**BID MANAGEMENT APP OVERVIEW**

The Kahua Bid Management app will support the bidding and RFP (Request for Proposal) process from creation to award, including creating bid solicitations (packages), inviting bidders, tracking bid responses (indication that the CIP will bid or will not bid), managing pre-bid Q&A, tracking proposals, and processing the awarded bidder’s proposal into a Contract. To reduce setup time on new projects Mayo has created “standard” bid solicitation templates in template projects. Users can also copy individual bid solicitations from previous projects into new projects or create new “non-standard” bid solicitation.

Bid invitations can be sent to existing Construction Industry Partners (CIPs) that have a Kahua domain or new CIPs that do not use Kahua can be invited without an existing domain license. Invited bidders receive an email requesting their bid response and can respond directly from email without logging into Kahua. To review the bid documents before responding, invited bidders will be required to either log into their existing Kahua account or to create a new basic Kahua account (no up-front license fees.) Bidders will use the free Bid Room app in their domain to review and respond to invitations.

Bid Management app, located under the Other section in the Apps menu, contains three sub-apps:

- Solicitations
- Proposals
- Q&A
PREPARING A BID SOLICITATION

This chapter has information for Mayo Clinic users only.

Mayo will use the Solicitations app to prepare packages, invite bidders, track responses and status of bids. There are three ways to prepare bid solicitations in your project. These are described in the following sections.

SOLICITATIONS INCLUDED IN PROJECT TEMPLATES

Standard bid solicitations for different trades and contracting methods are included in project templates. When you create a new project by copying a project template, these solicitations will be copied into your project. Edit existing solicitations, delete those that are not required or create new solicitations as necessary for your project scope and conditions.

COPY INDIVIDUAL SOLICITATIONS FROM ANY PROJECT OR TEMPLATE

To copy a solicitation from one project or project template to another, follow these steps:

1. Click on the Project Navigator to navigate to the source project
2. Click Apps and under the Other app group, click Bid Management, the Solicitations sub-app is open by default.
3. Select a solicitation in the list view, then select the COPY TO list action.
4. In the Select your testing project as the target of the copy to process:
5. In the Copy To dialog project list, expand the folder list and select the destination for the copied solicitation

![Copy To dialog](image)

6. In the checkboxes on the right, confirm the selection of items to copy into the new solicitation on your project:
   - Details
   - Bid Team
   - Bid Form
   - Documents
   - Drawings
   - Bidders

7. Click **Copy** to execute the process and close the wizard.

8. The **New Bid Solicitation** form opens in your destination project with all selected data items populated.

**CREATE A NEW SOLICITATION DIRECTLY IN YOUR PROJECT**

1. Click on the Project Navigator and navigate to your project
2. Click **Apps** and under the Other app group, click **Bid Management**, the **Solicitations** sub-app is open by default.
3. Click **New** to create a new blank solicitation.
4. Complete the information on the **Details** tab
   - Select a package from the **Description** lookup list
• Select a **Type**, Design, Construction, or CM at Risk / Design Build (**Note**: it is important that you select a solicitation Type before inserting any items in the Bid Sheet. Bid Item Types are dependent on the selected Type. The Item Type selector will not appear in the Bid Sheet until a Type is selected.)

![Bid Solicitations](image)

5. Fill out the dates in the **Schedule** section. Once a bid invitation has been sent, the dates will enable or disable bid features:

- **Bid Due** is required in order to **Send Invitation**

![Schedule](image)

- Bid Response (the CIP’s indication that they will or will not bid) feature is disabled for bidders once the **Response Due** date and time has expired, and they will not be able to send in a response.
• Submit Proposal feature is disabled for bidders once the Bid Due date and time has expired.

• Bidders will not be able to submit questions through Q & A once the Questions Due date and time has expired

6. Click the Bid Team tab and enter a Bid Manager. (This is the person who will administer the bidding process.)

• Some bid team members will populate from Project Workflow Roles on the Project Properties.

7. Bid Form

• Bid Manager is required. Bid Manager will receive notifications when various actions are performed by bidders, such as submitting a bid response or proposal.
• If you copied your Bid Solicitations from a template, the Bid Sheet will be populated, edit as appropriate for your project.

• Each item in the Bid Sheet must have an **Item Number, Description, Item Type** and **Account Category**. These should be pre-populated in the standard solicitation.

• If **Required** is checked on a bid item, bidders will not be able to submit a proposal if there is no bid value for the item.

• If additional bid items are required, click **Insert** to add additional rows.

• If **Alternate** is checked on a bid item, Mayo may choose whether or not to include the alternates when awarding the bid.

• In the Additional Details grid, click **Insert** to add an item. These fields will be prepopulated for the standard solicitations and will require the CIP to provide the basic information that is required for the bid form and subsequent contract if awarded. The selected **Input Type** on each additional input item determines the data type of the input field the bidder will see.

8. Documents & Drawings

• Include bid documents and drawings as appropriate for your project. To add documents in the **DOCUMENTS** section, click **UPLOAD** to add files from your computer, or click **ADD KAHUA DOC** to add files from File Manager.
• To import drawings from File Manager into the DRAWINGS grid, click **Import from File Manager**. In the import from File Manager dialog, select the location of your bid drawings in the folder list on the left, then check the box next to file you would like to include in your solicitation on the right.

• Click **Select** at the bottom to complete adding the drawings to your solicitation.

• You may also add drawings from your computer. Click **Insert** in the DRAWINGS grid to insert a new blank row for each drawing, then click **SELECT FILE** on the right of a row to open the upload dialog. Locate the drawing file on your computer and click Open to add the uploaded file.
Fill out the Sheet, Title, Discipline and other relevant information for each drawing.

9. Bidders
   - All bidders must be contacts in the Mayo Contacts app.
   - Each bidding company must have a person contact with an email address.
   - To search the Mayo Contacts app and add multiple bidders at once, click Search Companies to open the company select dialog. Check the box to select bid companies to include, then click Select at the bottom to add selected companies to the bidders grid.

   - For each selected bidding company, select a contact from the company to receive the bid invitation email.
Note: The contact is only required to receive the email. Once the company has been invited, any contact with access to the bid room in the bidder’s domain will be able to manage and submit the bid.

10. Click **Send Invitation** to send the invitation to the Bidders listed.
MANAGING THE BID PROCESS

This chapter has information for Mayo Clinic users only.

Once bidders have been invited, the Bid Team will track will bid/will not bid responses, monitor and manage questions from bidders.

TRACKING BID RESPONSES

1. Start by selecting the solicitation record in the log view, then click the Bidders tab

   ![Bidders tab screenshot]

2. The bidders list is not editable while the solicitation is in a Sent status. The status of each response is listed in the grid.

   ![Bidders list screenshot]

3. The status of each bid response may be:
   - **Invitation Sent** – Bid Invitation has been sent, bidder has not responded to the invitation with a “Will Bid” or “Will Not Bid” response. **Response Received** column is blank.
• **Will Not Bid** – Bidder indicated “Will Not Bid”. **Response Received** column has date response was received by Kahua.

• **Will Bid** – Bidder indicated “Will Bid”, proposal has not been received. **Response Received** column has date response was received by Kahua.

• **Proposal Submitted** – Bidder submitted a proposal. **Response Received** column has date proposal was submitted. *(Note: Proposal details, submitted on dates and other information are viewed in the Proposals sub-app.)*

• **Update Submitted** – Bidder updated a proposal. **Response Received** column has date proposal update was submitted. *(Note: Bidder may update their proposal until the Bid Due date has expired.)*

**EDITING THE SOLICITATION DURING THE BID PERIOD**

A solicitation may be edited during the bidding period. If the solicitation is updated, the Bid Manager has the option of forcing bidders to resubmit their proposal based on the nature of the changes. Changes such as adding bidders, changing due dates and other minor changes may not require bidders to submit new proposals. Other changes such as additional new bid items may require bidders to change their proposals. To make updates to the Bid during the bidding period, follow these steps:

4. Start by selecting the solicitation record in the log view.
5. Click **Edit** to enter edit mode.

![Bid Solicitation](image)

6. When required changes are complete, click **Send Update**.
7. Enter a **Reason For Sending Update** in the dialog box. The text of this message will be included in an email notification to all bidders that the solicitation has been updated.
8. If the checkbox **This update requires bidders to review and resubmit their bid** is checked, all previously submitted proposals in the Proposals sub-app are deleted.

![Reason For Sending Update](image)

**WITHDRAWING AN INVITATION DURING THE BID PERIOD**

A solicitation may be withdrawn by the Bid Manager at any time. To withdraw a bid invitation, follow these steps:

1. Select the solicitation record in the log view.
2. Click **Withdraw Invitation**

![Withdraw Invitation](image)

3. Read the notice carefully. This notice describes the resulting actions upon executing the withdraw invitation. Enter a **Reason for Withdraw**. This reason will be sent to all bidders in a notification.
Click **Continue** to confirm and execute the withdraw action.

4. Solicitation status changes to **Canceled**.
COMPARING PROPOSALS AND AWARDING A BID

Once all bidders have responded and the bid period is closed, the Bid Manager will review and compare proposals, request updates and award the bid. In the bid comparison process, the Bid Manager may enter leveling numbers. These functions are performed in the Proposals sub-app, which lists all proposals received across all solicitations on your project.

COMPARING BIDS

5. Click on the Proposals sub-app.

6. Select two or more proposals from the same package, then click COMPARE. Note: The Compare list action will only display after at least one list item is selected, and will only open the compare wizard when 2 or more list items are selected.

7. Selected proposals open in the Compare Bids wizard. In this wizard, the Bid Manager can review the following:
• Compare the bid items side by side

8. Enter any leveling amounts and notes on each proposal, then click **Save** when complete

9. To request updates from a bidder, select the proposal in the **Proposals** sub-app and open the **Adjustments & Leveling** tab. The original Bid amount and the Leveled bid amounts as well as any notes will appear in the grid. Click Send for Update to request an updated proposal from the bidder.
10. The status of the proposal will change to **Update Requested**

11. The bidder receives a notification requesting a updated proposal. None of the Bid Manager’s leveled amounts or notes will be provided to the bidder.
12. The bidder may edit their bid up until the Bid Due Date

13. The status of the proposal changes to Update Submitted when the bidder submits an update

14. If the Bid Due Date has expired or Awarded, the proposal may be reopened. Select a proposal and click Reopen, then enter the Revised Bid Due date
AWARDING A BID

1. In the Proposals sub-app, select the proposal to award and click Award Bid.

2. The status of the awarded bid changes to Awarded, and the awarded bidder receives a notification of the award.

3. The status all other bidders on the same solicitation change to Not Awarded, and bidders all receive a notification that their bid was not awarded.

4. After the bid has been awarded, any proposal may be reopened. After being reopened, the Bid Manager may enter a Revised Bid Due date, request a proposal update, or re-award the bid.
5. Note, if a bid is reopened and awarded, the status of other bids, including a bid in Awarded status, will be marked Not Awarded. Only one bid per solicitation may be in an awarded status.

PROCESSING A BID INTO A CONTRACT

1. In the Proposals sub-app, select the awarded bid for a solicitation and click Process.

2. In the Process wizard, select Contracts as the Target Application
3. Use the **Select copies to include** checkboxes to choose to include Portable Views on both the proposal and the contract created from it.

4. The **Select references to include** section will show any reference files attached to the proposal. If checked, these reference files will be copied and included as reference files on the resulting contract.

5. Click **Start Processing** to initiate the creation of the contract document

6. The wizard will open a new contract document and populate the new contract with data from the bid proposal, including the Contracted Party company and contact, bid items and other data relevant to the type of contract.

7. See the Contracts QRG for information on completing the contract.