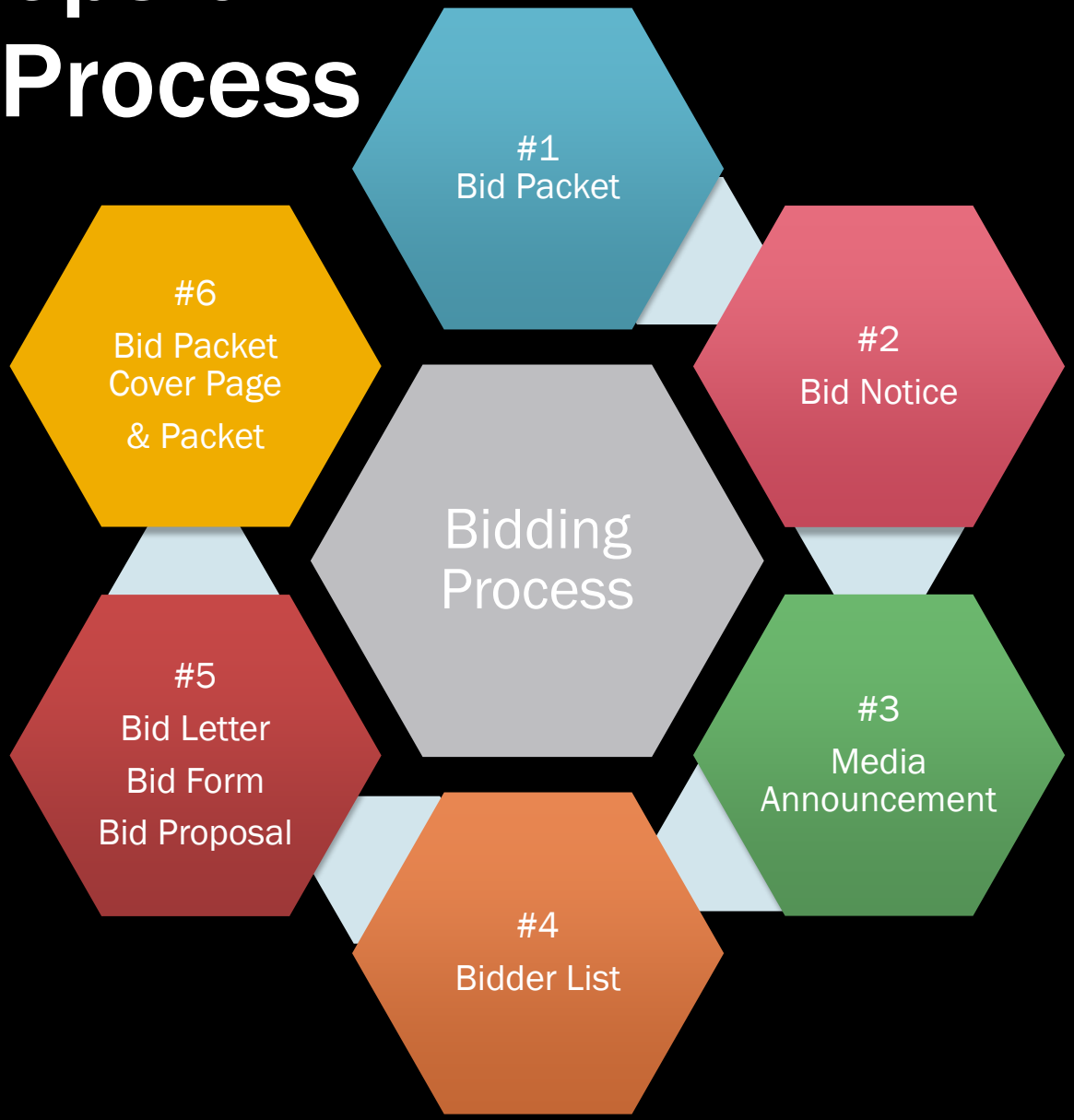
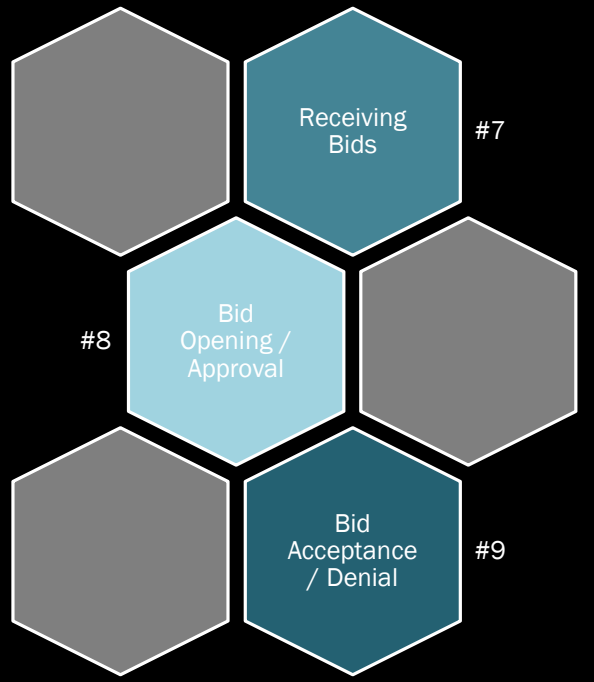
Initial Steps of Bidding Process

Last updated 5.27.26



Bid documents can be found in the DLT Google Folder



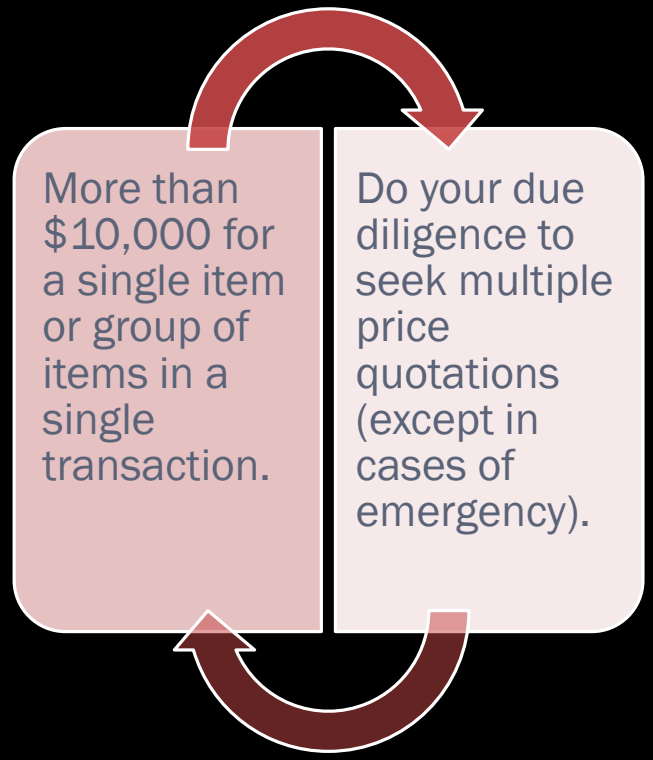
WHEN DO I FOLLOW THE SDH BIDDING PROCESS VS OBTAINING COMPETITIVE QUOTES?

SDH BIDDING PROCESS PER BOARD POLICY 6320 - PURCHASING



Please review Policy 6320 in full before moving forward.

SEEK COMPETITIVE QUOTES



Step #1 – Prepare Initial Bid Packet

- Complete **Form 1 – Bid Packet Cover Page** (Bid Initiator)
  - This document states: contact information, bidding contract information, bid deadline/bid opening dates/time, criteria for the bidder, and statements.
    - Determine the advertising dates and dates for bid opening/deadline according to the School Board meeting schedule. The bid deadline/opening date will need to be no less than 10 days before the date the School Board will act upon the bid.
- Complete **Form 2 – Bid Notice** (Bid Initiator)
  - This document states: location where bids are accepted, bid deadline/bid opening dates/time, contact information, and statements.
- Complete **Form 7 – Bid Proposal** (Bid Initiator – only if proposing with a financing contract)
  - This document states: terms and conditions of the bidding contract

Step #2 – Complete Bid Notice

- Forward **Form 2 – Bid Notice** (completed in first step) to designated school offices for posting:
  1. District Administrator's Office (Executive Assistant - Stacy Lockington)
  2. Business Services Office (Executive Assistant – Wendy McCoy)
  3. District Office (District Registrar – Courtney Wilson)
  4. High School Office (Administrative Assistant – Elizabeth Suhr)
     - This helps employees to be aware of upcoming/arriving bids for question/answer purposes and also to avoid pre-deadline opening of bid packets.

- Send completed **Form 2 – Bid Notice** via email to Executive Assistant, Wendy McCoy, to get posted on the District's webpage under: Business Services/Purchasing & Payments/Bids.

Step #3 – Prepare a Media Announcement

- Prepare **Form 3 – Media Announcement** (Your Admin Assistant)
  - Dates to run the ad
  - Request for affidavit of the publication
  - Purchase Order (if necessary, contact the Director of Business Services, Krystal Matt, for account numbers to prepare the PO)
  - Text from **Form 2 - Bid Notice** document in Column (Stacy Lockington can assist)
    - Allow approximately 2 weeks or a minimum of 5 days after the legal notice for bidder response.
- Once prepared, **Form 3 - Media Announcement** is sent via email, requesting the notice be advertised in the Legal Notice section of the La Crosse Tribune.
  - *The La Crosse Tribune is our official paper for the 2025-2026 term.*
  - *Legal Notices run every day of the week in the La Crosse Tribune, but the highest circulation days are Wednesdays and Saturdays. Should you need to send via the Holmen Courier, Legal Notices run on Fridays only.*

Step #4 – Prepare Bidder List

- Prepare **Form 4 – Bidder List** (Bid Initiator)
  - This document states:
    - Vendor name, address, phone, and email
    - Items sent to each bidder (letter, bid packet, and school board policy)
    - Date sent to bidder
    - Method used to send to the bidders and who sent it (typically email)
- The District Office Registrar, Courtney Wilson, receives a copy to keep a record of who received the Bid Packet.

Step #5 – Prepare Bid Letter, Form & Proposal

- Prepare Form 5 – Bid Letter (Bid Initiator)
  - States: all detail from Form 2 - Bid Notice and states the rights of the Board.
- Prepare Form 6 – Bid Form (Bid Initiator – only if proposing financing contract)
  - States: what the requirements are for the bidder, the statement that the right is reserved to reject any and all bids, to waive technicalities, and a statement that, when appropriate, bid specifications shall include penalty clauses.
- Prepare Form 7 – Bid Proposal (Bid Initiator – only if proposing financing contract)
  - States: terms and conditions

- Send the completed Form 5, Form 6 & Form 7 to each vendor according to Form 4 – Bidder List

Step #6 – Forward Bid Packet

- Forward one copy of the **Bid Packet** to the Bid Initiator.

- Forward three copies of the **Bid Packet** to the District Office Registrar, Courtney Wilson, containing:
  - Form 1 – Bid Packet Cover Page
  - Form 4 – Bidder List
  - Form 2 – Bid Notice
  - Form 6 – Bid Form (only if proposing financing contract)
  - Form 7 – Bid Proposal (only if proposing financing contract)
- Courtney will keep a record of **Bid Packets** distributed.

Step #7 – Received Bids

- Upon receiving, date, time stamp and sign your name.
  - If bidder delivers an unsealed bid when sealed bids are requested:
    - Provide them an envelope to create a sealed bid delivery.
    - Ensure the bidder's name is documented on the provided envelope. Record in the lower left of the envelope "Received as unsealed bid." Sign your name, date and time received. Treat as any other sealed bid.
- The designated receiver of bids holds the incoming bids in a designated common area until the bid opening date.
  - Sometimes, the competitive bid process yields only one bidder. When this occurs, the Bid Initiator refers to **Form 13 – Single Bid Received.**
    - It's always better to have more than one bidder, so efforts should be made well in advance of the bid to advertise and solicit bids to create competition.
- Received bids will be provided to the Bid Initiator, in person, so that it is a hand-to-hand exchange.

Step #8 – Bid Opening / Approval

- The bid opening is to be held at a designated date and time.
  - The designated Receiver of Bids does a bid analysis on **Form 8 – Bid Summary.**
    - **This** is prepared when final analysis/comparison between bidders is performed. The detail of each bid is filled in on the form as the bids are opened in the presence of the contact person and witnesses.
  - The Bid Initiator will need to refer to **Form 9 – Bid Bonds and Bid Securities** document to determine what is acceptable for bonds and securities.
    - Used when opening the bids to determine what is acceptable for bonds and securities.
  - The Bid Initiator sends the completed **Form 10 – Bid Issue Paper** and **Form 8 – Bid Summary** documents to the District Administrator's Executive Assistant, Stacy Lockington, to get the topic on the School Board agenda.
    - Information includes: date, bid item, date of bid decision and bid amount.
  - The Bid Initiator presents final analysis to the School Board for approval.

Step #9 – Bid Acceptance / Denial

- The Bid Initiator forwards the appropriate form to all bidders:
  - Form 11 – Yes/Acceptance Letter to the one awarded the bid
    - Information includes: bid item, date of bid decision, and bid amount.
  - Form 12 – No/Denial Letter to each bidder not accepted:
    - Information includes: bid item, date of bid decision, bid amount, and who the bid was awarded to.