

SD 42 PROCEDURE 4600.3

PROCUREMENT – COMPETITIVE BIDDING AND EVALUATION

1. OBJECTIVES

The primary objective in soliciting and selecting vendor bids and proposals is to service the operational requirements of the school district in a manner which realizes best overall value, while utilizing procurement processes which are open, competitive, and ethical.

Request for Proposals (RFP), Invitation to Tender (ITT), Invitation to Quote (ITQ), and Request for Pre-Qualification (RFPQ) are formal competitive bidding documents and processes used for large 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 with these requirements. Assessment of which document and process to be used rests with the Procurement Department.

2. CONDUCT AND CONFLICT OF INTEREST

All participants involved 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, ITTs, ITQs, and RFPQ's that are used to solicit competitive bids/proposals from potential vendors include, but are not limited to, the following:

- a) General information, profile of the school district, vendor submission process and timelines (ensuring sufficient time to submit responses), and instructions
- b) Evaluation and award criteria, including any weightings or any reference check requirements
- c) Definitions and terminology related to the particular competitive process
- d) Description of the goods or services to be purchased referred to as the scope and requirements, which may include historical information, the current description of the service required, proposed term of the contract and specific objectives that are to be met
- e) Mandatory requirements
- f) Notation of special conditions applicable to the particular requirement
- g) Terms and conditions of the contract being contemplated

- h) A 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
- i) Appendices which may include but are not limited to:
 - Vendor receipt confirmation
 - Standard terms and conditions
 - Pricing documents
 - Attachments (diagrams, maps, or samples)

4. ISSUANCE OF COMPETITIVE BIDDING DOCUMENTS

Originators work with the Procurement Department to request and assist in preparing competitive bidding documents, such as RFP or ITT, where there is a reasonable expectation that a contract award will occur.

An Evaluation Criteria document shall be completed that reflects the importance of weightings to be applied to the requirement.

All competitive bid documents are issued through Bonfire, the Board's cloud-based eProcurement sourcing platform, used for facilitating and managing competitive bidding processes.

All competitions for Contract's with an expected value of over \$75,000 are posted for advertisement on BC Bid, inviting all interested vendors to submit bids for the contract through the Bonfire platform.

A Request For Pre-Qualification (RFPQ) process may be used, at the discretion of the Manager, Procurement, to ensure a competitive market is available for the requirement.

5. RECEIPT OF BIDS/PROPOSALS ON FORMAL SOLICITATIONS

Submissions on formal solicitations (e.g. RPFs, ITTs, ITQs) are accepted online through the school district's Bonfire platform. Solicitations received through Bonfire are date and time stamped electronically.

All submissions received after the closing date and time specified are considered "late" and may not be accepted.

All submissions received by the closing date and time are reviewed by the Procurement Department for mandatory compliance requirements. The Manager, Procurement, may waive minor inconsistencies.

When the Procurement Department identifies that a submission does not appear to include mandatory requirements or complete documentation, they will:

- a) Double check the vendor's submission and its contents
- b) Make an initial identification, subject to finalization, that the submission may not be accepted
- c) Document the anomaly
- d) Meet with the originator, to reach a conclusion with respect to the concern
- e) Communicate any submission rejection to the vendor with a written notice or seek clarification from the proponent in regard to any missing information

6. EVALUATION OF BIDS/PROPOSALS

Compliant submissions will be evaluated by an evaluation committee of subject matter experts (usually involving the originator) in accordance with the weighted evaluation and award criteria. If a disagreement or a concern is present and an agreement is not reached, the Manager, Procurement, shall be consulted. Further analysis will be completed to ensure all processes have been conducted in accordance with competitive bidding legislation, applicable treaties, and the school district's policies.

The Procurement Department staff prepare a summary of all bids and proposals where written competitive pricing is required pursuant to Procedure 4600.1: Methods to Acquire Goods, Services and Construction. The summary provides an explanation of the key factors in considering a decision.

The procurement principles defined in Policy 4600: Procurement Goods & Services are to be applied in selecting any bids/proposals. Factors to be included in this consideration consist of:

- Best value for the school district
- Compliance with plans and specifications
- Availability of service or goods
- Included or extra warranty
- Service and facilities
- Value-added services provided by vendor
- Delivery date(s)
- Vendor past performance (determined through references)
- Administrative cost of conducting business
- Life cycle cost

These factors should be reflected in the award criteria within formal solicitation documents or considered directly in the evaluation of bids/proposals received through other methods.

The Procurement Department may meet with the originator seeking the acquisition or the pre-established evaluation committee to review the bid/proposal information and determine an award recommendation. Where the acquisition is routine and straightforward, of a small scale, or there is not a single originator or committee to consult with, the Procurement Department shall decide on the award.

The school district, at all times, reserves the right to reject bids and proposals on any items, whether because of price consideration or for any other reason that would appear to make it inadvisable to buy under the term of the bid or proposal submitted or to conclude any agreements without going out to tender.

7. SOLICITATION AWARD

Decisions on awards are documented on a Recommendation To Award form for approval by the senior leadership team member responsible for the acquisition. The form content may include the dollar value of the award without taxes, the award rationale, vendor rating, list of evaluation committee members, proposal summary, financial summary, quality statements, savings or revenue opportunities and follow-up dates.

All notifications of award are issued in Bonfire by the Procurement Department after a contract is signed with the successful proponent. No internal or external communications associated with the award are permitted until after the award documentation has been

issued to the successful proponent(s) and such communication should only be conducted by the Procurement Department.

Unsuccessful proponents are notified in writing. School District personnel are not obligated to provide information to unsuccessful vendors. All vendor debriefings are directed to and conducted by the Procurement Department with confirmed appointments. Vendor debriefing notes are filed with the original solicitation.

All solicitations are subject to the *Freedom of Information and Protection of Privacy Act* (FIPPA). All FIPPA requests regarding procurement solicitations regarding procurement solicitations received shall be processed in accordance with Procedure 5700.1 Management of Information and Access Requests.

APPROVED: February 8, 2017

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