

PROCUREMENT SERVICES

Guide to Competitive Bidding





Objective

UFV strives to obtain goods and services in an open, fair, transparent and non-discriminatory manner that provides the best value to UFV through a public competitive bidding method to select the right supplier for your purchase or project involving acquisitions **over \$75,000**. Procurement Services works closely with you to create a Competitive Bidding Document that best captures your needs. It is this document that we post

publicly on Bonfire and upon closing, help you to evaluate submissions to select the right supplier for your needs. The objective of the entire process, which typically can take anywhere from **8-12 weeks**, is to assist you in purchasing the goods and services that meet your department's unique needs. This process offers you best value, while satisfying UFV's Purchasing and Competitive Bidding Policy (130) and our obligations under Provincial and Federal Trade Agreements and Canada's public procurement law.

Roles & Responsibilities

Project Team

The Project Team includes members from your department and Procurement services, who work together to detail the requirements of your project, in a document called Appendixes C & E.



Client Project Lead

The Client Project Lead represents the project team and is the designated liaison with Procurement Services.



Evaluation Committee

The Evaluation Committee is comprised of members from both your Project Team and your department. Other participants may include specialists from other departments, such as IT and external subject matter experts who may be engaged to advise the Project team.



Procurement

Procurement Services will manage the entire competitive bidding process to best meet the needs of your project and your department. Procurement representatives are trained in public procurement, including the laws governing competitive bidding in Canada.



Legal Expert

Legal expertise, if required, will be solicited by Procurement Services.

Types of Bid Documents

RFP

Request for Proposal

RFQ

Request for Quotations

RFPQ

Request for Pre-Qualification

RFI

Request for Information

NOI

Notice of Intent

Stage I - Gathering Information & Creating the Document

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Initiating

Contact Procurement Services as early in the project as possible to ensure sufficient time for planning and conducting the competitive bidding processes. Contact Procurement Services by e-mail at procurement@ufv.ca.

Requirements:

Client Project Lead:

- Requisition of need
- Estimated timeline

Procurement:

- Research:
 - Existing UFV Contracts
 - BC Net Agreements
 - BC Gov Agreements
 - Trade Agreements
 - Policies
- Run Reports

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Preliminary Meeting

The Project Team and Procurement Services will meet to discuss your project, the competitive bidding process, and your role in creating Appendixes C & E, a detailed outline of your requirements.

Requirements:

Project Team:

- Competitive Bidding Kick-Off Meeting to review:
 - Competitive Bidding Process
 - Roles & Responsibilities
 - Appendixes C & E

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Developing Requirements

The Project Team, with assistance from Procurement Services, will complete the outline of your projects requirements, using the Appendixes C & E Documents.

Requirements:

Procurement:

- Guide to Completing Appendix C & E

Client Project Lead:

- Complete Appendixes C & E Documents

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Finalizing the Bid Document

Upon receiving your completed Appendixes C & E Documents, Procurement Services will consolidate the overall Competitive Bidding Document.

Requirements:

Procurement:

- Draft (using Templates) the Competitive Bidding Document

Project Team:

- Competitive Bidding Document Review Meeting to:
 - Review finalized document
 - Receive posting approval

Stage II - Selecting a Supplier

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Posting & Closing

Procurement will post your project (the Competitive Bidding Document) publicly on Bonfire to offer all suppliers a fair, equitable and transparent opportunity to submit a proposal.

Requirements:

Procurement:

- Bonfire Posting
- Draft Scorecard
- Facilitate and post Addendums

Project Team:

- Site Tour (if applicable)

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Evaluating

Procurement Services will record the opening of all supplier submissions and your Evaluation Committee will rate them according to criteria your Project Team establishes in Appendix E.

Requirements:

Procurement:

- Facilitator's Guide to RFP Consensus Evaluations
- Evaluator's Guide to RFP Consensus Evaluations
- Evaluation Team Confidentiality Agreement
- Relationship Disclosure Declaration & Undertaking Form

Evaluation Committee:

- Individual scoring
- Consensus Scoring Meeting & Scorecard
- Evaluation Committee Consensus Meeting Recommendation

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Negotiating

In consultation with the Project Team, Procurement Services may negotiate with the selected supplier to further meet your project needs.

Requirements:

Project Team:

- Negotiation Strategy including structure of the deal & T&Cs

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Contract Award

In consultation with the Project Team, Procurement Services and Legal will draft the contract and award the contract to the selected supplier. Procurement Services will post a Notice of Contract Award on Bonfire/BC Bid and with the Project Team provide debriefings as requested.

Requirements:

Client Project Lead:

- Complete SPR

Procurement & Legal (if applicable):

- Finalize Contract

Procurement:

- Complete PO
- Issue Notice of Contract Award
- Filing Package

Project Team:

- Debriefing Script
- Debriefing Meeting

Tips for Communicating with Suppliers

1. All suppliers must be treated fairly and impartially. Conduct business communications with integrity, fairness, and openness in compliance with our Purchasing and Competitive Bidding Policy (130).
2. Avoid situations that may present conflicts of interest while dealing with persons or organizations doing business or seeking to do business with the UFV.
3. Declare any conflict of interest to Procurement Services that could give a supplier an unfair advantage during the competitive bidding process.
4. Don't accept favours or gratuities from current or potential suppliers to UFV.
5. When doing market research, please make it clear to any potential supplier that UFV must conduct an open competitive bidding process, and that information acquired in the market research phase may be used to assist in the development of a competitive bid document.
6. Do not express preferences or opinions about a particular product or service to avoid a misunderstanding that a particular product or service might be the winner.
7. Confidentiality is a strict requirement of the entire competitive bidding process, beginning with the formation of a Project Team through to the award of a contract.
8. Once a competitive opportunity is posted, do not communicate with supplier's interest in your project and all queries must be directed to the Procurement Services.
9. Do not discuss the bidding project with others outside of the Project Team or Evaluation Team. Leaks could lead to cancellation of the bidding process, or worse, litigation by an aggrieved bidder.
10. Do not share copies of any UFV documents or any submissions received in response to a competitive bid.

Bid Resolution Process

In the case of disputes over an awarded bid, the unsuccessful bidder must follow a specific course of action.

The first step is to schedule a debriefing with the Procurement Services. Debriefings must take place within fifteen (15) business days following Notice of Contract Award. Requests received after this time frame will be considered on a case-by-case basis.

If the matter is not resolved in the debriefing and the unsuccessful bidder still has concerns with a procurement process following a debriefing and wishes to formally dispute the outcome, they must file a written bid dispute notice with the Director, Supply Chain by registered mail, within fifteen (15) business days of the debriefing.

The bid dispute notice must include:

- The name and address of the bidder
- Reference number and title of the bid solicitation
- Detailed and factual statement of the grounds for the dispute
- Supporting documentation
- Designated contact during the bid dispute process

www.ufv.ca

Reference Documents

- **New West Partnership Agreement (Governments of BC, Alberta and Saskatchewan)**
<http://www.newwestpartnership.ca/>
- **Canadian Free Trade Agreement – All Provinces**
<https://www.cfta-alec.ca/>
- **UFV Purchasing and Competitive Bidding Policy (130)– Internal Policy**
[https://www.ufv.ca/media/assets/secretariat/policies/Purchasing-and-Competitive-Bidding-\(130\).pdf](https://www.ufv.ca/media/assets/secretariat/policies/Purchasing-and-Competitive-Bidding-(130).pdf)

This guide is brought to you by Procurement Services to assist you through the formal competitive procurement process. We look forward to working with you in all your procurement needs. Please contact us via e-mail at procurement@ufv.ca.