

SD 42 PROCEDURE 4600.4

PURCHASING –COMPETITIVE BIDDING PROCESS

1. OBJECTIVES

Request for Proposals (RFP), Request for Tenders (RFT) and Request for Quotations (RFQ) are formal competitive bidding documents and processes used for larger dollar value purchases where it is considered to be in the school district's interest to incur the additional time and cost involved to:

- Access value added offers from qualified vendors
- Support fair and open bidding competition
- Utilize quantitative, qualitative and objective analysis for vendor selection and award

Each document and associated process has individual legal implications and are used in accordance to these requirements. Assessment of which document and process to be used rests solely with the Purchasing Department.

2. CONDUCT AND CONFLICT OF INTEREST

All participants in a procurement process, including any outside consultants or other service providers participating on behalf of the school district, must sign a conflict of interest declaration stating any perceived, possible or actual conflicts of interest.

All evaluation team members must sign a conflict of interest declaration stating that they have no conflicts of interest in respect of the procurement process, as well as a non-disclosure agreement agreeing to keep the content of bids and proposals confidential.

3. CONTENT OF COMPETITIVE BIDDING DOCUMENTS

RFPs, RFTs and RFQs provided to potential vendors will include, but are not limited to:

- a) General information, profile of the district, vendor submission process and instructions, evaluation and award criteria and, where feasible, timelines of completion and definitions and terminology related to the particular RFP;
- b) Description of the goods or services to be purchased referred to as the scope and requirement, including historical information, the current description of the service required, proposed term of the contract and specific objectives that are to be met
- c) Mandatory requirements;
- d) Notation of special conditions applicable to the particular requirement;
- e) Terms and conditions of the contract being contemplated;

- f) A Vendor Proposal Questionnaire that would include questions to support the evaluation and award criteria for corporate strength, financial, technology/quality/service and an opportunity for the vendors to include value added offers;
- g) Vendor proposed terms and conditions summary, conflict of interest, 3rd party purchased or piggyback option, and the vendor acceptance form. A checklist may be provided for the vendor to ensure all sections are noted and is provided to assist with their submission preparation to support a complete and higher quality response;
- h) Appendices which may include but are not limited to:
 - Vendor receipt confirmation
 - Standard terms and conditions
 - Pricing documents
 - Attachments (diagrams, maps or samples)

4. SOLICITATIONS OR ISSUANCE OF COMPETITIVE BIDDING DOCUMENTS

Originators complete and submit a requisition indicating the budgeted amount that will be committed for the requirement. Originators must be reasonably sure a contract award will occur.

Originators complete an Evaluation Criteria document that reflects the importance of weightings to be applied to the requirement. This process is conducted in consultation with the Purchasing Department.

Solicitations shall be posted on BC Bid inviting all interested vendors to submit bids for the contract.

A vendor pre-qualification process may be used, at the discretion of the Manager, Purchasing to ensure a competitive market is available for the requirement.

5. RECEIPT OF SOLICITATIONS

All formal solicitations will only be received at the Main Reception Desk at the District Education Office.

All solicitations received by the closing date and time specified will be date and time stamped.

Acceptance of facsimiles will be at the discretion of the Purchasing Department and in accordance to each requirement.

All solicitations received after the closing date and time specified are considered "late" and will not be accepted. Envelopes containing late tenders are to be time and date stamped. The Purchasing Department will return late submissions, unopened, to the sender with an accompanying letter.

6. OPENING OF VENDOR SUBMISSIONS (RPFs, RFTs AND RFQs)

All submissions received by the closing date and time will be opened and checked for mandatory compliance requirements. The Manager, Purchasing, may waive minor inconsistencies.

Public openings will be conducted in accordance to instructions included in the solicitation. Determination if a solicitation will be a public opening rests solely with the Purchasing Department and is usually reserved for Request for Tenders (RFTs) of high dollar value and where the requirements are very specific and clearly defined.

All solicitations will be opened, recorded and reviewed for compliancy by the Purchasing Department.

When Purchasing identifies that a submission does not appear to include mandatory requirements or complete documentation, Purchasing will:

- a) Double check the vendor's submission and its contents. Make an initial identification, subject to finalization, that the submission may not be accepted;
- b) Document the anomaly;
- c) Meet with the originator, to reach a conclusion with respect to the concern;
- d) Communicate any submission rejection to the vendor with a written notice.

7. QUALIFICATION OF BIDS AND EVALUATIONS

Compliant submissions will be evaluated in accordance to the weighted evaluation and award criteria. Consultation with the originator to review analysis will be conducted. If a disagreement or a concern is present and an agreement is not reached, the Manager, Purchasing, shall be consulted. Further analysis will be completed to ensure all processes have been conducted in accordance to the Competitive Bidding Law, applicable treaties, and the school district's policies.

All vendor submissions must include the vendor acceptance signed by the bidder.

8. SOLICITATION AWARD

All awards will be documented with an Approval of Award that may include the dollar value of the award without taxes, the award rationale, vendor rating, proposal summary, financial summary, quality statements, savings or revenue opportunities and follow-up dates. Signatures from the originator or users and authorized district personnel in accordance to their designated authority levels are required.

If the lowest bid or the highest rated vendor is not chosen, supporting documentation must be provided by the originator or authorized delegate.

All notifications or award will be issued by the Purchasing Department. No internal or external communications associated with the award are permitted until after the award documentation has been issued to the winning proponents and such communication should only be conducted by Purchasing.

All vendor debriefings will be directed and conducted by Purchasing with confirmed appointments. Vendor debriefing documents will be filed with the original solicitation.

District solicitations are subject to the *Freedom of Information and Privacy Act*. All requests are to be received in writing and directed to the Manager, Purchasing, in cooperation with the school district's Communications Department.

All paper documents will be filed in the Purchasing Department and will be retained pursuant to the requirements of *Policy 5701: Records and Information Management* and audit requirements.

RECEIVED FOR INFORMATION: February 8, 2017