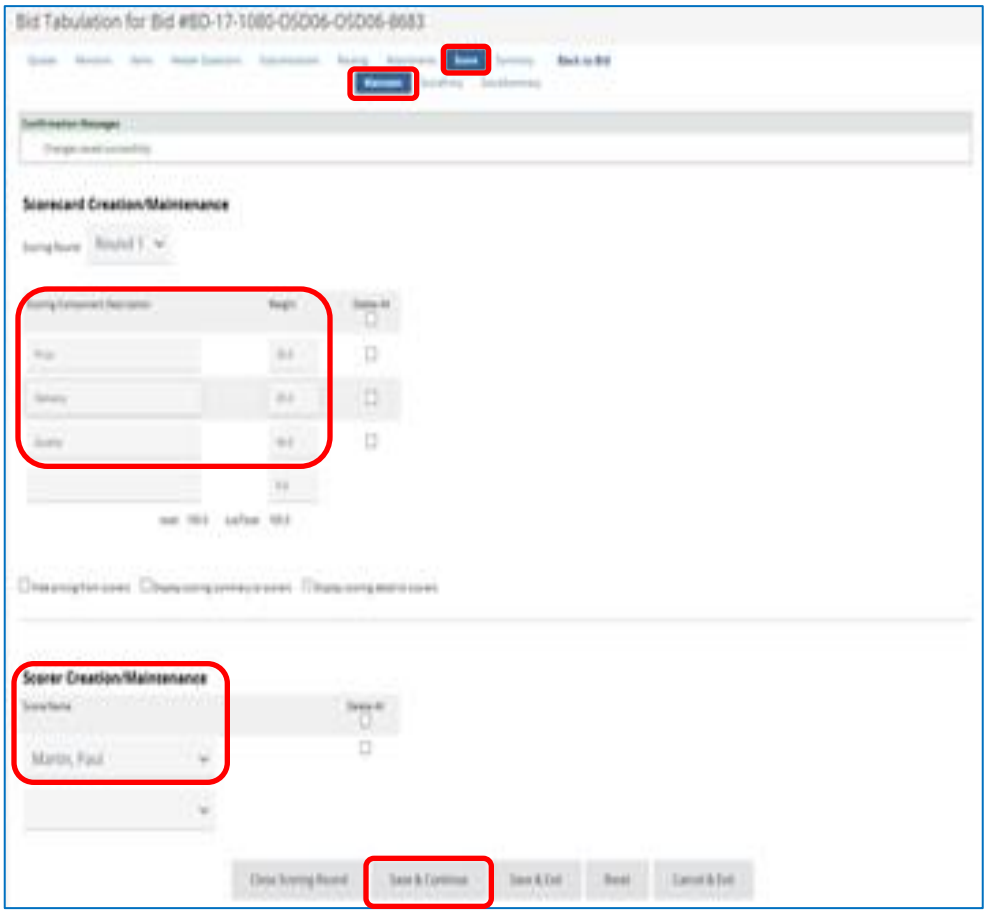
Repeat Steps 6 and 7 for each vendor quote.

NOTE: If you would like to use the optional COMMBUYS Scoring tool, **continue on to Step 8.**

NOTE: If the vendor has submitted quotes using the .csv template, **skip to Step 11.**

NOTE: If, after reviewing quotes you want to follow your established quote evaluation process, **skip to Step 14.**





Step 8: Completing the Score Tab

NOTE: The evaluation criteria entered here should match the criteria of the solicitation (RFR, etc.).

1. To begin the scoring and evaluation process, click on the **Score** tab. The Score tab consists of three sub-tabs:

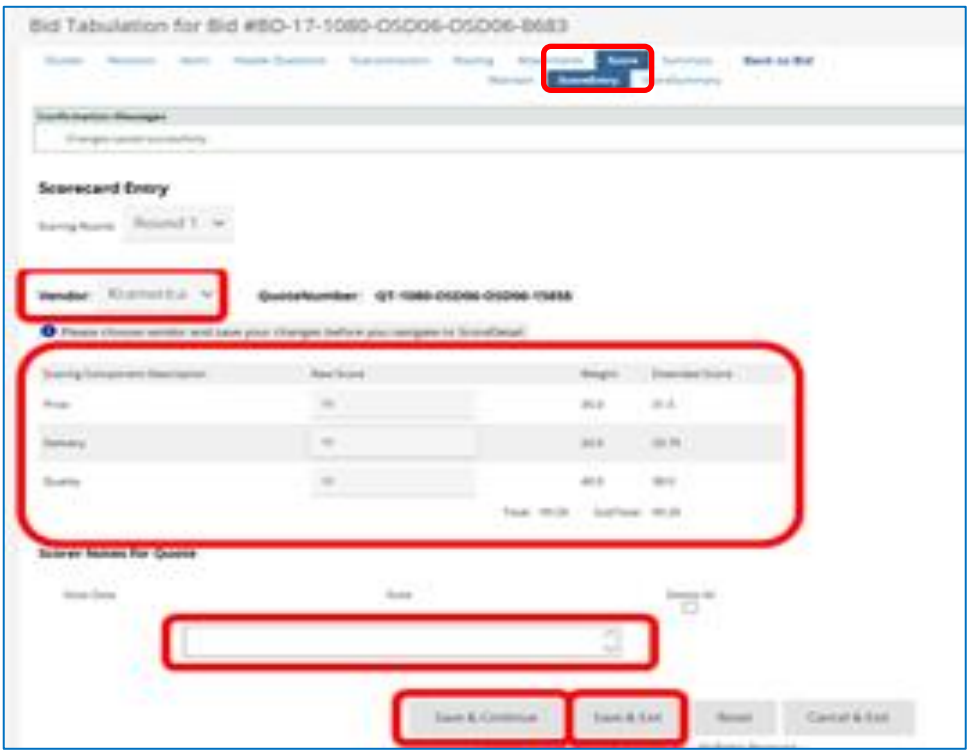
   Maintain – used to enter and display the criteria, criteria weights, and select scorers

   Score Entry – used to enter and display individual vendor scores based on vendor quotes

   Score Summary – displays a side-by-side view of all entered vendor scores

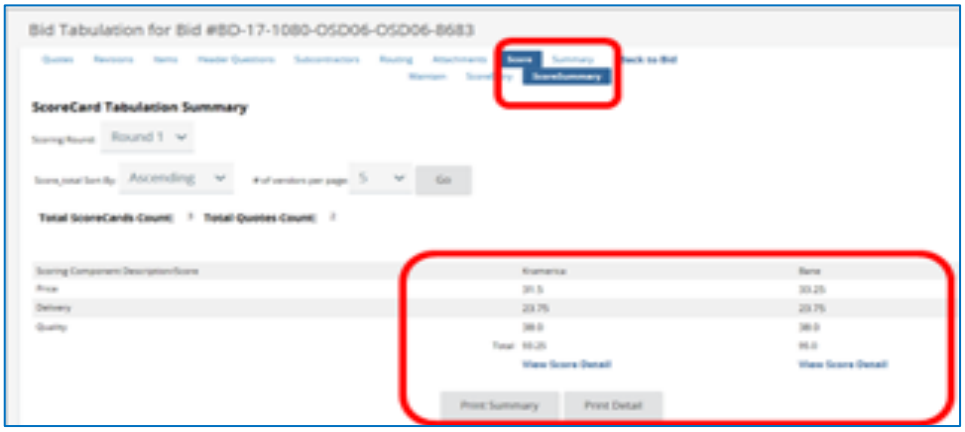
2. On the Maintain sub tab, enter a scoring criterion name in the **Scoring Component Description** field.
3. Enter a scoring weight percentage in the **Weight** field. The total of all weights must equal 100.
4. Click on the dropdown arrow next to the **Scorer Name** field and select a scorer.
5. Check the boxes that are applicable for your Bid evaluation:
   - Hide pricing from scorers
   - Display scoring summary to scorers
   - Display scoring detail to scorers
6. Click on the **Save & Continue** button

Screenshot	Directions



Step 9: Entering Scores

1. Click on the **Score** tab.
2. Click on the **Score Entry** sub-tab.
3. Click on the dropdown arrow next to the **Vendor** field and select a vendor from the dropdown menu.
4. Enter a score in the **Raw Score** field for each criterion. COMMBUYS will automatically multiply the raw score times the weight and provide an **Extended Score**.
5. If desired, enter notes in the **Note** field.
6. Click on the **Save & Continue** button.
7. Choose the next vendor from the vendor dropdown menu and repeat the process until all vendor quotes have been scored, then click on the **Save & Exit** button.



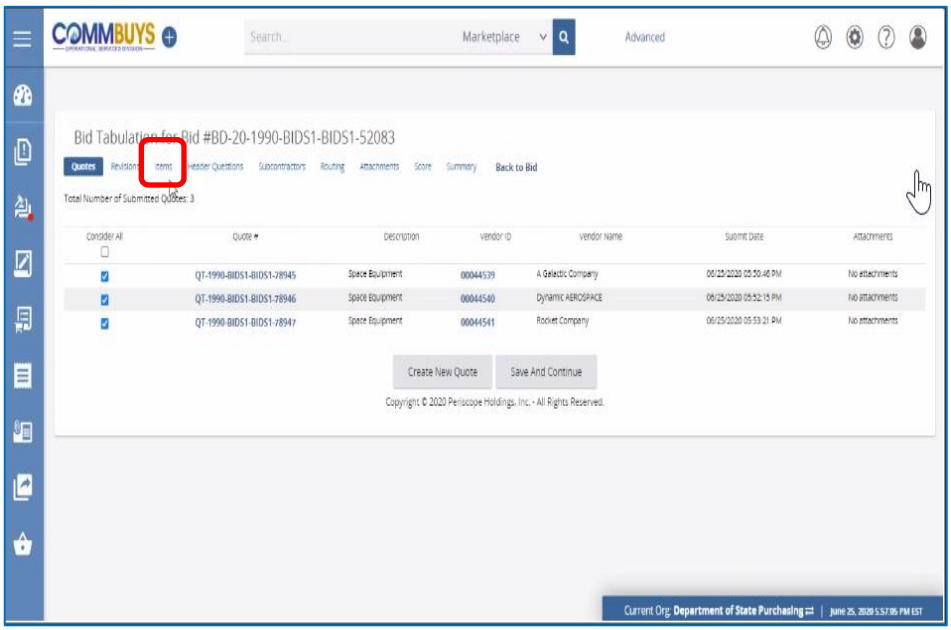
Step 10: Viewing the Scores

1. Click on the **Score Summary** sub-tab.
2. The **Score Summary tab** displays the weighted scores side by side for easy review.

Hyperlinks to **View Score Detail** are available for each vendor and buttons are available to **Print Summary** or **Print Detail**.

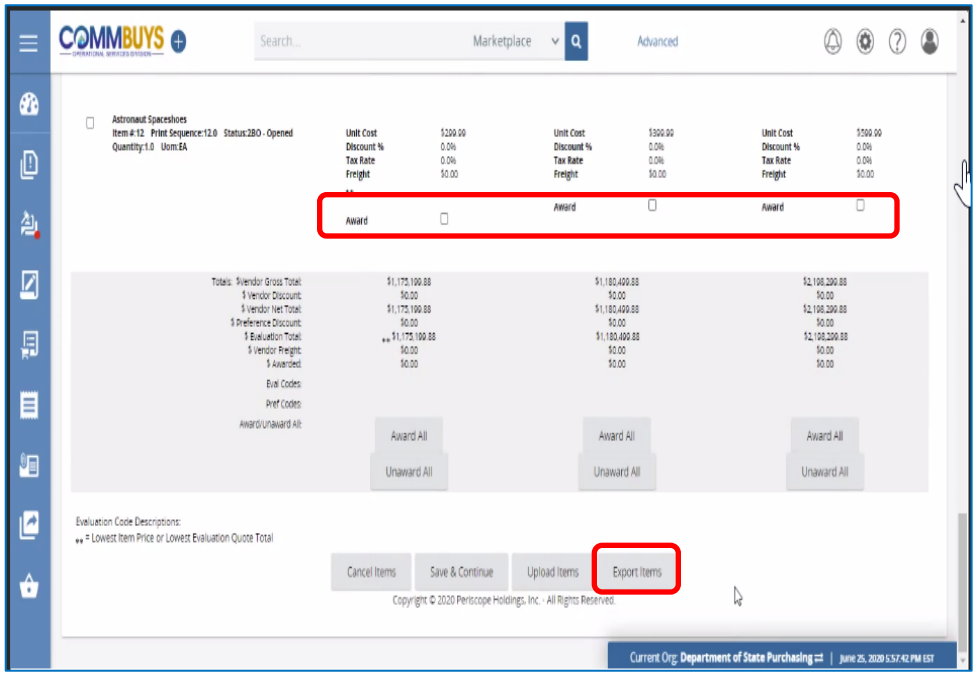
3. Now **skip to Step 14.**

Screenshot	Directions



Step 11: Using the .csv Template File

1. Click on the **Items** tab.



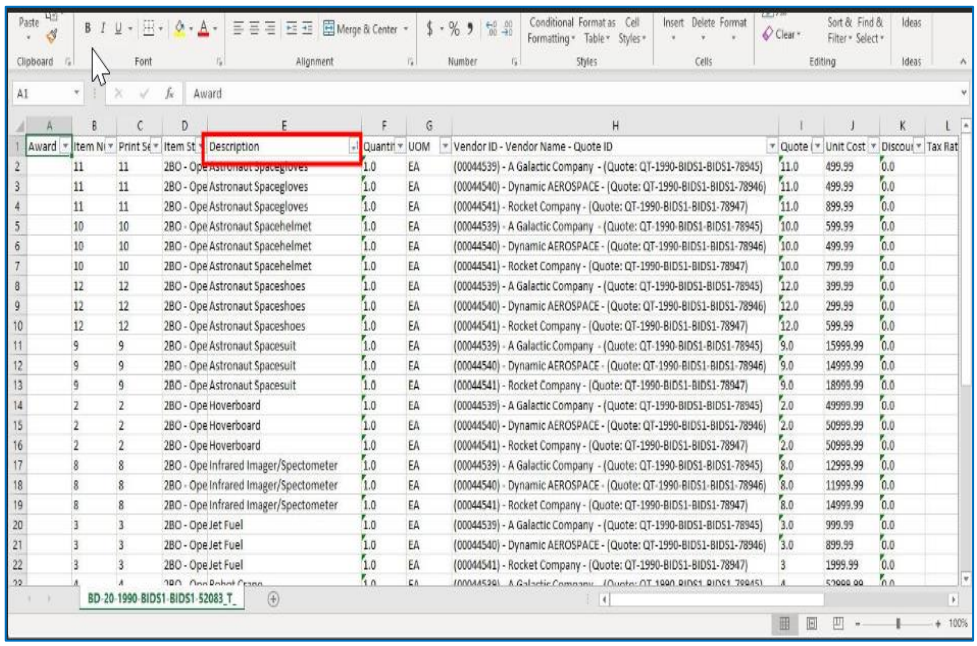
The entered price for each item displays below the vendor name. Items that have:

- an entered price, or
- are marked as “No Charge”, or
- are marked as “See Quote Attachment” can be selected for award.

2. Select the Award checkbox in the row and column for each item and vendor respectively.

NOTE: For Bid Solicitations that have large amounts of items with multiple vendors, you can select the Export Items button to view the quotes in a .csv file and award the items and vendors outside of COMMBUYS. Exporting the items provides a .csv file that may be shared with others on your bid review team who may not have access to COMMBUYS.

Screenshot



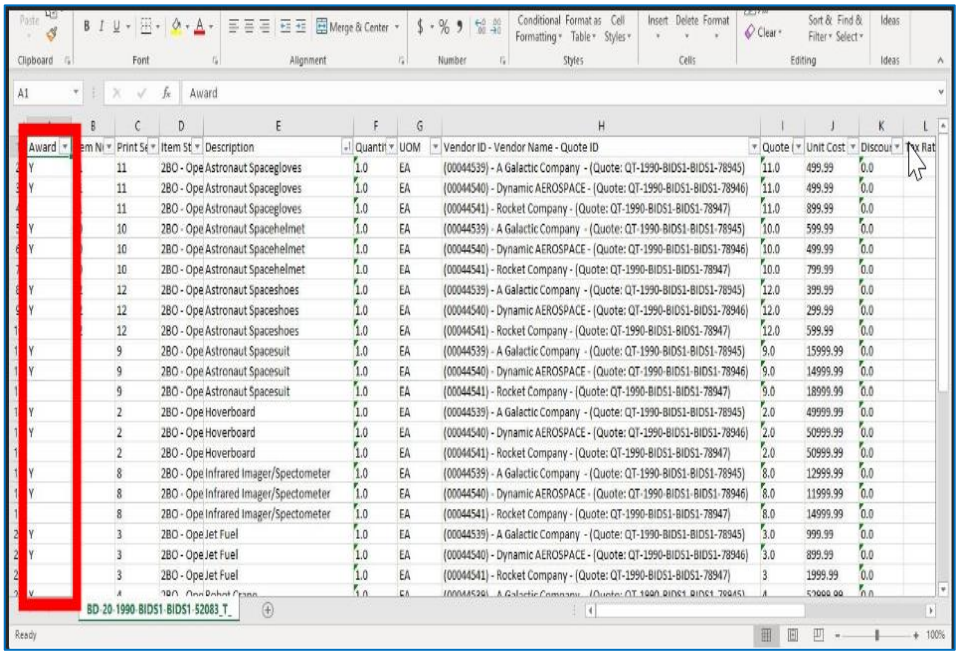
Directions

Step 12: Sorting the .csv File

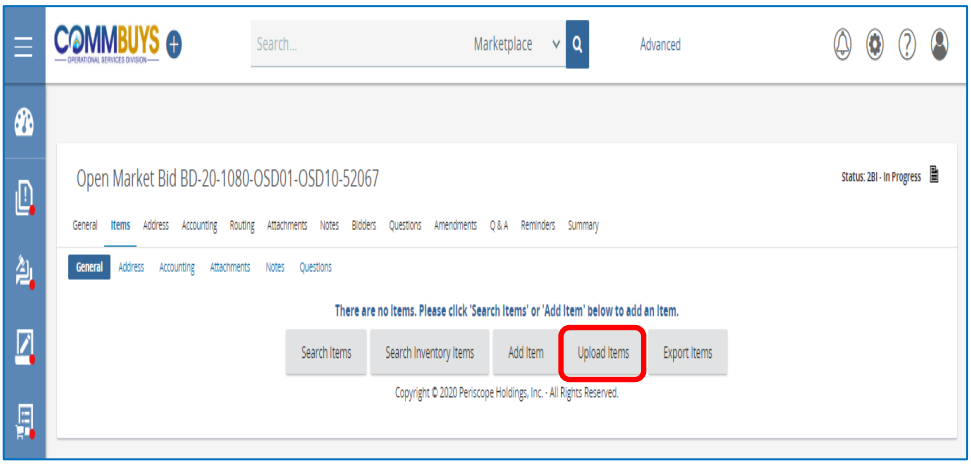
After exporting the items, the columns can be sorted.

In this case, the items have been sorted by Item Description.

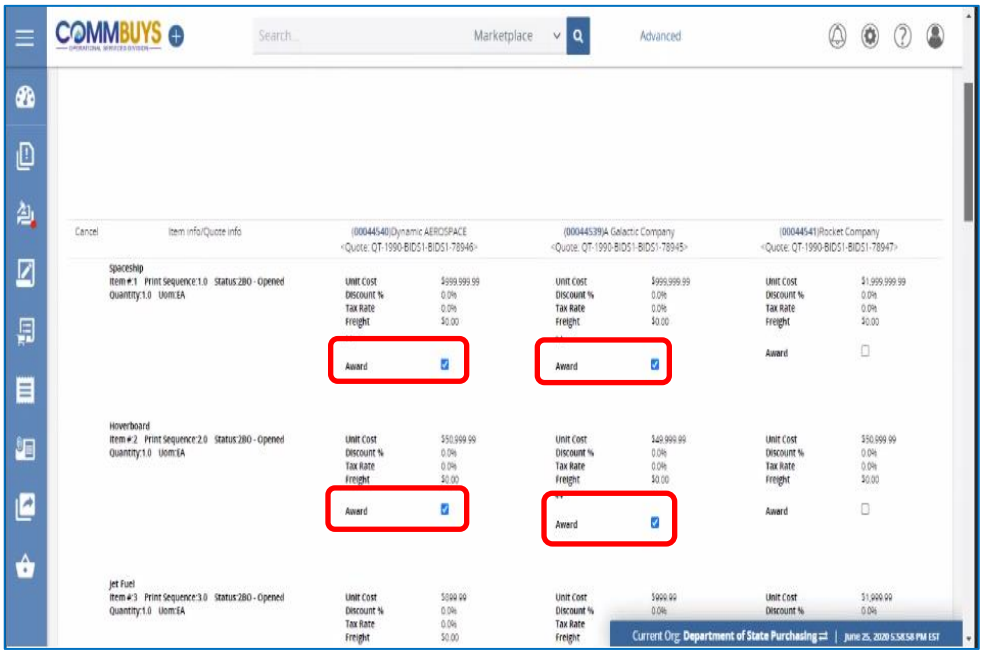
Step 13: Awarding Process



1. Place a “Y” (upper or lowercase) in the award column to make your awards. This can only be done for items that have a unit cost or are marked as “No Charge”. This feature protects the you from entering a different unit cost or from awarding a “No Bid” item.

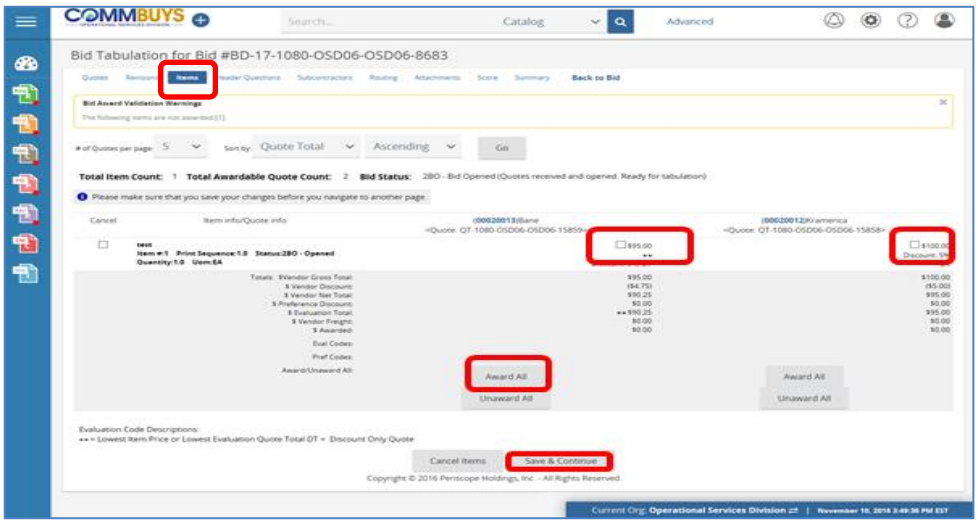


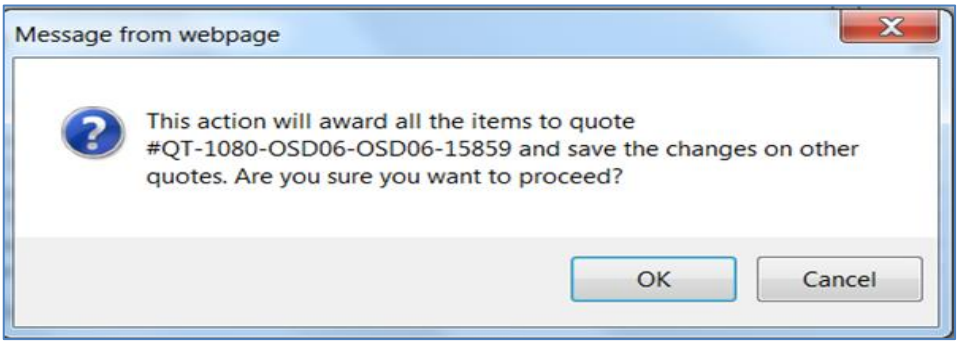
2. Save this file to your computer as a .csv file and upload back into COMMBUYS using the **Upload Items** button.



3. After the items are uploaded, the awarded items display with a checkmark. This award may then be submitted for approval. **Skip to Step 15.**

Screenshot	Directions





Step 14: Selecting Vendors for Award

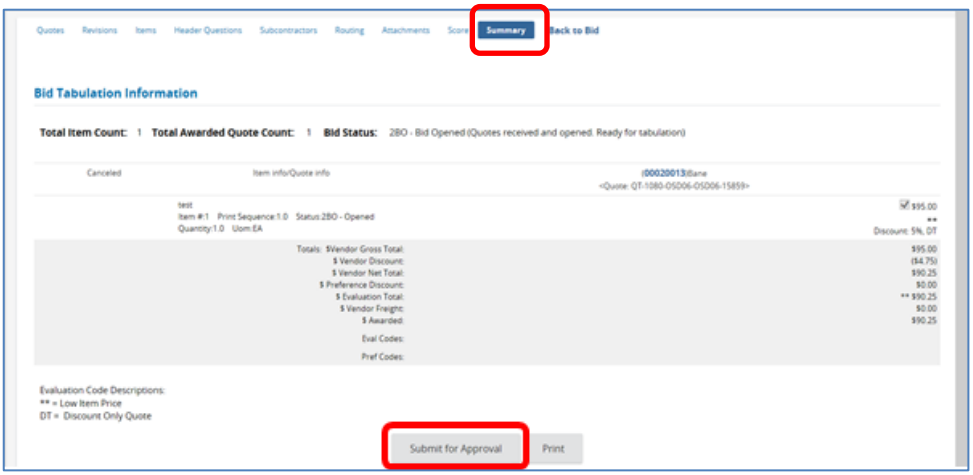
1. Click the **Items** tab to view and make the award.

2. To award all lines of the bid to a single vendor, click on the **Award All** button in the correct Vendor's column.
   To award a multi-line bid to different vendors, click on the **checkbox** on each line under the vendor who will receive the award.

   NOTE: If you choose **Award All**, a popup message will appear asking if you are sure you want to proceed. If so, click on the **OK** button.

3. After the award decisions are complete, click on the **Save & Continue** button.

NOTE: For small procurements (those less than or equal to $250,000 annually) refer to the SBPP Policy.



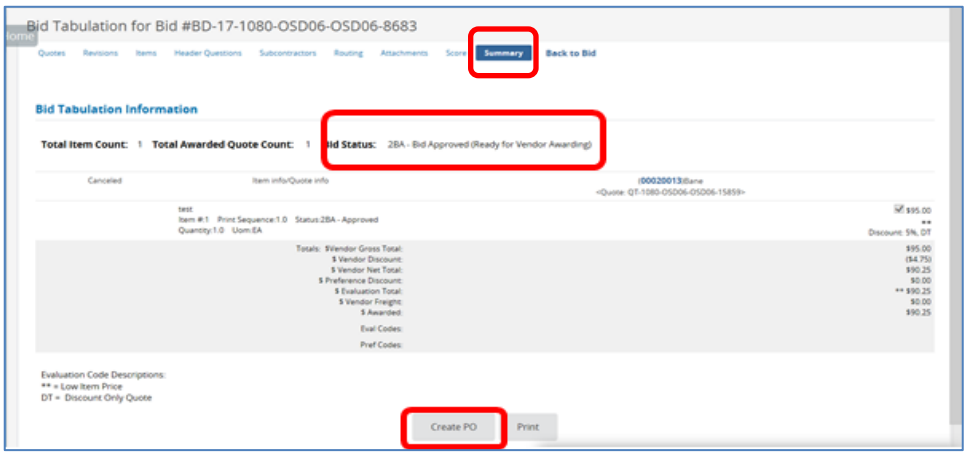
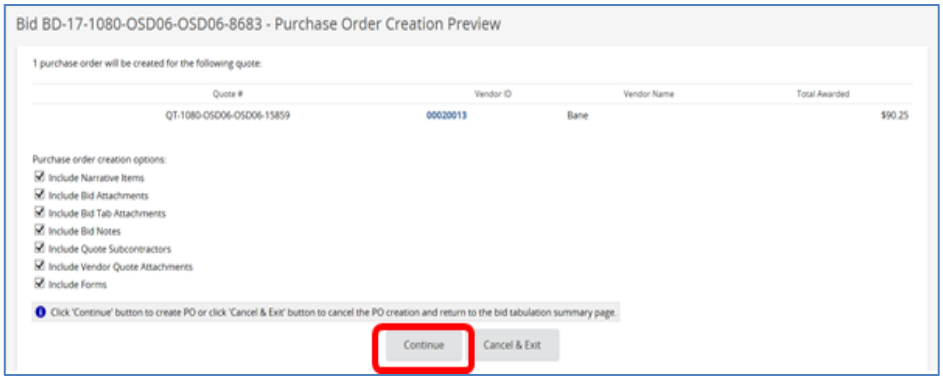
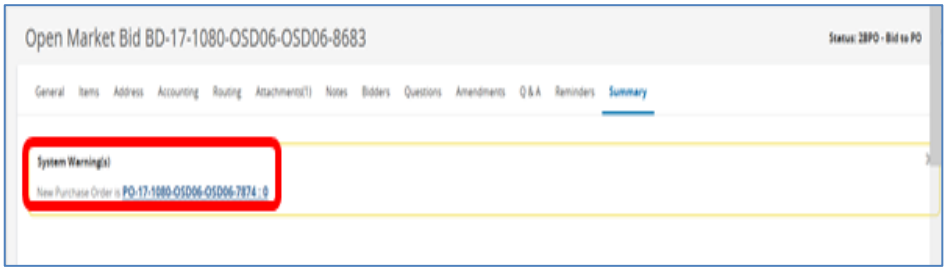
Step 15: Awarding the Bid

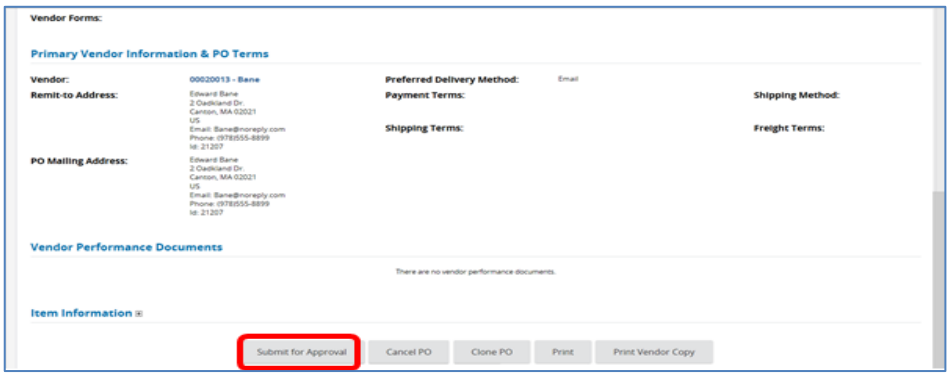
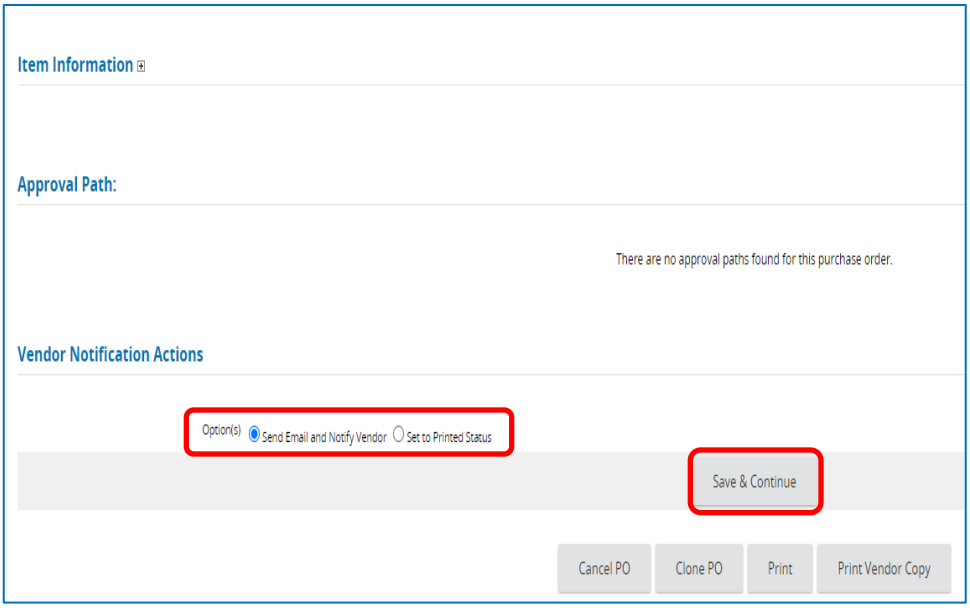
1. Click on the **Summary tab** to view the awarded vendor(s).

2. Click on the **Submit for Approval** button.

NOTE: If this is a Solicitation Enabled bid awarded to a vendor on an existing Statewide Contract, do not continue with the following steps.

If this bid is to be converted to a Master Blanket Purchase Order, **continue with the following steps**.

Screenshot	Directions
	**Step 16: Creating a PO** Once the evaluated bid has been approved, it will be in **2BA – Bid Approved** status. Go to the Summary tab page of the Bid Tabulation and click on the **Create PO** button at the bottom of the page.
	**Step 17: Generating an MBPO** The PO Creation Preview page displays. Any of the pre-checked boxes can be deselected; however that information will then need to be filled in manually. Best practice is to leave these as is. Click on the **Continue** button to generate a Master Blanket Purchase Order (MBPO) from all the information listed in the Bid and Bid Tabulation tabs screens.
	**Step 18: Opening the PO** The Bid Summary tab screen displays with the new PO number. To open and edit and/or submit the MBPO, click on the blue hyperlink **PO #**. **NOTE:** The PO is created and will be marked *In-Progress* if you wish to return to COMMBUYS at a later date.

Screenshot	Directions
	**Step 19: Submitting the MBPO for Approval** The PO will open to the **Summary** tab. It is In-Progress and therefore edits can be made if required. Click on the **Submit for Approval** button once you are ready to finalize the MBPO.
	**Step 20: Finalizing the MBPO** Once the MBPO has gone through the appropriate approval path it is in a **Ready to Send** status. 1. Locate the approved PO and open to the **Summary Tab**. At the bottom of the page, select from one of the two options: • **Send Email and Notify Vendor** (best practice). • **Set to Printed Status** (still posts the purchase order on COMMBUYS but does not send any vendor emails) 2. Click on the **Save and Continue** button to finalize the MBPO. The status changes to **Sent.** 3. If there are multiple vendors to be awarded, return to the Bid, and repeat Steps 18, 19, and 20.