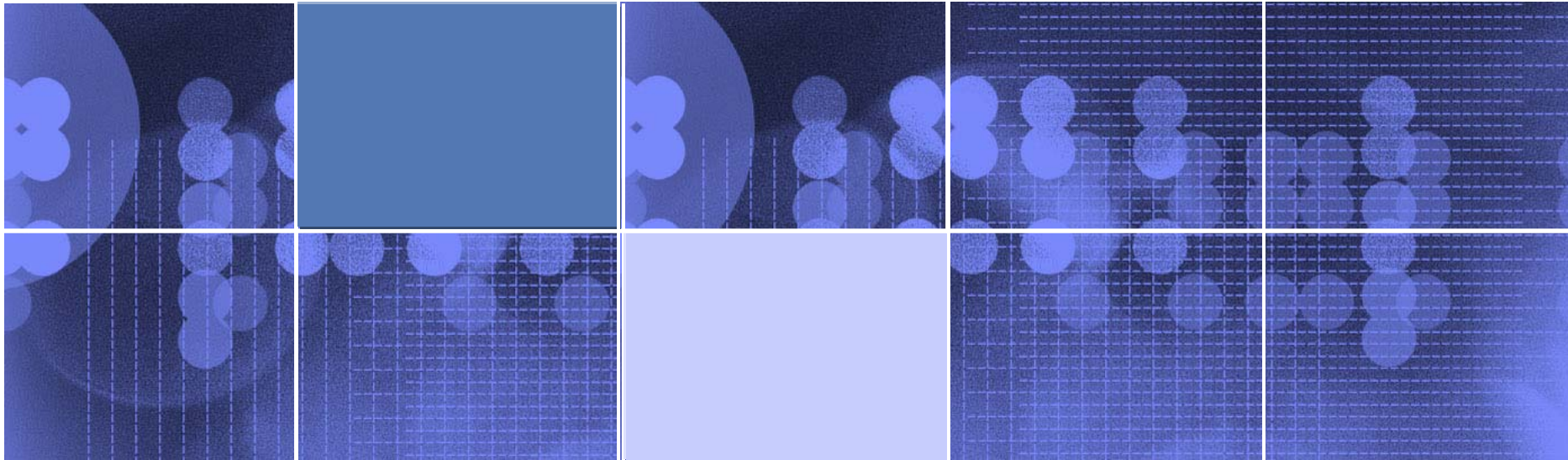


# *Preparing Your Best Bid Event*



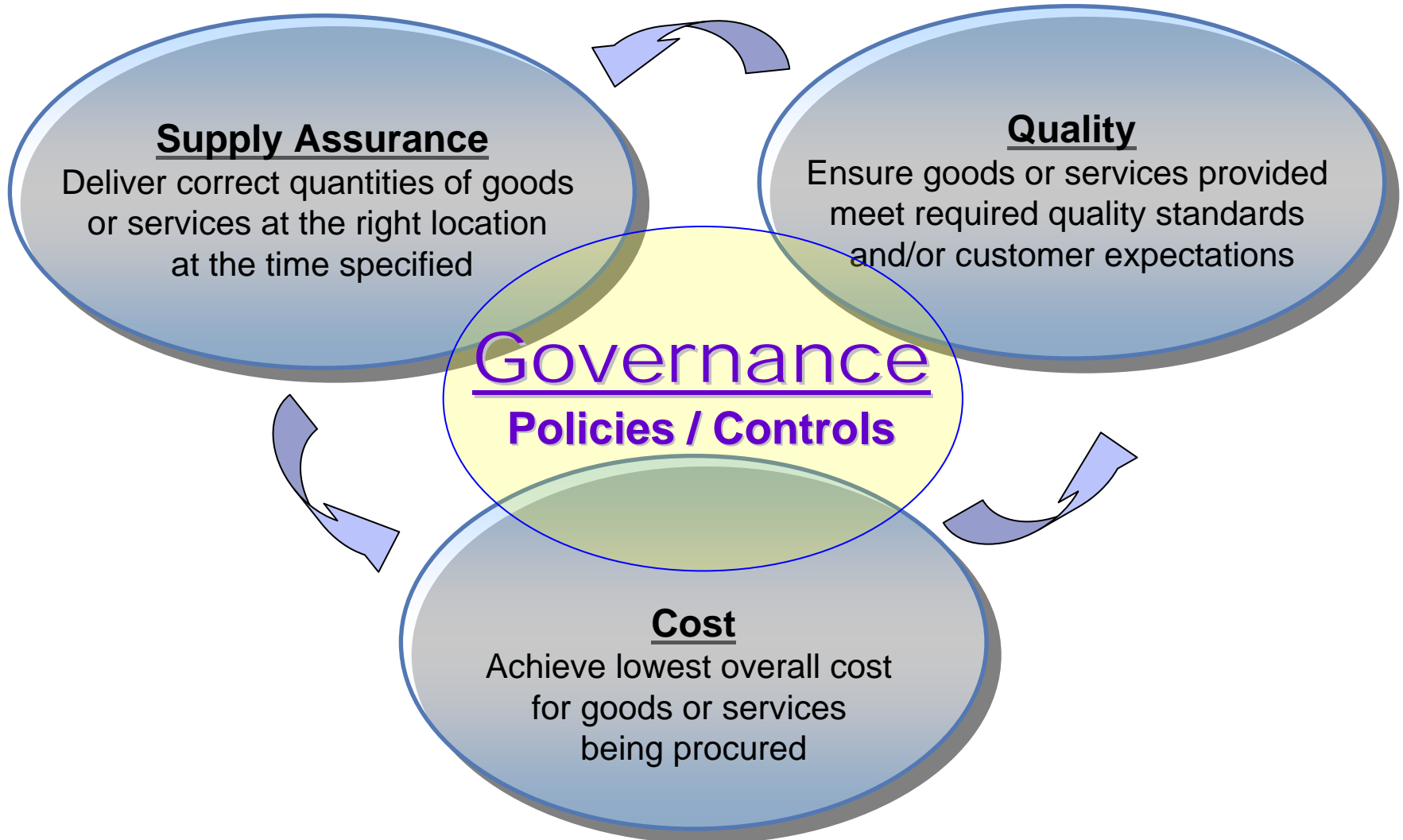
**Kevin Jones**

*April 16, 2010*



**Purchasing Mission Statement**  
**College & University Purchasing Policy**  
**College & University Purchasing Policy Statements**  
**College & University Purchasing Procedures**  
**Bidding/Quoting Process**  
**Successful Bidding Tips**  
**How to Introduce your Products & Services**  
**Questions**





# Purchasing Policy



## Introduction

Durham College and the University of Ontario Institute of Technology strives to ensure its purchasing activities are conducted in a manner that is ethical, lawful, transparent, courteous, clearly documented and fiscally responsible. Purchasing decisions shall be taken with consideration given to short-term and long-term departmental and college-university wide goals.

## Purpose

This policy has been developed to provide clear and consistent guideline to all Durham College and University of Ontario Institute of Technology employees, including contract personnel and part-time staff, all operational and ancillary units of the College and University. The sound management and control of financial expenditures in a fiscally responsible manner is vital to the sustainability and strategic growth of Durham College and the University of Ontario Institute of Technology .

# Policy Statements



1. The goal of all purchasing activities shall be to provide competitively priced, quality goods and services to College and University staff, faculty and students.
2. Purchasing activities shall be consistent with the College and University values, academic mission and strategic priorities.
3. Purchasing activities will be conducted in a manner that: fosters documented financial accountability; practices professional competence, courtesy and ethics; supports the fair and impartial awarding of contracts; ensures best overall value and; complies with municipal, provincial and federal regulations and legislation.
4. Financial thresholds, using pre-tax costs, shall be established to determine personnel who may authorize various purchasing activities. Thresholds will also be used to determine the necessity for, and degree of, competitive quotation required before acquiring goods and services.
5. Where appropriate and feasible, preferred vendors for goods and services will be identified; this shall occur through a public tendering process at intervals not exceeding three years.
6. Where possible, and without compromising overall best value, purchasing preference will be given to locally sourced goods and services.
7. Where possible, and without compromising overall best value, purchasing preference will be given to environmentally friendly goods and services.
8. Ensure all contracts executed with suppliers will be maintained by the Purchasing Department in a central file location.
9. Ensure purchasing decisions are consistent with Durham College and UOIT's values and Risk Management policies.

# Purchasing Procedures

- 1.0 Conflict of Interest with Vendor's
- 2.0 Gifts/ Donations from Vendor's
- 3.0 Business Meals and Entertainment with Vendor's
- 4.0 Methods for Purchasing
- 5.0 Expenditure Authorization
- 6.0 Engaging an External Vendor/Contractor
- 7.0 Purchase Order Requisitioning
- 8.0 Contracting with Vendors
- 9.0 Competitive Quotation /Tendering
- 10.0 Competitive Evaluation (with or without price)
- 11.0 Competitive Price Bid
- 12.0 Exceptions to Competitive Quotation/Tendering
- 13.0 Sole Source/Only Source
- 14.0 Determination of Best Value
- 15.0 Preferred Vendor Status
- 16.0 Vendor Import Compliance
- 17.0 Receiving Goods
- 18.0 Return of Goods
- 19.0 Broader Public Sector (BPS) Procurement Policies and Procedures
- 20.0 Appendix 1 Waiver of the Competitive Purchase Process

# Bidding Process

- Expenditures valued at \$3,000 or less for the College or \$5000 or less for the University do not require the requisitioning department to provide any quotations to the Purchasing Department. It is suggested that the requisitioning department still obtain two quotations to ensure best value is obtained.
- Unless a contract has been previously executed with a vendor, expenditures valued between \$3,000 and \$25,000 for the College and \$5000 and \$25000 for the University requires the requisitioning department to provide at least two written quotes to the Purchasing Department with the purchase requisition.
- Unless a contract has been previously executed with a vendor, expenditures valued between \$25,000 and \$100,000 require a minimum of three written quotations be provided to the Purchasing Department with the requisition from distinct vendors, a tender or RFP to be performed depending on the complexity of the requirements and the length of time the vendor will be utilized. These opportunities may also be posted to [www.merx.com](http://www.merx.com) depending on the nature of the expenditure.
- Expenditures valued at \$100,000 or greater requires public tendering and will be posted to [www.merx.com](http://www.merx.com)

# Successful Bid Tips

- Submit your bid on time
  - Late bids are not accepted ensure - date, time and location for delivery
- Make sure that your bid document is compliant and addresses all mandatory criteria
  - This is a show stopper - mandatory means mandatory
- Fully address all rated requirements
  - The quality of the response will determine your standing in the competition
- Follow the requested format
  - Bidding with a different format will make it more difficult for evaluators
  - There is a risk the evaluator will not find pertinent information if it is not where they expect to find it
- Accepting the stated terms and conditions
  - Acceptance of the terms and conditions detailed in the tender is required
- Check your pricing
  - Unit price prevails where there is an error

# Successful Bid Tips



- Never make assumptions – if you have a question, seek clarification
  - The best advice is to make no assumptions
  - If you have a question - ask
- Provide detailed information
  - We can only evaluate what has been submitted
- Review the evaluation criteria and selection method
  - Look to the solicitation document to determine how your bid will be evaluated
- Know your client – have market presence
  - Meet with clients on a regular basis
  - Keep your client and department contact information current
  - Check [www.merx.com](http://www.merx.com) on a regular basis for sourcing opportunities

The most common reasons for not being successful, apart from price, include: an ineligible or incomplete document, a lack of evidence of ability to perform the service, added value, a poor track record and, finally, minimum standards are not met.

# How to Introduce your Products & Services

Check [www.merx.com](http://www.merx.com) for potential bidding opportunities

Review Durham College website directory for key contacts by department.

<http://www.durhamcollege.ca/directory/>

Review UOIT website directory for key contacts by department.

<http://www.uoit.ca/directory/>

Contact Information: Procurement Manager

Kevin Jones – 905-721-2000 Ext 2251

Email – [kevin.jones@dc-uoit.ca](mailto:kevin.jones@dc-uoit.ca)



# Questions

Thank you for your time today !!