

VILLAGE OF BEISEKER



Title	PURCHASING POLICY	POLICY NO: J-19
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Legislation Reference	
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Purpose:
To establish a policy that defines the parameters for purchasing, authority, tenders, etc.

Policy Statement and Guidelines:

General

1. The CAO has the authority to approve any budgeted item and may request approval by a department head as determined by the CAO.
2. Council recognizes that on occasion, the budget for any single account may be exceeded. If an unbudgeted expense is for an emergency (as determined by the CAO or Council) or if the expense is required in order to ensure the proper operation of the Village, the CAO can approve the expense, but will make every attempt to ensure Council is promptly advised.
3. The CAO will report twice per year on any account that has exceeded the operating budget by \$500.00 with an explanation of the cost. Since the annual operating budget is typically passed in June of every year, reporting on over expenditures will occur in September and December.
4. The following applies to Capital Budget purchases. It also applies to Operating Budget purposes, but only when amounts have not been previously approved by Council and/or the purchase is not of an emergent nature.

Capital Projects between \$10,000.00 and \$50,000.00 (also pertains to purchases/contracts for the Operating Budget)

Purpose

To ensure contractors, firms and companies receive a fair and equal opportunity to quote on Municipal projects. This policy will ensure that all submissions are received in similar formats to better enable Council to make an informed decision.

Policy Details

1. When the Village of Beiseker has a project estimated over \$10,000.00 and up to \$50,000.00, the project does not have to be tendered. Best practice would be an estimate received from a minimum of 2 contractors.
2. Where less than 2 contractors are available to meet the requirements, the rules of the tendering process will be followed as close as possible.

3. Once the time frame for submissions is closed, the CAO will open all submissions in the presence of at least one other person – administrative staff, public works or a member of Council. All present will initial the submission documents to signify that the documents were reviewed in their presence.
4. A decision will be made by Council based on the information provided. If the purchase is of a timely nature, this can be done by email. Criteria that may be used in the selection process include:
 - a) the submitted price, completion schedules, available equipment and resources, the ability of the bidder to meet the requirement of the project, local preference and any other criteria related to the project.
 - b) the lowest or any quote may not necessarily be accepted.
 - c) the municipality reserves the right to reject any and all quotes at its sole discretion
 - d) Any questions regarding the submitted quotes should be provided to the CAO who will follow up with the submitting party, however, the bid submissions should be considered at face value as much as possible in order to ensure fair valuation of all submissions.

Capital Projects over \$50,000.00 (also pertains to purchases/contracts for the Operating Budget)

Purpose

To ensure contractors, firms and companies receive a fair and equal opportunity to bid on municipal projects. The policy will ensure that all tenders are received in similar formats to better enable Council to make an informed decision.

Policy Details

1. When the Village of Beiseker has a project or contractual requirement for services over \$50,000.00, the project must be tendered to a minimum of three contractors. If more contractors are available for the services/purchase, consideration should be given to as many as are reasonable for the project.
2. The tendering process will be advertised up to two consecutive weeks in locally circulating newspapers, on social media and the Village website and any other means that is practical for the project. The advertisement will provide:
 - a) a brief description of the project contemplated.
 - b) the place where a person may obtain further information and tender documents
 - c) any conditions for obtaining the tender documents
 - d) the place where the tenders are to be sent
 - e) the date and time deadline for submitting tenders
 - f) the time and place of the opening of tenders in the event of a public opening.
3. The Administration Office will prepare a formal Request for Quote or Proposal that should include:
 - a) a specific outline of the project to be completed or services to be provided with as much detail as possible.
 - b) the requirement that those bidding on the project provide a detailed written submission that includes resources and equipment to be used and how the project requirements will be met. This may include timelines, a brief CV (Curriculum Vitae) of key personnel dedicated to the project, references, detailed equipment lists and/or any other information requested by the Village.
 - c) the criteria that will be used in the evaluation of the bids
 - d) the methods of weighting and evaluating the submitted bids

- e) that the cost of preparing and submitting the bid should not be included in the bid price
5. The Request for Quote or Proposal shall contain a privilege clause in a format similar to the following:
“The Village of Beiseker reserves the right to accept or reject any or all tenders and to waive irregularities and informalities at its discretion. The Village of Beiseker reserves the right to accept a tender other than the lowest tender without stating reasons. By the act of submitting its bid, the Bidder waives the right to contest in any legal proceeding or action the right of the Village of Beiseker to award the work to whomever it chooses in its sole and unfettered discretion, and for whatever reasons the Village of Beiseker deems appropriate. Without limiting the generality of the foregoing, the Village of Beiseker may consider any other factor besides price and capability to perform the work that it deems in its sole discretion to be relevant to its decision, including but not limited to the following: (list of criteria).
 6. If required, the Request for Quote or Proposal may include the financial format in which tender documents are to be submitted.
 7. As the norm, Tender Documents are to be received at the Village of Beiseker Office in a sealed envelope and will remain sealed until the end of the period set out for receipt of the tender documents. In specific cases or urgency, or short time frame, as determined by the CAO, the tenders may be received by email or fax.
 8. Once the period for submissions of tenders is closed, the CAO will open all tenders in the presence of at least one other person, administrative staff, public works or a member of Council. All present will initial the tender documents to signify that the documents were reviewed in their presence.
 9. The CAO will present information from the Tender Documents to Council in a spreadsheet format which will provide the following information:
 - a) name of the firm submitting the tender
 - b) itemized details which are required by Council in order to make the decision
 - c) financial information based on the format approved
 - d) and may include the recommendation from the CAO

The original tender documents will be made available to Council should Council feel that they need further information or if this is deemed necessary by the CAO.
 10. A decision by Council will be made on the information provided. Evaluation of the bids may consider the submitted price, completion schedules, reference checks, available equipment, preference to local, the overall ability of the bidder to meet the specific requirements of the project and any other criteria relative to the project.
 11. Any questions regarding the submitted quotes should be provided to the CAO who will follow up with the submitting party, however, the bid submissions should be considered at face value as much as possible in order to ensure fair valuation of all submissions.

12. When only one supplier is available to meet the requirements, the rules of the tendering policy should be followed as close as possible.

	DATE	RESOLUTION NUMBER
Approved	November 23, 1998	98-95
Amended	Sep 11, 2023	2023-178
Amended		
Amended		
Rescinded		



Chief Administrative Officer



Chief Elected Official