



# Timeline for Efficient Procurement

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*Note: The dates provided in this timeline are EXAMPLES ONLY.*

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## **Date Contract Must Be Implemented: July 1**

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## **Date Bids/Contracts Must be approved By Board Of Education: Early June**

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## **Open Bids: Mid-May**

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In most cases, bids will require at least 30 days to analyze and verify.

## **Mail Bids and Public Advertisement: April 1**

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This should be scheduled 5-6 weeks prior to the bid opening: distributors typically need this amount of time to “shop out” the products that will give operations the best prices.

## **Formal Pre-Bid Conference: Mid-March**

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This should be scheduled 2-3 weeks prior. Having a formal pre-bid prior to the bid being mailed will allow operations to make adjustments to both the boiler-plate bid language and the item specifications using information gained at the pre-bid. This will generate a better bid document. Make sure all bidders are aware of all pertinent information and reduce the need for bid addends.

## **Finalize for Distribution at Pre-Bid Conference Bid Boilerplate and Bid Worksheets (Which Should Include Specifications, Approved Brand/Manufacturer’s Code Information): Early March**

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This should be scheduled 1 week prior to the formal pre-bid conference.

## **Conduct Informal Meetings With Prospective Distributions: Mid-December to Mid-January**

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In these meetings, which should be scheduled two months prior, operators should review with distributor representatives the bid boiler-plate, terms and conditions, bid item specifications, approved brands and products listed in the distribution bid. This is a great opportunity to gain input from distributors on ways to streamline and improve the process in order to maximize cost reduction. Such conferences tend to yield more and better information, if they are conducted individually with each prospective distributor, as they may be reluctant to speak openly in the presence of competitors.

## **Conduct Prequalification Visits With New Distributors: Mid-December to Mid-January**

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These should be conducted two months prior. This step is a good opportunity to identify and verify companies that are qualified to handle the type of contract and the volume of purchases you will require. These visits may be conducted in conjunction with the informal meetings described above. Prequalification inspections also may be conducted throughout the year as operations receive inquiries from prospective distributors.

## **Meet with Brokers and Manufacturers’ Reps Routinely to Analyze New Products and Brands: Throughout the Year**

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Operators also should work with brokers, manufacturers and distributors to refine specifications. The entire bid document should be reviewed and analyzed routinely to eliminate low-use items, take high-use items direct-to-manufacturer and add new products as they become available and are determined to fit into menus.