



District of Lantzville

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Purchasing, Consulting & Publicly Tendered Contracts

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POLICY

The District of Lantzville (the District) engages in the procurement of goods and services for its operations. The guidelines in this policy are provided to assist all internal staff to achieve best value for dollars expended by the District.

Authority: Persons undertaking procurement actions must have formal authorization to do so. All goods and services are to be acquired in accordance with this policy unless authorized on an exception basis by the Chief Administrative Officer (CAO).

DEFINITIONS

Invitation to Tender:	This is a formal request for <u>sealed bids</u> for the supply of specific goods or services in response to an advertised invitation. The purpose of a tender is to eliminate the need for negotiations with tenderers and replace this with competition between the tenderers.
Purchase Order: (PO)	A legally binding document issued by the District to a vendor for the purpose of specifying the item, quantity and agreed upon price for the purchase of goods or services.
Purchase Card:	A corporate credit card authorized by the Chief Administrative Officer and the Director of Financial Services to be issued to specified employees for purchases within defined parameters as outlined in the Purchase Card policy.
Quote or Request for Information: (RFQ)	This is a less formal process. The request for quotes or information may not necessarily develop into a supply contract.
Request for Proposal: (RFP)	This is a formal request for submissions. <u>AN RFP IS NOT A TENDER</u> . It is not as specific as an Invitation to Tender. An RFP describes an opportunity or problem and asks for solutions and costs for addressing those specific opportunities or problems.

PROCEDURES

1. GENERAL INFORMATION

◆ Principles:

Staff shall not use their authority or office for personal gain and shall seek to uphold and enhance the position and reputation of the District by maintaining a standard of integrity in all their business relationships both inside and outside the District that is above reproach; and by optimizing the use of resources for which they are responsible so as to provide the maximum benefit to the District.

◆ **Cost of Ownership:**

The District recognizes that the lowest price is not always the best value. Employees of the District who are required to use corporate funds for goods or services are encouraged to look at the total cost of ownership, which may include but not be limited to the following:

- Acquisition cost
- Maintenance cost
- Quality of product/service
- Warranties
- Training cost
- Services availability for the District
- Performance, including previous performance

◆ **Freedom to Choose:**

All documentation is to be written in such a manner as to give the District the greatest freedom possible in choosing a supplier, contractor or consultant.

◆ **Emergencies:**

It is recognized that emergency situations may arise where the immediate acquisition of goods or services is essential. In those situations, the Department Head will determine the process required to acquire those essential goods or services. Depending on the financial severity of the emergency, a report to Council may be required. The CAO will determine when Council is to be advised. Whenever the District's Emergency Program is invoked, the procedures in the plan overrides this policy.

◆ **Authority and Responsibility:**

The CAO delegates Purchasing authority throughout the organization as set out below.

The Department heads are responsible for ensuring the Purchasing Policy is followed within their areas of control in order to:

- ✓ ensure that expenditures comply with the District's budget.
- ✓ ensure that sufficient analysis and discussion has taken place.
- ✓ ensure the risk of error, fraud and embezzlement is minimized.
- ✓ ensure that staff have appropriate signing authority for the purchases they undertake.
- ✓ ensure that goods and services being purchased are of the best value to the taxpayer.

2. GENERAL PURCHASING STANDARDS

- ◆ The following agreements will be consulted and tender notices in these cases will be posted on the BC Bid's web site (www.pc.gov.bc.ca):

- The Agreement on Internal Trade (A.I.T) for purchases in excess of \$100,000 and construction projects in excess of \$250,000 or as amended by legislation from time to time.
- British Columbia Alberta Trade, Investment, and Labour Mobility Agreement (TILMA) for purchases in excess of \$10,000 for goods, \$75,000 for services, and \$100,000 for construction projects, or as amended by legislation from time to time.
- ◆ Supplier lists (if established by the District), will include all interested and qualified suppliers.
- ◆ The process for selection of suppliers involving standing purchase orders (several similar purchases from a single vendor over time) must be based on the total value of the standing purchase order, not on the individual component purchases.
- ◆ Contract documents shall form part of the tender package. The signing authority for the contract will be in accordance with this policy.
- ◆ All contracts must include the District’s current liability requirements.
- ◆ All requests for bids must specifically include or exclude GST and PST.
- ◆ Contractors, sub-contractors or suppliers who, either directly or indirectly through another corporation or entity, who are in litigation, or have served notice with intent to proceed with court action against the District that is in connection with the project in question or any analogous contract for works or service, are ineligible bidders and will be disqualified from the tender evaluation.

3. PURCHASING AUTHORITY LEVELS

This schedule refers to the approvals required for the various dollar values of procurement. Other than in emergencies, **budget approval is required before the purchase is made.**

DOLLAR AMOUNT APPROVAL THRESHOLDS

Once Council, through the budget process, has approved funds for the purchase, the following thresholds apply:

Estimated Value of	Procedure to use	Approval Required
Greater than \$500,001	Report/Recommendation to Council.	Council approval required.
\$201,000 to \$500,000	Use the tender process. Request for Proposal may be used with approval of the CAO. Letter awarding contract is to be issued. Contract to be signed before work begins.	CAO approves and signs contract upon recommendation of Department Head. Approval of Council required for selection of other than low tender.

Estimated Value of	Procedure to use	Approval Required
\$50,001 to \$200,000	Use a Tender call or Request for Proposal. Letter awarding contract is to be issued. Contract to be signed before work begins.	Department Head and CAO
\$10,001 to \$50,000	Obtain three (3) written quotes or issue a Request for Proposal, enter into a contract. If the value is \$25,000 or less, Issue a Purchase Order upon Selection.	Department Head and CAO
\$5,001 to \$10,000	Obtain three (3) written quotes. Issue a Purchase Order upon selection.	Department Head or Authorized Staff
\$1 to \$5,000	Use a Purchase Card or charge on account	Cardholder

* **Note:** purchase orders are only to be used for purchases of \$5,000-\$50,000.

For purchases from \$50,001 to \$150,000, the decision between the use of a Tender or a Request for Proposal will be made in consultation with the CAO.

Contracts up to \$200,000 may be renewed with the approval of both the CAO and Department Head. Only one renewal, for a term no longer than the original term, may be approved. The maximum length of approval for the combined original contract plus one renewal term cannot exceed six (6) years.

Select tenders may be used in specific circumstances. The Administrator is to be involved in the decision to use select tenders.

4. **ADMINISTRATIVE PROCEDURE**

The responsibility for the processing, documentation, and retention of tenders and requests for proposal rests with the issuing Department Head. No tender is to be issued until the required land and/or rights-of-way have been acquired, without prior approval of Council.

- A. **DETERMINE THE PROCESS OR TOOL TO BE USED** (using Purchasing Authority Levels as guide)

1. INVITATION TO TENDER

Description: Sealed tenders will be submitted by a specific date and time, and will be opened in a public process at a specified date and time. The Tender Form and Specifications are drafted by the Department Head or designate requiring the goods or services. Sealed bids must conform to the instructions in the tender request. Following the public opening, the Department Head or designate will evaluate the bids and make a recommendation to the CAO.

Preparation and Issuing:

- Each set of tender documents is to be prepared by the issuing Department Head and approved by the CAO if the value is over \$50,000 before being released to the suppliers.
- Each tender is to be numbered sequentially e.g. department; tender number and year. For instance, ADMIN #03.18 is the number of the third tender issued by Administration in 2018.
- Tenders are to be addressed to the **originating Department** and they are to be opened at the Municipal Hall. Tenders are to be received as directed by the Director of Corporate Administration, at the front counter and forwarded to the originating Department.
- Each tender is to outline what documents must be enclosed with the tender. Remember that failure of the tenderer to supply any of the required documents at time of tender opening will likely result in the tender process being rejected.
- Tender is to specify if prices are to be **inclusive of all taxes**.
- Each tender must include a waiver to be signed by the tenderer allowing the District to abandon the tender process if there is only one tender submitted.
- Each tender must include all relevant property and liability insurance requirements.
- The District reserves the right to abandon tenders if they are over the approved budget.

Process:

- Once approval of the tender documents is obtained, the tender documents are released to suppliers.
- Tender is advertised specifying a final submission deadline that coincides with the Tender opening time.
- Tenders will be publicly opened by the Department Head or their designate.
- A log will be kept of all tenders submitted.
- Tenders will be evaluated and a recommendation made to the Department Head and/or CAO.

- Once a decision has been made and the required approvals obtained, a written response will be made to all bidders.
- The successful bidder will receive confirmation of the award by way of letter.
- Written documentation/contract will be prepared, signed and distributed.

Tender opening: Tenders will be opened publicly in the presence of at least one Department Head or their designate, and one staff member.

- Complete the form attached as Appendix “D”
- Record the attendance
- Commence opening at the advertised time.
- Open each bid
 - Record the name of the bidder
 - Record the documentation attached (i.e. bid bond, performance bond)
 - Record the tender amount
 - Stamp the tender with date stamp and initial the tender document.
 - The opening is public. The name of the bidder and the tender amount is read and is available to the public.
 - Once the tenders are all opened, the public process is complete.

Completion of tender process:

- After the opening of the tenders, the originating Department does the analysis and makes a recommendation to the approving authority in accordance with the purchasing authority thresholds. If the recommendation is for other than the low tender, a report must be prepared for Council as their approval will be required.
- No communication regarding the result of the tender process is to be made to any tenderer until the appropriate approvals have been received.
- Once approval is received by the originating Department Head, all bidders will be advised in writing of the result.
- Any follow-up documentation (contracts, bonds, securities, worksafe certification, insurance, etc) is the responsibility of the originating Department Head.
- The tender documents and all related materials are to be retained on file by the originating Department Head.
- Tenders from both the successful and unsuccessful tenderers shall be open for public inspections.
- No work is to be commenced or product provided until a contract and required documentation is in place.
- A Purchase Order is required for the commencement of the work.

Execution of public tender requiring a contract: The Department Head or CAO will have the contract prepared, and the successful tenderer will be notified that the contract is ready for execution. The Department Head will ensure that the company is in good standing and has a current business licence, Worksafe BC coverage and insurance coverage.

When bid bonds are required, the issuing Department Head shall return the bid bonds to the unsuccessful bidders.

Once the contract has been executed by both parties, copies will be distributed as follows:

- Original signed copy of contract in a secure cabinet.
- One copy to the tenderer
- One copy to the issuing Department Head and all tendered contract documents will be retained by the issuing Department Head.
- One copy to the Director of Financial Services.

Responsibility for Administration of Tender Contract: The responsibility for the ongoing administration of a publicly tendered contract shall reside with the originating Department Head in consultation with the project consultant (if any). Such administration shall include: ensuring the contract is signed before work begins; monitoring the performance of the contractors; managing payment to the contractors; tracking revenues and expenditures on the project; managing any changes and/or change orders to the contract documents; and managing the completion of the project.

Security: All tenders or requests for proposals for the construction of municipal infrastructure works or the provision of goods and services shall contain a requirement to provide security to the District to protect against any failure to complete or other contract breaches.

The invitation to bid must include the required security, to be in the form of bonding, letter of credit or cash, as applicable and shall also require compliance with holdback requirements under the *Builders Lien Act*

Construction: For construction work, the security will be in the form of a performance bond or material/labour bonds or a bank issued letter of credit.

The amount of such security should protect the District if the contractor breaches the contract and shall be in the form of bonding acceptable to the District in the full amount of the contract or a letter of credit in the amount of 125% of the contract (which may be reduced periodically as work is completed to the satisfaction of the District) to ensure the works can be completed by the District if it has to step in after default and/or if the contractor is unable to perform such work.

Services: For service contracts (such as garbage collection) security should be provided by way of a letter of credit or cash.

The amount of such security should represent the estimated additional costs to the District to ensure the service is provided or the work is performed, if the District has to step in after default to retain an alternative contractor and/or if the contractor is unable to perform such work.

Performance bonds and insurance coverage documentation shall be attached to the original signed contract and kept in the secure cabinet.

Letters of Credit or cash shall be controlled by the Director of Financial Services. Copies and receipts are to be retained on file by the originating Department Head.

2. REQUEST FOR PROPOSAL (RFP)

Description: There may be more than one solution presented in the submissions. An RFP is an invitation to proponents to negotiate with the District for the procurement contract and it is an indication of the District's intention to consider the proponents submissions and thereafter negotiate with one or more of the proponents without binding the District in any way. It also gives the District, in its sole discretion, to accept or reject any proposals missions or cancel the RFP.

Preparation and Issuing:

- Request for Proposal is drafted by the Department Head and approved by the CAO.
- Evaluation criteria is preset and approved, and the criteria forms part of the RFP package (see sample in Appendix "A").
- Each RFP is to be numbered sequentially in a similar manner as tenders, followed by RFP. Example: ADMIN.RFP #03.18.
- The RFP is either advertised, or the request is sent to specific, pre-qualified suppliers. A formal pre-qualification process is to be determined and pre-approved by the Department Head.
- RFP submissions are to be addressed to the **originating Manager**.

Each RFP must contain the following:

1. A statement that it is a request for proposals only and will not give rise to a Contract "A" (bid contract)
2. A statement advising the proponents that the District is free to negotiate with any of the proponents and that as a result of the negotiation process the District is not required to treat all proponents equally.
3. A statement that the process is NOT a tendering process.

4. A statement that no legal relations are intended to arise from the RFP process.
5. A statement that the District is NOT contractually bound to any matters until such time as the District has negotiated a **contract**.
6. A statement limiting the District's exposure for costs on claims relating to the RFP process including the costs of preparation of the RFP document.
7. Specify the date and time the proposal is to be submitted.

All RFP's shall include a clause encouraging bidders to include innovative creative ideas in their proposal. The evaluation criteria for the submissions must be clearly defined to allow the bidders to have assurance that the evaluation process will be consistent (see Appendix A). The RFP process forms complex legal obligations. Any uncertainty regarding the process shall be referred to the CAO.

Process and completion.

- No public opening is required.
- Log kept of all RFP's submitted.
- Evaluation of RFP's and recommendation is to be done by a team (two or more members) appointed by the Department Head or CAO.
- Review and approval of recommendation in accordance with required approval per Appendix "A".
- Letter awarding proposal to successful proponent, commencing negotiations for a contract.
- Written response to all unsuccessful proponents.

3. QUOTE OR REQUEST FOR INFORMATION

Description: Before a quote is accepted, a minimum of three quotes must be obtained unless otherwise agreed to by the CAO. Additional information or clarification from suppliers may be obtained by the Department Head or designate prior to or during the evaluation process. Quotations should be submitted directly to the Department Head or designate requesting the quotation. The process steps are:

- Request for quotations will be sent to known suppliers of the goods or services.
- Request for quotations will indicate a deadline for the return of the quotations. Quotations received prior to the deadline will be kept confidential.
- All bidders will be advised of any changes to the deadline or the request for quotations.
- A record will be kept by the issuing Department Head or designate of the persons or firms who are invited to submit quotations and will keep all quotations received.

- Quotations received will be evaluated by the Department Head or designate for all quotations between \$10,001 and \$50,000.
- Purchase order or contract (See Purchasing Authority Levels) will be issued to the successful supplier.
- The request for quote must include the following statement: “only the successful supplier will be contacted”.

B. ADVERTISING

Shall comply with the District’s advertising policy with regard to purchasing.

C. DISCLOSURE

The District shall not knowingly disclose the contents of a Tender, RFP or Quotation submission and shall take reasonable measures to safeguard the confidentiality of the contents of same, subject to the provisions of the Freedom of Information and Protection Privacy Act

D. SPECIFIC PURCHASE ITEMS:

1. Hired equipment – construction and maintenance

Quotation calls only will be made for one-year standing offers. Equipment will be hired throughout the year based upon price, availability, and condition of equipment.

2. Annual supply contracts

For major annual supply contracts expected to be in excess of \$50,000 (i.e. gasoline, gravel, etc.) tenders are to be issued unless there are unusual circumstances warranting another procedure. The approval of the CAO must be obtained if a tender process is not used.

3. Professional Services

Where professional services other than consultants are to be retained on an ongoing basis, a review will be undertaken every five years. These services include but are not limited to:

- Banking services
- Insurance services
- Auditing services
- Employee Benefit Plan brokerage services

These services will be requested by way of an RFP. The evaluation criteria will be set out in the RFP and evaluation of the proposals will be undertaken by the relevant Department Head. The recommendation will be approved by the CAO and a report prepared for Council, who will appoint the successful bidder. In addition to the professionals appointed by Council, other professionals may be engaged for specialized services upon the approval of the CAO.

Real Estate and Legal Services are acquired as approved by the CAO.

4. Professional Consulting Services

- (a) In order to achieve a balance between continuity and competitiveness, professional consulting services shall be retained for District Projects as required.

Consultants will be retained on the basis of expertise, experience, professional reputation, ability to complete the work and to provide cost-effective advice and solutions. The Department Heads will not rely on one consultant to provide the majority of consulting services. A consultant will be recommended by the Department Head and approved by the CAO.

- (b) **On-Going Professional Services:** A consultant will normally be retained to provide ongoing consulting services in each of the following areas:

- Land Use Planning
- Environmental Assessment
- Social Planning
- Landscape Architecture
- Wastewater Collection, Treatment & Reclamation
- Water Supply, Treatment & Distribution
- Storm Water Management
- Transportation & Traffic
- Pavement Management
- Geotechnical
- Survey (not including legal survey)
- Water Conservation
- Civil & Structural
- Computer Consulting Services

5. Consulting Services for Municipal Projects

For the purpose of this policy, the District projects (capital works and reports) will be defined as:

- Small projects, where fees do not exceed \$25,000
- Medium-sized projects, where fees are between \$25,000 and \$75,000
- Large projects, where fees exceed \$75,000

Small Projects: Consultants for small projects may be selected without a proposal call. Approval from the CAO is required prior to engaging the consultant.

Medium-sized Projects: Consultants for medium-sized projects should be selected using an RFP. The RFP is normally sent to only three consultants. Approval by the CAO is required for the final consultant selection for medium-sized projects.

Large Projects: Consultants for large projects should be selected using a two-part Proposal Call. Firstly, consultants will be short-listed from an Expression of Interest Call, and normally three consultants will be invited to respond to the formal Proposal Call. Approval by the CAO is required for consultants selected to provide consulting services for large-sized projects. An **Expression of Interest** call is a request to various firms or companies for an expression of interest in a particular project. There are no project details or prices in an Expression of Interest. Rather, this is a document setting out the expertise of the firm in the area covered by the project, and details the qualifications of the persons who will be involved in the project as well as the qualifications and relevant history of the firm.

6. Proposal Call Evaluation

The form of the proposal evaluation must be established concurrent with the request for proposal. Relevant experience and capability of staff assigned to the work, understanding of the scope of work, corporate depth and quality of the proposal should be the most compelling factor in consultant selection. Price, at best, should only be a minor component of the evaluation process. Where appropriate, the “two-envelope” system and the “fixed-fee” system may be used in the evaluation process, subject to the approval of the CAO.

E. HOLDBACKS

All construction contracts are subject to holdbacks. This is a percentage of payment retained by the District until the project is completed, and until a certain time period has passed. There are specific regulations including the *Builder’s Lien Act* which apply to holdbacks. The process of retaining and releasing holdbacks is subject to regulations which change from time to time. The holdback process on any project is to be referred to the Director of Financial Services.

F. INVOICE APPROVALS

Invoices require the signature of the relevant approving authority in accordance with this policy. Invoices will not be paid until such approval has been obtained.

- APPENDIX A -

A. RFP - EVALUATION CRITERIA

Request for Proposals are used to obtain submissions for specific works, services, solutions and equipment. Request for Proposals will be evaluated based on a variety of factors which are detailed in the RFP.

A minimum of two staff members will typically do the evaluation of the Request for Proposals. These employees will collaborate to complete a consensus rating. Occasionally, more than two evaluators may be used.

The evaluation will consider several key items, weigh them according to our interpretations of relevance, and then develop a total point structure for each. **It is not the intent of this evaluation to remove subjectiveness from the evaluation process, but the intent is to guide those individuals reviewing the submissions, so they do not miss important criteria or give excessive weight to items of less importance.**

Each Request for Proposal call may have different categories for evaluation and each may be weighted differently. Typically, the evaluation criteria used will be provided as part of any Request for Proposal call. The District also recognizes that evaluations that score within 5% of others may be essentially equivalent and therefore selections will be made with emphasis on key personnel, work plan, schedule and availability.

B. DESCRIPTION OF EVALUATION CRITERIA

1. Key Personnel

The details and expertise of the Key Personnel will be evaluated as related to the scope of work. Emphasis will be placed on personnel demonstrating similar experience, including type, size and magnitude of work. This is to also include the following:

- Sub-consultants
- Assigned staff
- Principal field Inspector

2. Experience

Corporate experience should demonstrate the degree of involvement with similar projects. Local experience should indicate involvement with projects on Vancouver Island. The bidding firms' experience must demonstrate involvement with projects of similar scope, size and complexity.

3. Work Plan

The details required in the work plan have been identified in the Request for proposal. The evaluation will determine if the firm/individual has met the requirements. Innovative procedures and better project understanding will also be evaluated here. Identification of the level of effort for each team member, in each phase of the project, is required.

4. Schedule

The details required in the schedule plan have been identified in the Request for Proposal. The evaluation will determine if the firm/individual has met the minimum schedule requirements.

5. Fee and Level of Effort

This section may be submitted in a separate, sealed envelope, marked “Fee Proposal”.

Upset fees have been requested for detailed design, tendering and post construction services. An estimated fee for the contract administration has been requested. Fees for key personnel, support staff and disbursements must be identified. The corporate fee schedule must also be included should additional work beyond the terms of reference be requested. The evaluation will be based on a comparison to the other consultants. Obvious imbalances in the fee breakdowns may result in rejection of the consultant’s submission.

The Level of Effort will be evaluated with the Work Plan and will be based on the methodology, innovation and recommendations of the proposal.

C. EVALUATION CRITERIA WEIGHING

Each category will be rated at one of five levels – Poor, Fair, Acceptable, Good and Excellent. The evaluator may assign mid-point marks to properly assess the proposal’s ranking.

➤ **KEY PERSONNEL**

- | | |
|------------|---|
| Poor | Lacks experience in comparable projects and objectives. Does not have adequate resources and expertise to make qualified recommendations based on the terms of reference. |
| Fair | Minimal experience in comparable projects and objectives. |
| Acceptable | Adequate experience in comparable projects and objectives. May make recommendations based on assumptions and results of similar projects without direct involvement in them. |
| Good | Demonstrates a solid understanding and considerable level of expertise in terms of accomplishing objectives. May make recommendations based on a similar project experience. |
| Excellent | Excellent understanding of objectives and terms of reference. Experience and expertise demonstrated in numerous past projects. Recommendations would be based on experience gained from direct involvement in a wide variety of projects similar in criteria. |

➤ **EXPERIENCE**

- | | |
|------------|---|
| Poor | No experience related to proposed project. |
| Fair | Minimal experience related to proposed project. |
| Acceptable | Some experience related to proposed project. |

Good	Experienced related to proposed project.
Excellent	Significant experience related to proposed project.

➤ **WORK PLAN**

Poor	Lacks information to determine if the consultant understands the assignment and/or written statements indicates the consultant clearly does not understand the project.
Fair	Minimal information – consultant uses generic terminology that could be used to describe the project or any project of similar nature.
Acceptable	Adequate information to show the consultant understands the basic project.
Good	Details indicate a full and complete understanding of the project.
Excellent	Details indicate a full and complete understanding of the project. Information shows the consultant has included some innovative ideas that demonstrate the depth of understanding.

➤ **SCHEDULE**

Poor	Schedule provided is not in requested format and/or is of an unacceptable duration.
Fair	Minimal detail, no indication of actual resources dedicated to the project, duration is at or over expected completion date.
Acceptable	Detail sufficient to show adequate resources, duration is at expected completion date.
Good	Detail sufficient to show adequate resources, duration is shorter than the expected completion date.
Excellent	Extensive amount of detail – suitable for terms of reference level, duration is significantly shorter than the expected completion date. Depending on the project, availability to start the project immediately may be a significant criteria.

➤ **FEE**

Fee rating will be assessed from lowest to highest with a provision for inspection personnel and possible reduced onsite hours of inspection.

Poor	Greater than 10 % higher than middle fee submission.
Fair	Up to 10 % higher than middle fee submission.
Acceptable	Middle fee submitted.
Good	Up to 10 % lower than middle fee submission.
Excellent	Greater than 10 % lower than middle fee submission.

- APPENDIX B -

EXAMPLE ONLY

VALUATION MATRIX FOR REQUEST FOR COMPLEX PROPOSAL

Project Title: _____ Date: _____

Consultant: _____

Manager: _____

Category	Point Value						Total
		Poor 0	Fair 0.3	Acceptable 0.5	Good 0.75	Excellent 1.0	
Key Personnel and Support Staff:							
Project Manager	20						
Design Staff	15						
Site Inspector	10						
Sub-Consultants	5						
Experience:							
Corporate	10						
Local	5						
Project Manager	10						
Detailed Work Plan	30						
Detailed Schedule	20						
Proposed Fee:							
Design Upset Fee	10						
Tendering Upset Fee	5						
Site Inspection-Hourly & call out	5						
Contract Administration-Hourly	4						
Post Construction Upset Fee	1						
Total Points Available	150	Total Points:					

- APPENDIX C -

EXAMPLE ONLY

EVALUATION MATRIX FOR STANDARD PROPOSALS

CATEGORY	Point Value	Total
1. Key Personnel and Support Staff	15	
2. Experience, (Considered from EOI submittal)	30	
3. Detailed Work Plan	30	
4. Detailed Schedule Plan	10	
5. Fee Proposal	15	
Total Points Available	100	

The principles and procedures outlined in this policy should always be used in conjunction with the buyer's discretion and good judgment.

- APPENDIX D -

Tender Opening Form

TENDER #	
TITLE:	
CLOSING DATE:	TIME:

IN ATTENDANCE:	

BIDDER	RDN	DOCUMENTATION			TENDER AMOUNT
		YES <input checked="" type="checkbox"/>	NO <input type="checkbox"/>		
		Bid Bond	Performance/ Labour/ Material Bond	Form of Tender	

SIGNATURES:

MANAGER/ REPRESENTATIVE