



## Bids Involving Pre-Qualifying Vendors or Contractors

At times, there is a desire to establish a list of pre-qualified vendors or contractors for a particular project or scope of work. The objective is to permit only those pre-qualified companies to submit proposals or sealed bids. PennBid can effectively manage this process. Below is one option that works well.

**NOTE 1** – There are other options available, such as a “Dual Opening” (technical then pricing review). The PennBid office will be glad to discuss and assist in assuring success. Just give us a call.

**NOTE 2** – It is important to understand that the PennBid Program can be set as either a “**Public**” solicitation (available to everyone) or “**Private – By Invitation Only**” solicitation (only those invited will have access to the solicitation and the solicitation is NOT visible to the general public).

In the example below, the Pre-Qualification solicitation is due by 12/30/2015 and the project is due by 1/28/2016.

**Step 1** – Establish a Pre-Qualification solicitation within PennBid so that interested vendors or contractors can submit the required documentation by an established date. Generally, this is open to the public which is PennBid’s default setting.

<a href="#">Setup</a>   <a href="#">Events</a>   <a href="#">Categories</a>   <a href="#">Documents</a>   <a href="#">Questions</a>   <a href="#">Orders</a>   <a href="#">Bidders</a>   <a href="#">Bids</a>   <a href="#">Log</a>
<b>Solicitation - Setup</b>
Solicitation Title: Pre-Qualification RFP - (add your project title here)
Number: Shady Maple Authority
Bids Due: 12/30/2015 4:00:00 PM Eastern
Status: Open
Visible to Vendors: <a href="#">Currently Visible</a>   <a href="#">Hide</a>



**Step 2** – Based on the responses provided from the Pre-Qualification RFP, conduct a review process and identify "qualified" bidders.

**Step 3** – Set up the project within PennBid; however, within the Bidders tab, under Bidders List Options, click Edit, “Private, Invite by Company,” then Update.

Setup | Events | Categories | Documents | Questions | Orders | Bidders | Bids | Log

### Solicitation - Bidders List

Solicitation Title: Your Project Title Here  
Number: Shady Maple Authority  
Bids Due: 1/28/2016 4:00:00 PM Eastern  
Status: Open

Visible to Vendors: Currently Visible | [Hide](#)

The **Bidders** function allows for the overall management of the Bidders List. It is also used [Link to PennBid User Guide](#) and [Tutorial Videos](#).

#### Bidders List Options

Invitation Type  Public  Private, Invite by Company

Display Bidders List to Vendor

Enable Role Selection

Enable Intent to Bid



**Step 4** – Within the Bidders tab, Add the Pre-Qualified companies or individuals and click “Show” from any screen to make the solicitation available to them. As mentioned above, with the “Private” setting, only those invited will have any awareness or access to the solicitation.

Please contact us with any questions related to the process, various options available, or to assist with setting up the framework within PennBid.