



ADMINISTRATIVE PROCEDURES

SUBJECT: PURCHASE METHOD: FORMAL BID

1. PURPOSE

- 1.1. This outlines the requirements for conducting a formal quotation process including all forms of RFX, as defined in Regulation R-BU-503-10.
- 1.2. Quotation process is required for all consulting services, and for all other procurements in excess of \$5,000.

2. PROCUREMENT PLANNING

- 2.1. The school or department requesting the procurement shall provide the scope of supply or scope of services requested. This document must clearly outline the specifications of the items or services being purchased. In developing the scope, consideration needs to be given to what is being purchased, how it will be supplied, when it is required by, requirements regarding after purchase service, dimensions, etc.
- 2.2. Based on the item being purchased and working with the requesting department, the Purchasing Department is responsible for developing the procurement plan and for managing the procurement process.
- 2.3. An Evaluation Team, which is responsible for reviewing and rating the bids, will be selected and they will assist with the development of the specifications, evaluation criteria and weighting. The evaluation criteria and weighting will be included in the bid documentation to ensure that suppliers and the evaluation team understand how the bids will be evaluated prior to the bid close. Examples of criteria could include price, quality, transition costs, delivery, servicing, environmental considerations, the capacity of the supplier to meet requirements, experience, financial capacity of the supplier as well as any other factor directly related to the procurement.
- 2.4. The procurement plan will be approved in accordance with the table below:

	Approvers
One Time Purchase < \$25,000	Buyer
One Time Purchase between \$25,001 and \$100,000	Purchasing Supervisor Manager of Financial Services
Multi-year Agreement between \$0 and \$100,000	Purchasing Supervisor Manager of Financial Services
All Agreements >\$100,000	Purchasing Supervisor Manager of Financial Services Superintendent of Business

3. INFORMATION GATHERING

- 3.1. Where results of informal supplier or product research are insufficient to proceed with a bid, the LKDSB may undertake a formal process such as an RFI or RFEI, to assist in gathering information to plan a cost-effective and fair procurement process.
- 3.2. Use of an RFI or RFEI is to gather information only, and the responses cannot be used to pre-qualify a potential supplier or influence the change of the supplier becoming the successful proponent in any subsequent bids.

4. SUPPLIER PRE-QUALIFICATION

- 4.1. The LKDSB may issue an RFSQ to gather information about supplier capabilities and qualifications to pre-qualify suppliers for either an immediate need or in advance of expected future bids.
- 4.2. Pre-qualification of a supplier may be used when conducting a two-stage bid for a specific item, or to establish a vendor of record arrangement.
- 4.3. To ensure LKDSB obtains the optimum value for money and pre-qualified suppliers on a VOR remain competitive, the LKDSB must conduct a second-stage selection process in accordance with the dollar thresholds set out below:

Procurement Value	Minimum # of Pre-qualified Suppliers to be Invited to the Second-Stage Selection
\$0 - \$25,000	1
\$25,001 up to but not including \$100,000	3
\$100,000 up to but not including \$250,000	5
\$250,000 up to the VOR ceiling price	7
More than the VOR ceiling price	Open, competitive procurement

5. POSTING PROCUREMENT DOCUMENTS

- 5.1. Generally, all bids will be conducted utilizing an electronic tendering system. It is mandatory for all bids exceeding \$100,000.
- 5.2. A minimum response time of 15 calendar days, or longer as applicable trade agreements may require, shall be provided for all procurements exceeding \$100,000, and more time should be considered for highly complex, high dollar value and bids with risk.
- 5.3. The bid submission date and closing time must be on a normal working day, Monday to Friday excluding statutory holidays, and during regular office hours.
- 5.4. All communication regarding the bid, from the time the bid documents are issued until an agreement with a supplier is signed, must occur formally through the Purchasing Department.

5.5. From the start of the bid until the bid closes, the following formal communications will be used to respond to bidders:

- i. Addenda will be issued by Purchasing where the posted procurement documents need to be modified. If the addenda is issued within 7 days of the closing date, the bid submission date must be moved accordingly.
- ii. Question-and-answer responses are prepared when the procurement documents require clarification, but there is no need to modify the documents. Questions should be submitted at least 7 days before the closing date, however, questions submitted after may be considered and where warranted, the closing date may be extended.

6. PROPOSAL EVALUATION

6.1. Only Bids received prior to the closing date and time will be opened for consideration.

6.2. All bids submitted by the submission date and closing time will be evaluated against the established evaluation criteria stated in the bid documents.

6.3. All bids will initially be assessed for compliance with mandatory requirements. Only those bids that meet the mandatory requirements will be further evaluated.

6.4. After completing a signed conflict-of-interest declaration and non-disclosure of confidential information agreement, each evaluation team member must complete an evaluation matrix to rate each submission, and the evaluation scores shall be retained for audit purposes.

6.5. With the exception of pricing that was made publicly available, all submission evaluation details must be kept confidential.

7. CONTRACT AWARD

7.1. The bid that receives the highest evaluation score and meets all mandatory requirements set out in the procurement documents shall be declared the winning bid.

7.2. The Purchasing Department shall send a formal notification letter to the supplier selected as the winning bid.

7.3. The agreement with the successful supplier, in the contract form included in the bid procurement documents, must be fully executed before the provision of supplying goods or services begins.

7.4. After signing the contract, all unsuccessful proponents that participated in the bid will be notified a contract is signed and the bid process is complete. The unsuccessful proponents will be notified they have sixty days to request a supplier debriefing. Any bid disputes shall be resolved following the bid dispute resolution procedures that will be in accordance with the application trade agreements and outlined in the bid documents.

7.5. Where the procurement value is \$100,000 or more, a contract award notification identifying the successful supplier shall be posted in the electronic bid system.

8. CONTRACT MANAGEMENT

8.1. Where the item or service being purchased is less than \$5,000, the department or school will purchase the item and provide their purchasing card number as the form of payment.

8.2. Where the purchase exceeds \$5,000, the department or school will input a requisition in the LKDSB purchasing system and a purchase order will be issued by the Purchasing Department to the supplier in accordance with the terms of the contract.

8.3. The resulting contract will be managed responsibly and effectively by Board Staff in accordance with the terms of the contract.

8.4. Supplier performance will be documented and managed utilizing the Supplier Occurrence Report.

Implementation Date: September 1, 2021