

MAYO CLINIC



Bid Management Quick Reference Guide

October 2019



Prepared for the Mayo Clinic
Enterprise Kahua Deployment

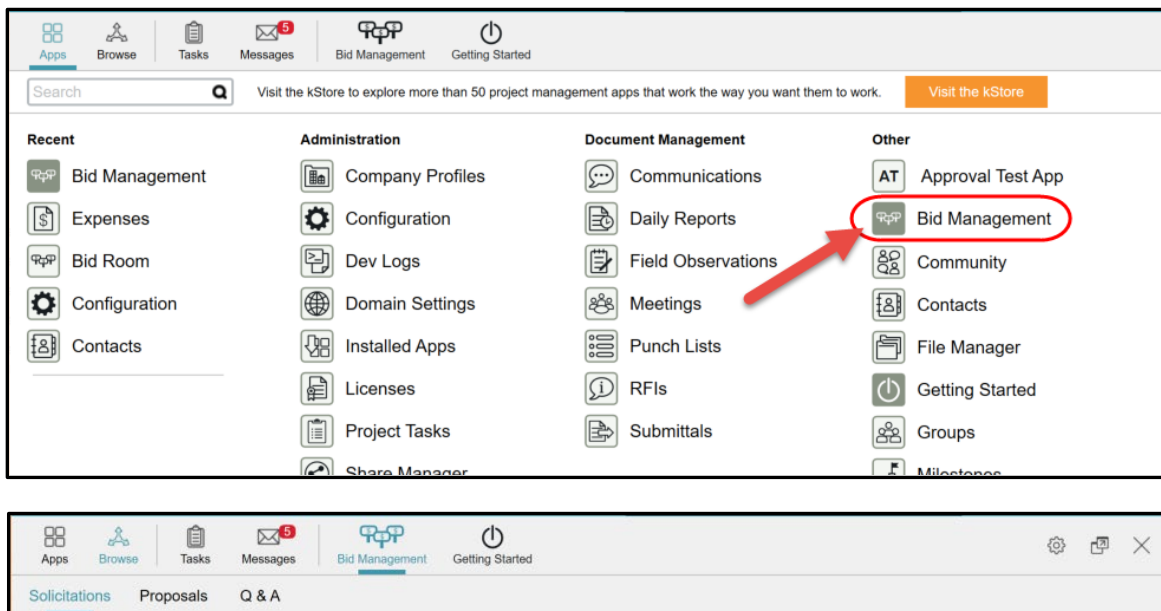
BID MANAGEMENT APP OVERVIEW

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.

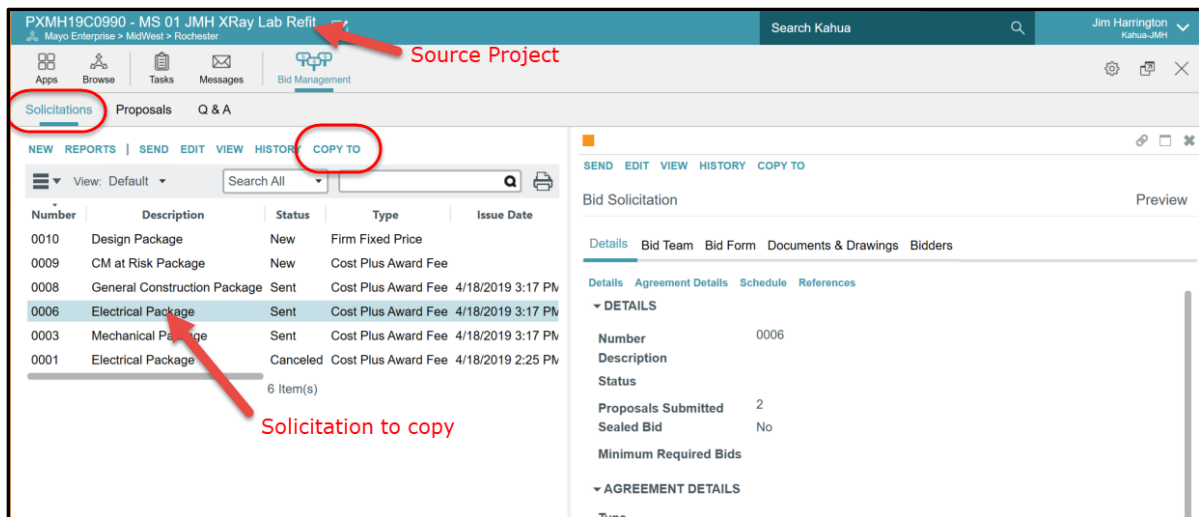
SOLICITATIONS INCLUDED IN PROJECT TEMPLATES

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

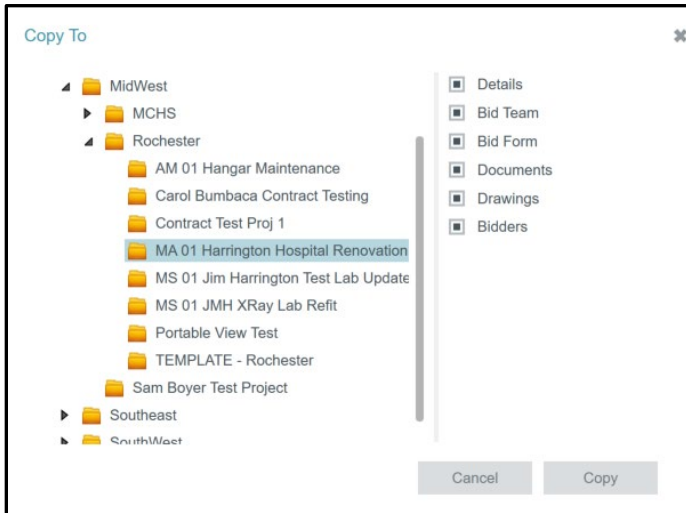
To copy a solicitation from one project or project template to another, follow these steps:

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



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.)

The screenshot shows the 'Bid Solicitations' form with the following details:

- DETAILS**
 - Number: 0001
 - Description: Single Prime General Contractor
 - Status:
 - Proposals Submitted: 0
 - Sealed Bid:
 - Minimum Required Bids: [Empty field]
- AGREEMENT DETAILS**
 - Type: Construction
 - Agreement Type: Standalone Agreement
 - Delivery Method: Stipulated Sum
 - Work Retainage Rate: 10
 - Scope: [Empty field]

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**

The screenshot shows the 'SCHEDULE' section with the following dates and times:

- Issue Date: [Select a date]
- Response Due: [Select a date] 15 [Enter time]
- Pre-Bid Meeting: [Select a date] 15 [Enter time]
- Vendor Interviews: [Select a date] 15
- Questions Due: [Select a date] 15 [Enter time]
- Bid Due: 9/27/2019 15
- Anticipated Award Date: [Select a date] 15
- Construction Start Date: [Select a date] 15
- Substantial Completion Date: [Select a date] 15
- Construction Completion Date: [Select a date] 15

- 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.

The screenshot shows the 'New Bid Solicitation' form with the 'Bid Team' tab selected. The form contains the following fields and their values:

Field	Value
Bid Manager	Mayo Grp Test PM Role - Mayo Enterprise X
Mayo Project Manager	Mayo Grp Test PM Role - Mayo Enterprise X
Mayo Construction Manager	Mayo Grp Test CM Role - Mayo Enterprise X
Architect Contact	Archie ProjArchitect - DECO Architects X
Engineer Contact	
Q & A Manager	Jim Harrington - Kahua-JMH X

- **Bid Manager** is required. Bid Manager will receive notifications when various actions are performed by bidders, such as submitting a bid response or proposal.
7. Bid Form

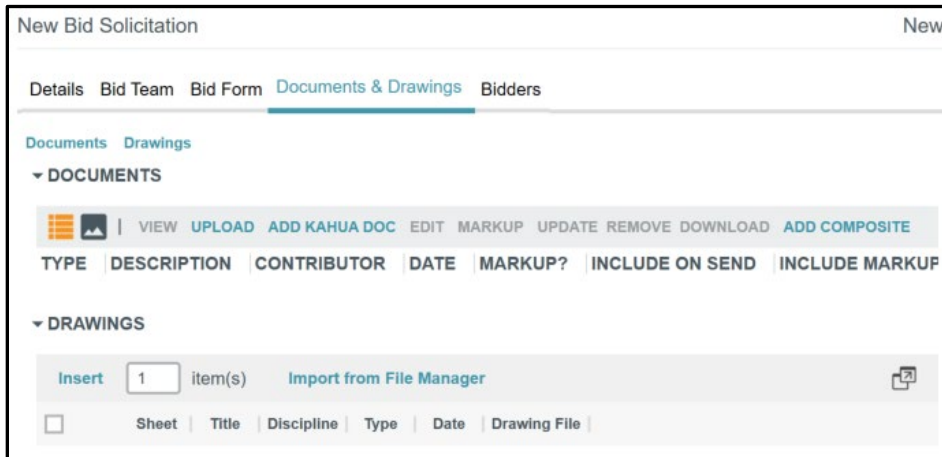
- If you copied your Bid Solicitations from a template, the Bid Sheet will be populated, edit as appropriate for your project.

Replace with graphic for a standard solicitation with Items and Additional Input Items

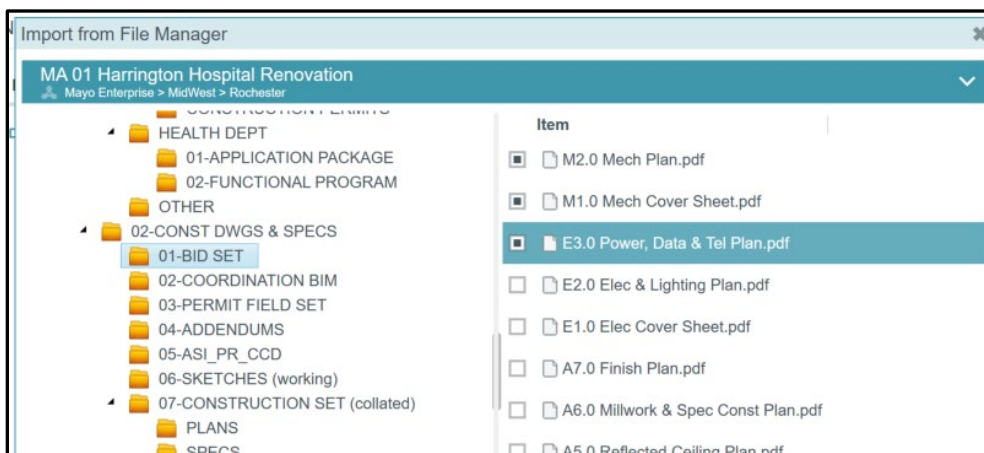
- Each item in the Bid Sheet must have an **Item Number**, **Description**, **Item Type** and **Account Category**. These should be pre-populated in the standard solicitation.
- If **Required** is checked on a bid item, bidders will not be able to submit a proposal if there is no bid value for the item.
- 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.

The screenshot shows a software interface titled "DRAWINGS". At the top, there is a button labeled "Insert" with a dropdown menu showing "1" and the text "item(s)", and a link "Import from File Manager". Below this is a table with the following columns: Sheet, Title, Discipline, Type, Date, and Drawing File. The table contains four rows of data. The first row has "M2.0 Mech Plan.pdf" in the Title column. The second row has "M1.0 Mech Cover Sheet.pdf". The third row has "E3.0 Power, Data & Tel Plan.pdf". The fourth row is empty. Each row has a "SELECT FILE" button in the Drawing File column. Red arrows point to the "Insert" button and the "SELECT FILE" button in the third row.

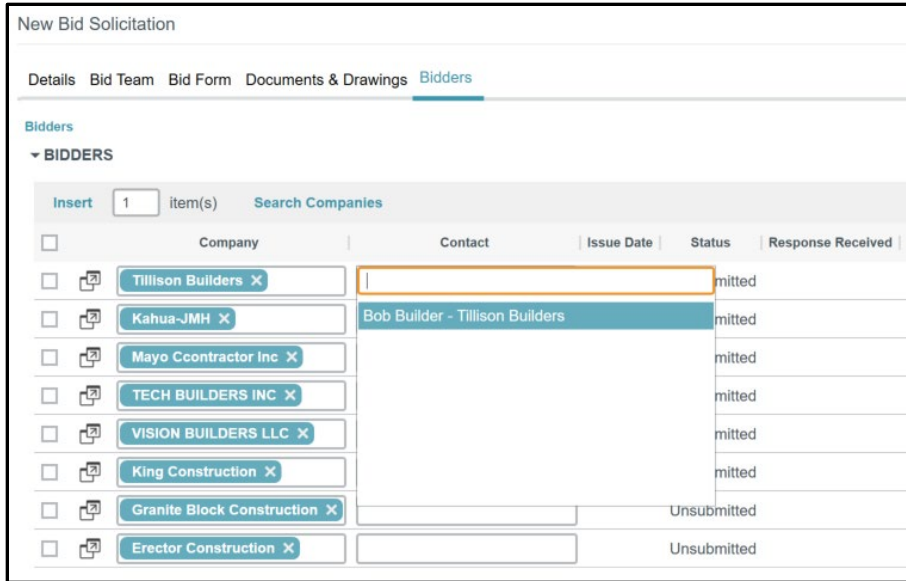
Sheet	Title	Discipline	Type	Date	Drawing File
	M2.0 Mech Plan.pdf			Select a date 15 Enter time	M2.0 Mech Plan.pdf SELECT FILE
	M1.0 Mech Cover Sheet.pdf			Select a date 15 Enter time	M1.0 Mech Cover Sheet.pdf SELECT FILE
	E3.0 Power, Data & Tel Plan.pdf			Select a date 15 Enter time	E3.0 Power, Data & Tel Plan.pdf SELECT FILE
				Select a date 15 Enter time	SELECT FILE

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.

The screenshot shows a "Search Companies" dialog box. It has a search bar at the top with a dropdown menu set to "Search All" and a search icon. Below the search bar is a list of companies with checkboxes for selection. The list includes: ABATEMENT TECHNOLOGIES INC, ABBOTT LABORATORIES INC, ABS INC, ACCELERATED LABORATORY, ACCESSIBILITY RESOURCE CENTER, ACCOLA GALLERY, ACCUTOME INC, ACME CRYOGENICS INC, ACOUSTICS BY DESIGN INC, ACTION PRODUCTS INC, ADAIR ELECTRIC COMPANY INC, ADAMICKS IRONWOOD CUSTOM, ADAMS REMCO INC, ADVANCED ASSEMBLY LLC, ADVANCED CIRCUITS, ADVANCED CONTRACT EQUIPMENT, ADVANCED MEDICAL EMERGENCY, and ADVANCED PROCESS SOLUTIONS IN. At the bottom of the dialog, there are "Select" and "Cancel" buttons. The text "1428 Item(s)" is visible at the bottom of the list.

- 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.

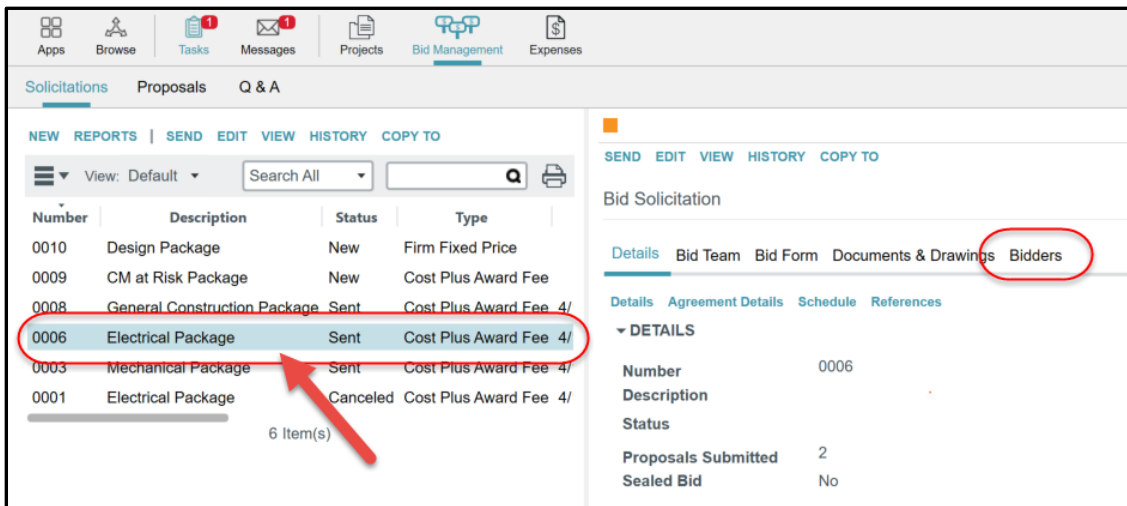
MANAGING THE BID PROCESS

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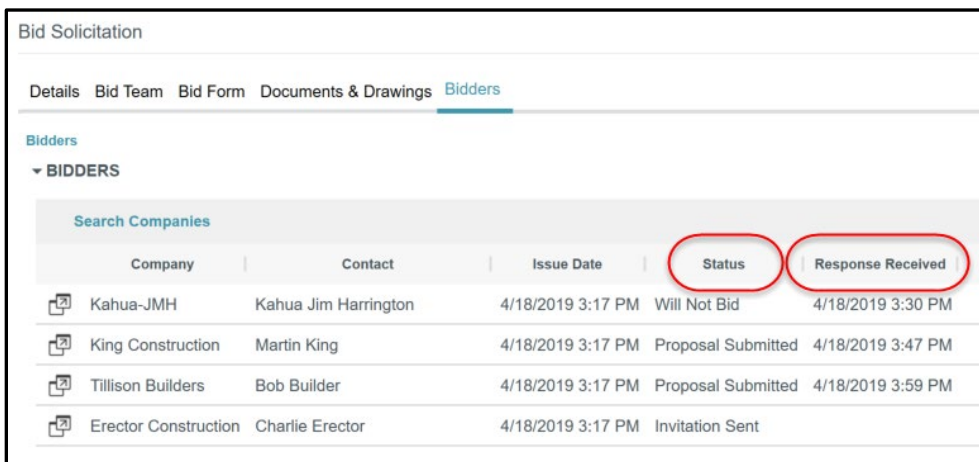
Once bidders have been invited, the Bid Team will track will bid/will not bid responses, monitor and manage questions from bidders.

TRACKING BID RESPONSES

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



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.



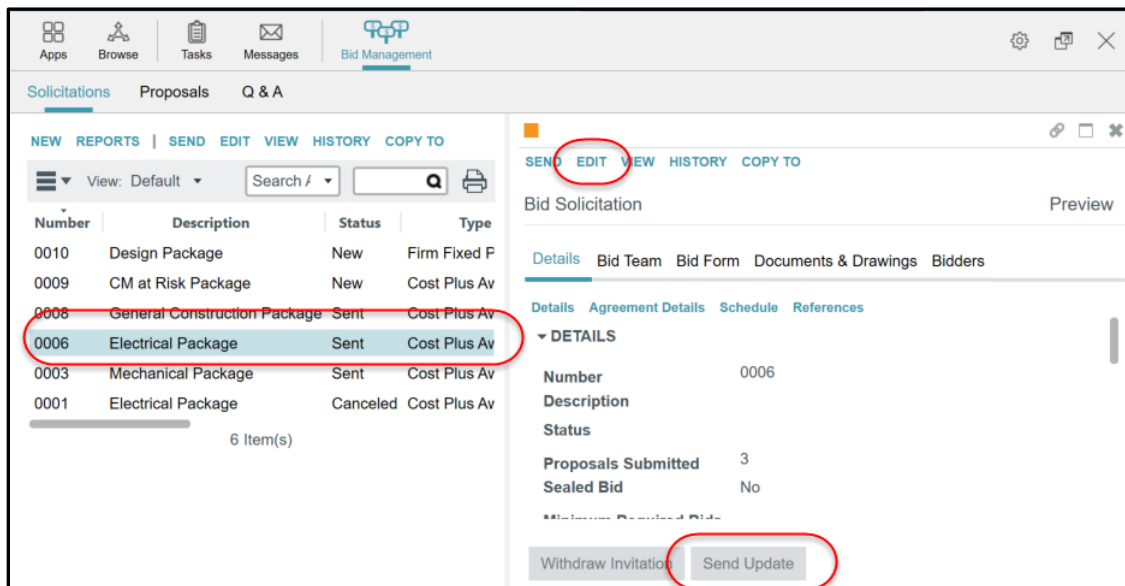
3. The status of each bid response may be:
 - **Invitation Sent** – Bid Invitation has been sent, bidder has not responded to the invitation with a “Will Bid” or “Will Not Bid” response. **Response Received** column is blank.

- **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

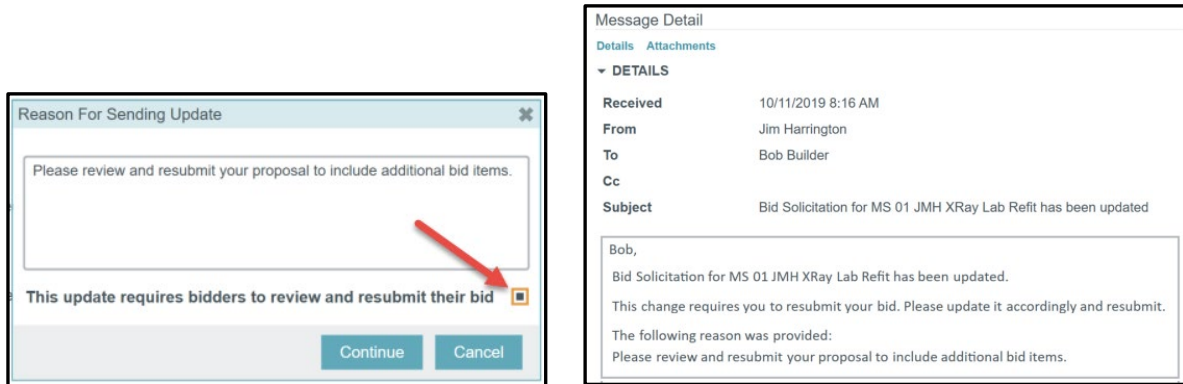
A solicitation may be edited during the bidding period. If the solicitation is updated, the Bid Manager has the option of forcing bidders to resubmit their proposal based on the nature of the changes. Changes such as adding bidders, changing due dates and other minor changes may not require bidders to 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.



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.

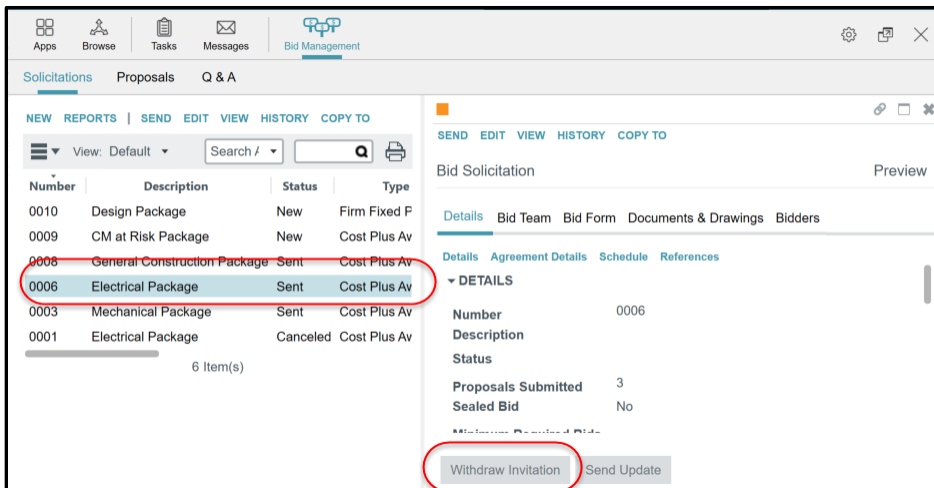
- If the checkbox **This update requires bidders to review and resubmit their bid** is checked, all previously submitted proposals in the Proposals sub-app are deleted.



WITHDRAWING AN INVITATION DURING THE BID PERIOD

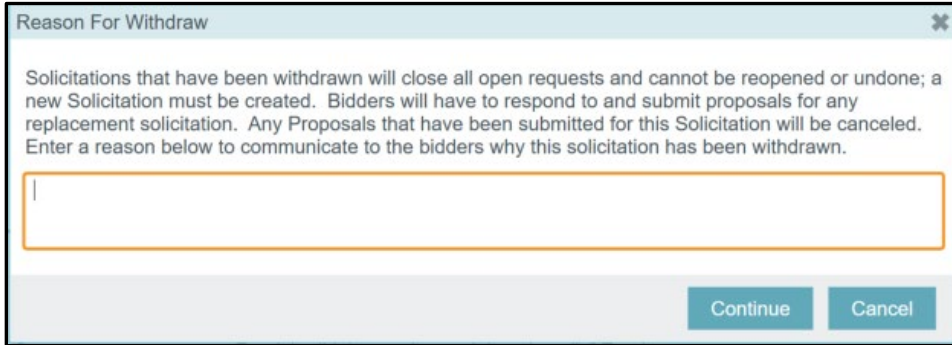
A solicitation may be withdrawn by the Bid Manager at any time. To withdraw a bid invitation, follow these steps:

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



- 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.



A dialog box titled "Reason For Withdraw" with a close button (X) in the top right corner. The text inside reads: "Solicitations that have been withdrawn will close all open requests and cannot be reopened or undone; a new Solicitation must be created. Bidders will have to respond to and submit proposals for any replacement solicitation. Any Proposals that have been submitted for this Solicitation will be canceled. Enter a reason below to communicate to the bidders why this solicitation has been withdrawn." Below the text is a large, empty text input field with a thin orange border. At the bottom right of the dialog box are two buttons: "Continue" and "Cancel".

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.

<input type="checkbox"/>	Proposal Number	Bid Solicitation	Status	Submitted By Company	Submitted By Contact	Submitted On
<input type="checkbox"/>	0011	0012 Multi Prime General Contractor	Reopened	Kahua-JMH	Jim Harrington	10/10/2019 2:07 PM
<input type="checkbox"/>	0006	0008 General Construction Package	New	Tillison Builders	Bob Builder	4/18/2019 4:02 PM
<input type="checkbox"/>	0005	0006 Electrical Package	Awarded	Tillison Builders	Bob Builder	4/18/2019 3:59 PM
<input checked="" type="checkbox"/>	0004	0003 Mechanical Package	New	Tillison Builders	Bob Builder	4/18/2019 3:57 PM
<input checked="" type="checkbox"/>	0003	0003 Mechanical Package	New	King Construction	Martin King	4/18/2019 3:52 PM
<input type="checkbox"/>	0002	0008 General Construction Package	New	King Construction	Martin King	4/18/2019 3:49 PM
<input type="checkbox"/>	0001	0006 Electrical Package	Not Awarded	King Construction	Martin King	4/18/2019 3:47 PM

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

The screenshot displays the 'Compare Bids' window. At the top, there is a navigation bar with 'Solicitations', 'Proposals', and 'Q & A'. Below this, a 'Compare Bids' section has a 'Highlight Variance of' dropdown set to '10%'. The main area is a table comparing a 'Budget' with two proposals: 'Tillison Builders' and 'King Construction'. The table has columns for 'Company', 'Bid', 'Leveled', and 'Notes'. The 'Budget' column shows a total of \$0. The 'Tillison Builders' proposal has a total bid of \$1,113,257 and a leveled amount of \$1,113,257. The 'King Construction' proposal has a total bid of \$658,456 and a leveled amount of \$658,456. The table lists various bid items with their respective bid and leveled amounts, and notes. An alternate bid is also shown at the bottom.

Company	Budget	Tillison Builders Bid	Tillison Builders Leveled	King Construction Bid	King Construction Leveled
Total	\$0	\$1,113,257	\$1,113,257	\$658,456	\$658,456
BID SHEET					
01 .C22 Mechanical Package		\$83,865	\$83,865	\$3,845	\$3,845
01A .C2201 Mechanical Labor		\$765,554	\$765,554	\$47,489	\$47,489
01B .C2201 Mechanical Subcontracted		\$0	\$0	\$77,777	\$77,777
01C .C2201 Mechanical OH&P		\$123,456	\$123,456	\$474,833	\$474,833
01D .C2201 Mechanical Materials		\$4,747	\$4,747	\$45,678	\$45,678
01E .C2201 Mechanical Tax		\$46,748	\$46,748	\$8,766	\$8,766
01F .C2201 Mechanical Other		\$88,887	\$88,887	\$68	\$68
Subtotal	\$0	\$1,113,257	\$1,113,257	\$658,456	\$658,456
ALTERNATES					
02 .C22 Alternate 1		\$46,847	\$46,847	\$37,777	\$37,777

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.

Proposals

REPORTS | SEND EDIT VIEW HISTORY

View: Default

COMPARE

Proposal Number	Bid Solicitation
<input type="checkbox"/>	0009 0015 Multi Prime Gener
<input type="checkbox"/>	0008 0015 Multi Prime Gener
<input type="checkbox"/>	0007 0015 Multi Prime Gener
<input type="checkbox"/>	0006 0008 General Construc
<input type="checkbox"/>	0005 0006 Electrical Packag
<input checked="" type="checkbox"/>	0004 0003 Mechanical Packa
<input checked="" type="checkbox"/>	0003 0003 Mechanical Packa
<input type="checkbox"/>	0002 0008 General Construc
<input type="checkbox"/>	0001 0006 Electrical Package

9 Item(s)

Proposals

SEND EDIT VIEW HISTORY

Proposals

Details Adjustments & Leveling

Bid Sheet Substitutions Additional Items

Bid Total \$1,648,992.00

Leveled Total \$1,657,127.00

BID SHEET

Item Number	Description	Activity Code	ALT	Include	Qty	UOM	Unit Price	Bid	Leveled	Notes
01	Mechanical Package	.C22	No					\$83,865.00	\$92,000.00	Doesn't include bl
01A	Mechanical Labor	.C2201	No					\$765,551.00	\$765,551.00	
01B	Mechanical Subcontracted	.C2201	No					\$0.00	\$0.00	
01C	Mechanical OH&P	.C2201	No					\$123,456.00	\$123,456.00	
01D	Mechanical Materials	.C2201	No					\$4,747.00	\$4,747.00	

Send for Update Send For Approval Mark Approved

10. The status of the proposal will change to **Update Requested**

Proposals

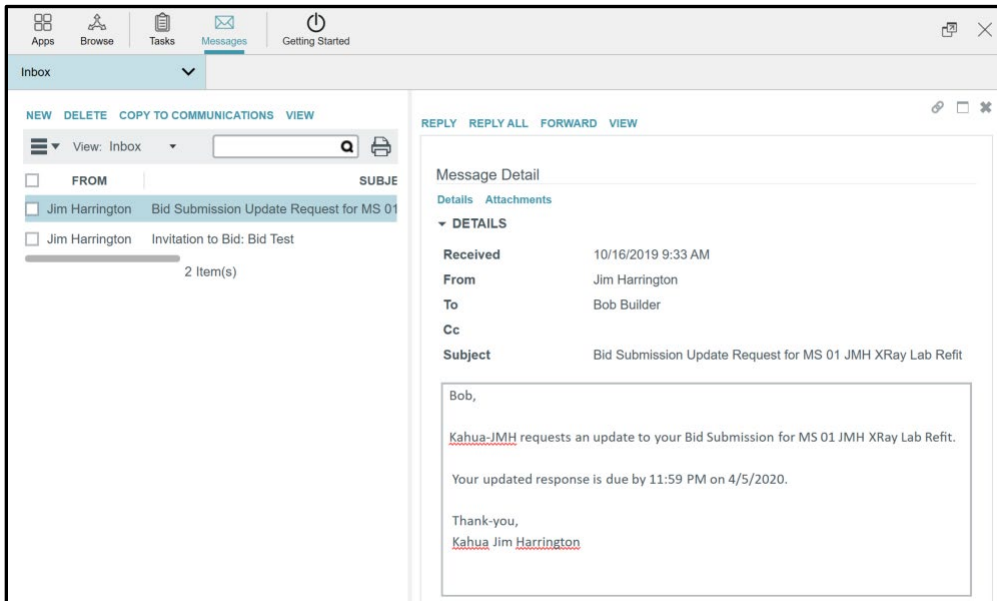
REPORTS

View: Default

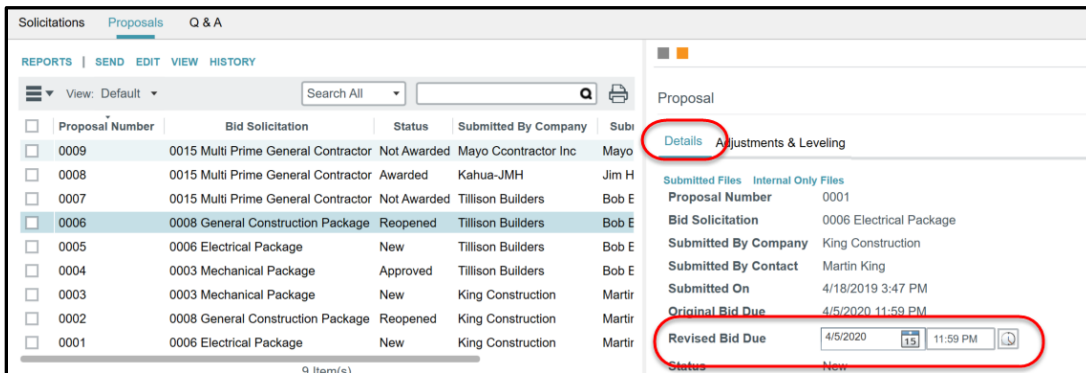
COMPARE

Proposal Number	Bid Solicitation	Status	Submitted By Company	Submitted By Contact
<input type="checkbox"/>	0005 0006 Electrical Package	New	Tillison Builders	Bob Builder
<input checked="" type="checkbox"/>	0004 0003 Mechanical Package	Update Requested	Tillison Builders	Bob Builder
<input checked="" type="checkbox"/>	0003 0003 Mechanical Package	New	King Construction	Martin King
<input type="checkbox"/>	0002 0008 General Construction Package	Not Awarded	King Construction	Martin King
<input type="checkbox"/>	0001 0006 Electrical Package	New	King Construction	Martin King

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.

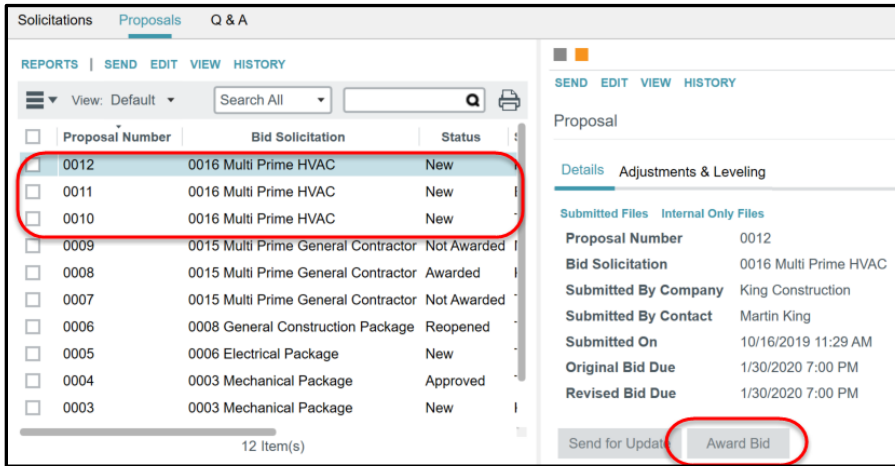


12. The bidder may edit their bid up until the Bid Due Date
13. The status of the proposal changes to **Update Submitted** when the bidder submits an update
14. If the Bid Due Date has expired or Awarded, the proposal may be reopened. Select a proposal and click **Reopen**, then enter the **Revised Bid Due** date

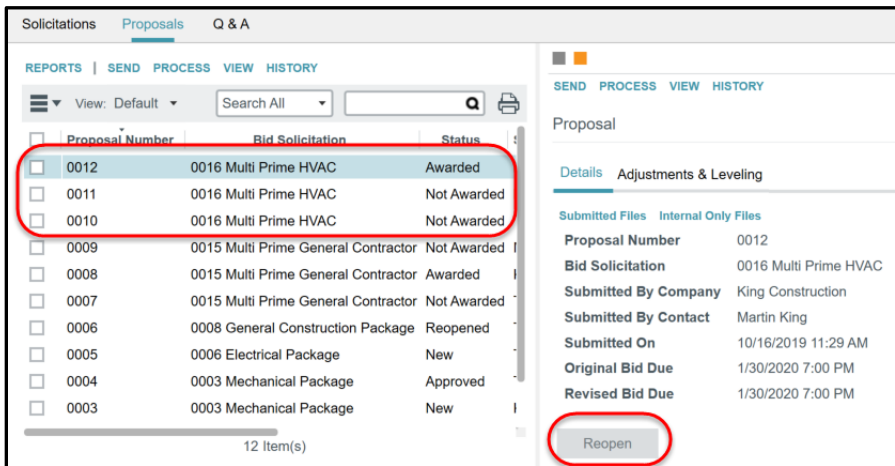


AWARDING A BID

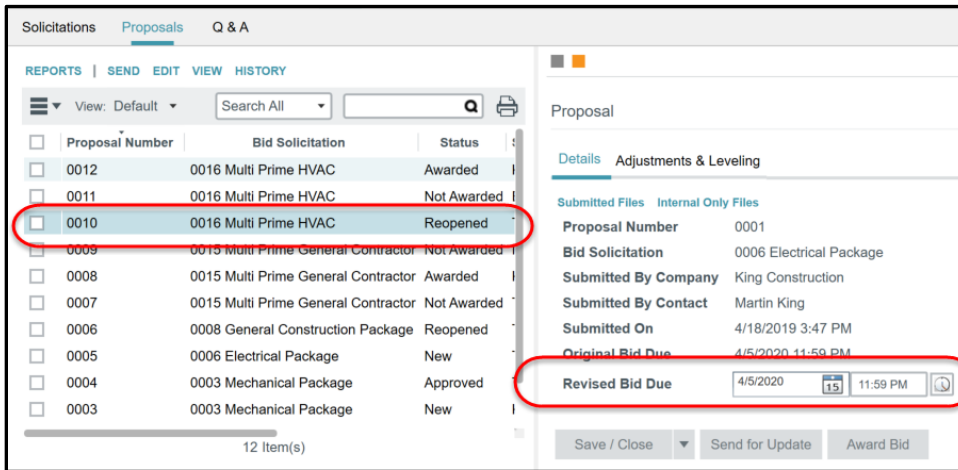
1. In the Proposals sub-app, select the proposal to award and click **Award Bid**.



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.



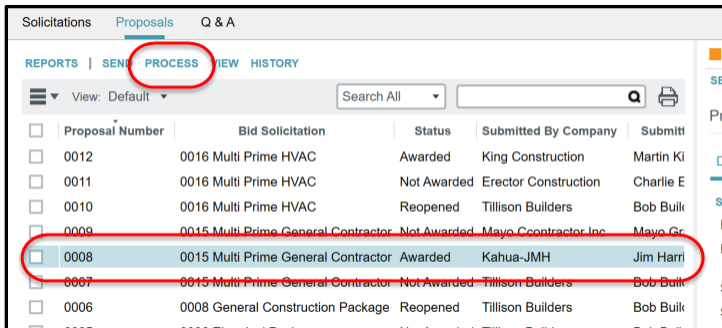
4. After the bid has been awarded, any proposal may be reopened. After being reopened, the Bid Manager may enter a **Revised Bid** Due date, request a proposal update, or re-award the bid.



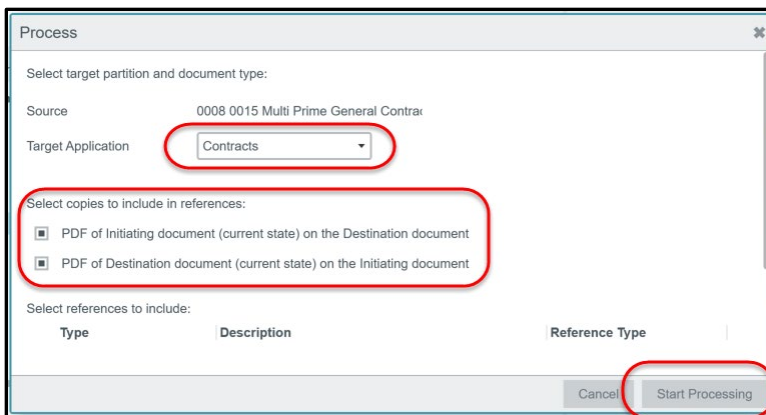
- Note, if a bid is reopened and awarded, the status of other bids, including a bid in Awarded status, will be marked Not Awarded. Only one bid per solicitation may be in an awarded status.

PROCESSING A BID INTO A CONTRACT

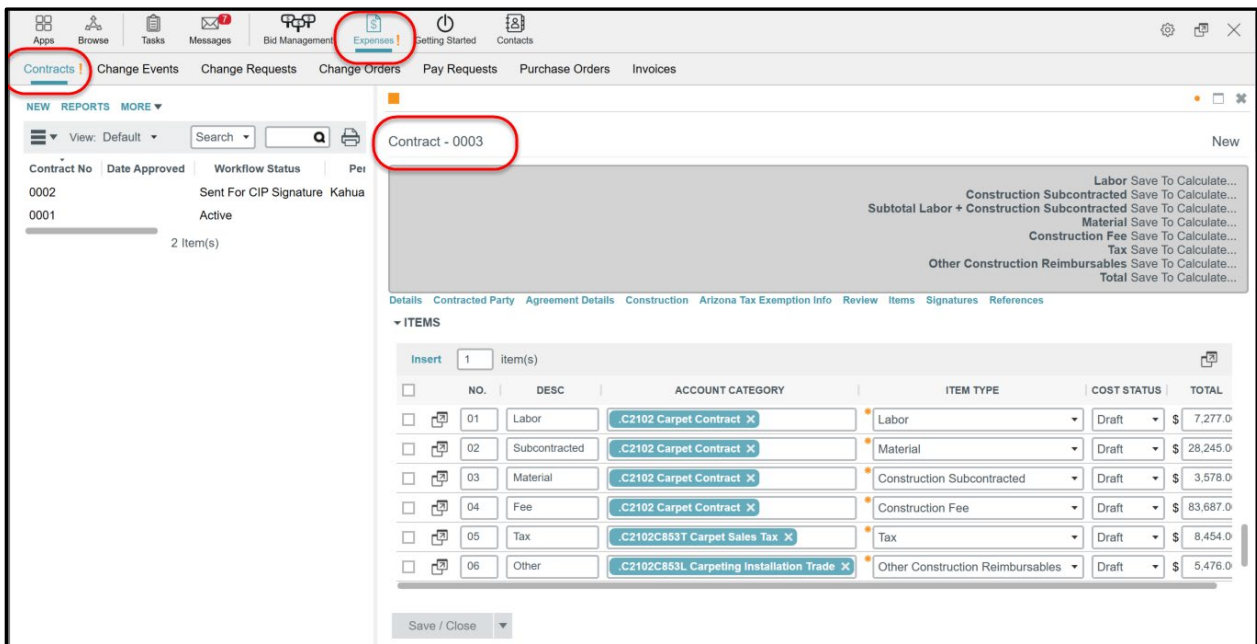
- In the **Proposals** sub-app, select the awarded bid for a solicitation and click **Process**.



- 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.