



***Doing Business With the
City of Belleville
&
City of Quinte West***

PRESENTED BY:

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The Corporation of the City of Belleville**

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The Corporation of the City of Quinte West**

June 21, 2018

ROLE OF PURCHASING

Facilitate a non-discriminatory, fair, open, transparent, accountable procurement practice:

- Objectivity and Integrity in the Procurement Process
- To ensure a fair, open and transparent process
- Respect for Each Other and the Environment
- Avoid Conflict of Interest
- Co-operative Purchasing where possible
- Maximum Value for Money in the use of Public Funds

Public vs. Private Sector Procurement:

- **Public:** based on legislation & case law, transparency, Equal & Fair treatment of all Vendors, taxpayer funds purchases
- **Private Sector:** Independent/self directed, closed process, negotiations, preferred suppliers, rarely challenged, corporation funds purchases

CODE OF ETHICS

Both municipalities are members of the Ontario Public Buyers Association.

<https://www.opba.ca> and we subscribe to:

- ❖ Open and Honest Dealings With Everyone Who is involved in the Purchasing Process. This includes all businesses with which these agencies contract or from which it purchases goods and services, as well as all members of our staff and of the public who utilize the services of the Purchasing Dept.
- ❖ Fair and Impartial Award Recommendations for All Contracts and Tenders. This means that we do not extend preferential treatment to any vendor, including local companies. Not only is it against the law, it is not good business practice, since it limits fair and open competition for all vendors and is therefore a detriment to obtaining the best possible value for each tax dollar. <https://www.ontario.ca/laws/statute/90d12>
- ❖ An Irreproachable Standard of Personal Integrity on the Part of All Those Designated as Purchasing Agents for these Agencies. Absolutely no gifts or favours are accepted by the purchasing agents in return for business or the consideration of business. Also, the purchasing agents of this agency do not publicly endorse one company in order to give that company an advantage over others.

PURCHASING POLICY BY-LAW

Purpose :

The policy by-law outlines the guiding principals of public procurement and the approach that the City departments will take when procuring goods, services or construction.

Quite West Purchasing By-law:

<https://www.quintewest.ca/en/your-city-hall/Purchasing.asp>

City of Belleville Purchasing By-law:

<https://bids.belleville.ca>

AUTHORITY & DOLLAR THRESHOLDS

City of Belleville	City of Quinte West
Up to \$5000. – Comparison pricing where practical	Up to \$5000. – Comparison pricing where practical
\$5,001.- \$20,000 .– Three informal, telephone or written quotes	\$5001.- \$15,000. – Three informal, telephone or written quotes
\$20,001.-\$50,000 – competitive process through Purchasing & posted on City’s bids & tenders webpage.	\$15,001. - \$40,000. – Three written quotes
+\$50,000. - Formal competitive process unless considered a single or sole source procurement and posted on City’s bids & tenders webpage.	+\$40,000. – Formal competitive process unless considered a single or sole source procurement and posted on City’s Bids & Tenders webpage.
Contract Award: +\$50,000. Council approval required.	Contract Award: As long as a project can be awarded within the approved budget limit, further Council approval is not required.

BIDSandTENDERS.ca

Digital procurement management
platform <https://bidsandtenders.ca>

Online portal that connects suppliers
to 100s of Bid Opportunities across
Canada

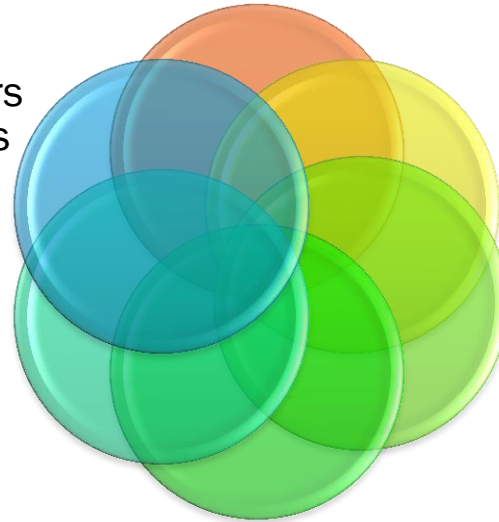
Instant access to new bid
opportunities, addendums and bid
results

A custom dashboard to
manage and track bids at a
glance

Available in the foreseeable future.....

The option to submit bids online to
ensure 100% complaint
submissions, every time

Automated email notifications including new bid postings, bid status
updates & addendum releases



NOTEWORTHY FEATURES

- ❖ Because you have categorized your area of interest/expertise when you register and set up your client profile in the bids & tenders website, you will receive an automatic email notification for each bid opportunity posted matching your criteria on the day it is available.**
- ❖ Ability to preview the bid documents prior to signing in as a “Plan Taker” or printing them off (watermarked DRAFT only).**
- ❖ Once you determine whether you/your company has the skill set and qualifications to participate in the competitive bid process, sign in as a Plan Taker and download the unmarked version of the document, specifications and drawings , no charge.**

- ❖ **Must be registered on the Bids & Tenders site in order to bid (this allows us to ensure full communication to all interested parties). Note: you can have up to 10 separate registrants per account.**
- ❖ **Notification of Addenda will be issued to registered Plan Takers Only.**
- ❖ **Access to Vendor support portal.**
- ❖ **Access to Plan Taker lists for all open bid opportunities (good for sub-trades and general contractors alike).**
- ❖ **All Registered Plan Takers receive email updates on bid status (Open/Closed/Awarded with results)**

AVOID REJECTION! ENSURE A COMPLIANT BID

The bids document will clearly identify all mandatory requirements.

To ensure fairness, bids that do not meet mandatory requirements must be disqualified, for example:

- Not attending a mandatory site visit
- Bid not submitted before the closing date and time
- Not submitting a Bid Deposit or Bonding when required
- Any other requirements that are marked as mandatory
- If you require clarification, please ask!

BID QUESTIONS AND CONCERNS

- ❖ Submit Questions in writing only prior to the deadline for questions . This date is posted on the City's bids and tenders website and is noted in the bid document.
- ❖ Complete instructions and contact names are outlined in the bid document.
- ❖ If you contact people other than those identified in the document to gain insight or favour in position, this may be considered lobbying . The integrity of the process is of utmost importance and lobbying may be grounds for rejection of further participation in the bid process.
- ❖ Questions , discrepancies, errors or omissions will only be received up to the designated deadline time in the bid document to enable the City to investigate and prepare an addendum if necessary. Questions received after this date may not be acknowledged or answered at the City's discretion.

BID DOCUMENTS - RFT v RFP

❖ Types of Contract Documents:

Request for Quotation (RFQ)

Request for Tender (RFT)

Request for Proposal (RFP)

Request for Pre-Qualification (RFPQ)

Request for Information (RFI)

❖ A Request for Tender (RFT) is used when the requirements can be precisely defined and for which a clear or single solution exists. The lowest priced qualified respondent is generally awarded the project providing it is within budget.

❖ A Request for Proposal (RFP) is issued when criteria other than price is considered in the evaluation. Price is only one component so there is a balance between getting the best overall value vs the lowest cost. This process is designed to provide a fair competitive process when we have no clear or single solution. The City relies on the expertise of the respondents. The desired outcome is specified by the municipality and vendors provide various solutions and their associated costs.

STANDARD INSURANCE REQUIREMENTS

The bid document will clearly indicate all requirements with regard to insurance.

- Commercial General Liability (CGL)
- Limits vary for each project but normally between \$2 and \$5 million
- Must name each agency as “additional insured”
- Other forms of insurance may also be required

WSIB REQUIREMENTS

Vendors who perform work on City property are required to supply proof of good standing with the Workplace Safety and Insurance Board (WSIB)

- As of January 1, 2013, the Ontario Government made WSIB coverage mandatory for most of the construction industry (Bill 119) <https://wsib.ca>;
- Contractors who have not yet registered and work without a valid clearance number face fines of up to \$100,000 upon conviction;
- Agencies who hire contractors without confirming they have a valid clearance number also face serious fines and penalties;
- Agencies may ask for exemption letters for those vendors that are not required by WSIB to carry the coverage;
- Evidence of good standing is monitored. Failure to remain in good standing will result in stoppage of work.

ACCESSIBILITY OF ONTARIANS WITH DISABILITIES ACT (AODA)

Commitment to accessibility;

New standards under the Act – the Integrated
Accessibility Standard Regulation;

Each time we purchase goods, services and facilities we
must incorporate accessibility design, criteria and
features;

Accessibility criteria used as guidelines in purchasing
decisions.

GENERAL TIPS

- ❖ Don't be late or your bid will be rejected. This is not a discretionary decision.
- ❖ Read the bid document thoroughly and follow the instructions.
- ❖ Communicate and raise issues or concerns in writing during the question period prior to closing.
- ❖ Clearly include or demonstrate that you meet the mandatory bid requirements.
- ❖ Include all of the required documents requested in the bid document (e.g. bid bond, bid deposit, etc.).
- ❖ References – if required, provide relevant comparable projects and include accurate contact information.

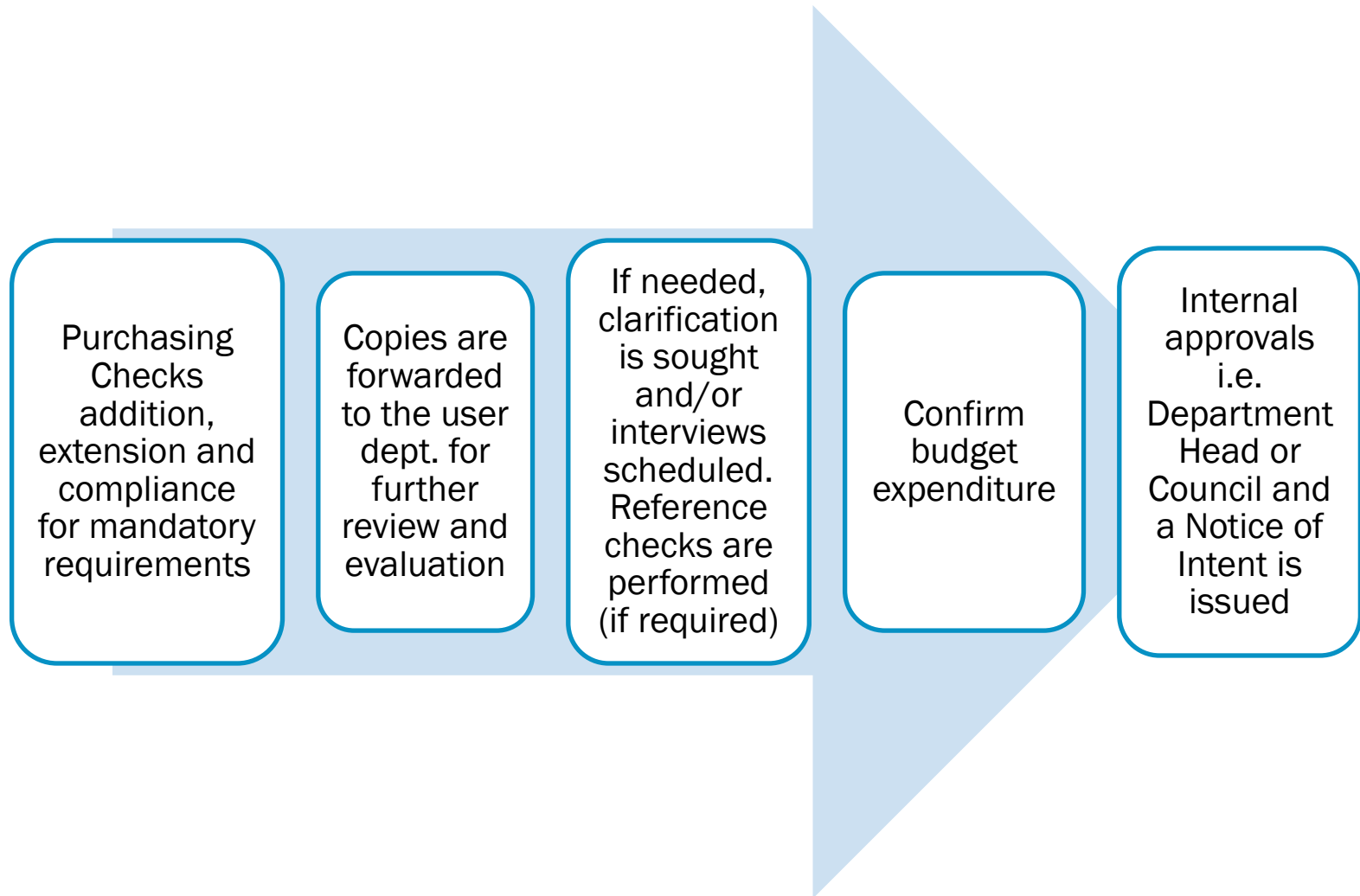
WHAT HAPPENS AFTER CLOSING

Unofficial bid results will be posted as soon as possible after closing on the City's Bid & Tenders website. This will include a list of bidders but may or may not include pricing. Tenders and Quotes will have pricing posted. RFP's will only have the names of the bidders posted as other factors are considered in the selection of the contract in addition to price.

Throughout the bidding process and pending contract award communication shall be between bidders and Purchasing only. This helps prevent a real or perceived situation that could impact the integrity of the bid process

Purchasing staff may contact bidders for clarification of bid submissions

BID EVALUATION



BID AWARD



Recommendation for award

May require Council approval

Official Award information will be posted on the City's website in accordance with the Purchasing By-law.

City issues the contract (may be in the form of a purchase order or a formal agreement or both).

In the case of a Request for Proposal, bidders may request a debriefing. More information available in the Purchasing Policy By-law.

MONITORING VENDOR PERFORMANCE

Considered
a key factor
in
successful
completion
of projects

Performance
evaluations
will take
place by the
project
manager at
the City

When
performance
incidents
are
identified,
vendors
need to
correct them
quickly

Poor
performance
costs time
and money
for all
parties and
places the
City at risk

Both parties
need to work
together for
success !

METHODS OF PAYMENT

Purchasing Cards

- ❖ Both Cities utilize Visa purchasing cards (P cards) for purchases in accordance with their purchasing policy.
- ❖ A purchasing card is a type of credit card issued at a corporate level. The cards display both the Cities name and the individual users name. Compliant charges on each card are the liability of the City.
- ❖ Each City has a variety of controls available to them including single transaction limit, monthly credit limit, and merchant code (MCC) restrictions.

Purchase Order/Invoice

- ❖ Terms are Net 30 unless otherwise agreed
- ❖ A valid purchase order must be referenced on all documentation (packing slips, invoices etc.).

Electronic Funds Transfer

- ❖ Offered by the City of Quinte West. This has potential to significantly expedite the transfer of funds from our bank to yours.
- ❖ An email detailing the transfer is sent each time.

SURPLUS GOODS

GovDeals



- www.govdeals.ca
- On line auction site used by the City to sell obsolete and surplus assets which are no longer required but still hold some value, and cannot be used by other departments.
- List everything from laptops to chainsaws to heavy equipment and vehicles.

QUESTIONS?

THANK YOU!!

June 21, 2018

The City of Belleville



The City of Quinte West

