

GENERAL MANUAL POLICY

APPROVED BY: 
Executive Director
Finance

CATEGORY:

TOPIC: Tendering Policy

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POLICY

Community Living Thunder Bay shall attempt, in all dealings, to obtain the best quality for the least cost; consistent with the maintenance of a satisfactory standard. Tendering of goods or services over a certain value shall be done to ensure that the best possible price has been obtained. The purchase of approved goods or services whose value exceeds an amount approved by the Board of Directors shall occur only after three competitive bids have been received. This applies to goods or services, which individually or in a total group exceed the specific value.

CLTB adopts the:

Ontario Broader Public Sector (BPS) Supply Chain Code of Ethics

Goal: To ensure an ethical, professional and accountable BPS supply chain.

I. Personal Integrity and Professionalism

Individuals involved with Supply Chain Activities must act, and be seen to act, with integrity and professionalism. Honesty, care and due diligence must be integral to all Supply Chain Activities within and between BPS organizations, suppliers and other stakeholders. Respect must be demonstrated for each other and for the environment. Confidential information must be safeguarded. Participants must not engage in any activity that may create, or appear to create, a conflict of interest, such as accepting gifts or favours, providing preferential treatment, or publicly endorsing suppliers or products.

II. Accountability and Transparency

Supply Chain Activities must be open and accountable. In particular, contracting and purchasing activities must be fair, transparent and conducted with a view to obtaining the best value for public money. All participants must ensure that public sector resources are used in a responsible, efficient and effective manner.

III. Compliance and Continuous Improvement

Individuals involved with purchasing or other Supply Chain Activities must comply with this Code of Ethics and the laws of Canada and Ontario. Individuals should continuously work to improve supply chain policies and procedures, to improve their supply chain knowledge and skill levels, and to share leading practices.

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PROCEDURE

1. Three competitive **written quotes** must be obtained for purchases of goods, non-consulting services and construction whose value exceeds **ten thousand dollars (\$10,000.00)** and for ALL consulting services. Purchasing Agent shall attach quotes, approvals and get signatures. Whenever the good or service is valued at \$100,000 or more during the life of the contract and Open Competitive Tender or RFP process must be followed.
2. The Purchasing Agent shall consult with the Director of Finance if it is not possible to obtain three competitive quotes.
3. **For instances where there is a preferred supplier for goods or services with a contract over \$10,000, a purchasing waiver , explaining the rational must be signed by the appropriate approval level (purchasing manager \$10,000, senior team \$25,000 and Executive Director over \$25,000). See attached form**
4. The Director of Finance may recommend a purchase if it was not possible to obtain three quotes; however, the form must be filled out and attached to invoices. With approval of the Executive Director, year-end purchases made when we receive funds with minimal notice can be exempt from the tendering policy, in which case experience with vendor of record will be a deciding factor.
5. The Purchasing Agent shall ensure that all potential suppliers are bidding on the same specifications.
6. The Purchasing Agent shall prepare a listing of all bids, identifying the name of the bidder, the conditions of the bid, and the quoted price and make a recommendation for the approval of the Director of Finance if over \$10,000.
7. The Director of Finance shall review the information and make a recommendation to the Executive Director regarding the most appropriate bid, if over \$25,000.
8. The Purchasing Agent shall maintain a file on all documentation relating to the purchase, including specifications, bids, preapprovals, waivers, if any and the unsuccessful bids.
9. The Purchasing Agent shall periodically obtain quotes on items whose value does not exceed \$3,000 per order, but the amount ordered in a year will exceed the \$10,000 written quotation amount. Professional services will be tendered every three years or when a contract period is over.
10. The Purchasing Agent shall obtain prices from at least three suppliers on all routine items whose pricing nature could be considered volatile, i.e. building materials, copy paper, etc.

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Competitive Purchasing Waiver Form

(used for when cannot get 3 quotes or when there is a business case to use a preferred supplier)

Preferred Supplier: _____

Description of goods or services contract:

Policy:

You must obtain three (3) quotes, from different vendors; for all purchases over \$10,000.00 with consideration to the company's reputation, reliability, punctuality, advertising and commitment to quality & service etc. Over \$100,000 must have an open competitive procurement process (tender/RFP).

Business Case (Reasons) for not getting Quotations:

Approvals to use Preferred Supplier

Team Leader/Purchasing Manager

Date

Director

Date

Executive Director

Date