



# GUIDE TO COMPETITIVE BIDDING

## PROCUREMENT SERVICES



# Objective

UFV acquires goods and services through open, fair, and transparent competitive bidding processes to ensure best value. Public competitive bidding is required for purchases exceeding \$75,000 CAD for goods and services and \$200,000 CAD for construction. Procurement Services collaborates with clients to develop competitive bid documents that accurately capture UFV's requirements. These documents are publicly posted on the BC Bid and Euna platforms and, upon closing, guide the evaluation of submissions to identify the appropriate supplier. The overall process, which typically spans 12 to 16 weeks, is designed to procure goods, services, or construction that meet UFV's specific needs. This approach ensures the best value while upholding UFV's Procurement Policy and meeting obligations under provincial and federal trade agreements and Canadian public procurement law.

## Roles and Responsibilities

### Project Team

The project team includes members from UFV departments and Procurement Services who work together to determine the detailed requirements for the project

### 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 various members from the project team. Other participants may include specialists from ITS, facilities, etc., as well external subject matter experts who may be engaged to advise the project team

### Procurement

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

### Legal Expert

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

### Types of Bid Documents

<b>RFP</b>	Request for proposal
<b>RFQ</b>	Request for quotations
<b>RFSO</b>	Request for standing offer
<b>RFPQ</b>	Request for pre-qualification
<b>RFI</b>	Request for information
<b>NOI</b>	Notice of intent

# Stage 1 - Gathering Information & Document Development

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## Initiating

The client project lead contacts Procurement Services as early in the project as possible to ensure sufficient time for planning and conducting the competitive bid process

### Responsibilities

#### **Client project lead**

- Needs recognition

#### **Timeline**

- Client dependent

#### **Procurement**

- Research existing UFV, BCNET and BC government agreements, various trade agreements and policies
- Run category reports

#### **Timeline**

- 2 business days

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## Preliminary Meeting

The project team and Procurement Services will meet to discuss the project requirements and the procurement strategy

### Responsibilities

#### **Project team**

Competitive bid kickoff meeting to review:

- Project requirements
- Procurement strategy
- Competitive bid process and documents
- Roles and responsibilities

#### **Timeline**

- 2 hours

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## Developing Requirements

The project team, with assistance from Procurement Services, will complete the project requirements and the competitive bid template documents

### Responsibilities

#### **Procurement**

- Provide competitive bid documents

#### **Timeline**

- 1 business day

#### **Client project lead**

- Complete the scope requirements and the criteria sections of the competitive bid document

#### **Timeline**

- Client dependent (NOTE: bottleneck point)

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## Finalizing the Bid

Upon receiving the draft competitive bid documents, Procurement Services will finalize the documents and build the competition

### Responsibilities

#### **Procurement**

- Finalize the competitive bid document and build the competition in Euna

#### **Timeline**

- 5 business days

#### **Project team**

- Review meeting to finalize documents and receive posting approval

#### **Timeline**

- 2 hours

## Stage 2 - Selecting a Supplier

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### **Posting & Closing**

Procurement Services will post the competitive bid documents publicly to offer all suppliers an open, fair and transparent opportunity to submit a proposal

#### **Responsibilities**

##### **Procurement**

- Euna and BC Bid posting
- Facilitate and post addendums

##### **Timeline**

- Minimum posting period is 25 calendar days

##### **Project team**

- Participate in site tours (if applicable)
- Provide answers to any questions

##### **Timeline**

- 1 hour during bid posting

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### **Evaluating**

Procurement Services will validate the submissions, and the evaluation committee will rate them according to criteria established in the competitive bid documents

#### **Responsibilities**

##### **Procurement**

- Review mandatories and pricing
- Facilitate consensus meeting

##### **Timeline**

- 2 business days

##### **Evaluation committee**

- Score submissions

##### **Timeline**

- Client dependent (NOTE: bottleneck point)
- Attend consensus meeting

##### **Timeline**

- 1 business day

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### **Negotiating**

In consultation with the project team, Procurement Services may negotiate with the selected supplier(s) to further meet the project needs

#### **Responsibilities**

##### **Procurement**

- Lead price and business term negotiations

##### **Project team**

- Lead deliverable negotiations

##### **Legal Counsel**

- Lead the legal negotiations

##### **Timeline**

- 30 business days

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### **Contract Award**

In consultation with the project team, Procurement Services and Legal Counsel will draft the contract and award the contract(s) to the selected supplier(s)

#### **Responsibilities**

##### **Client project lead**

- Complete purchase requisition (PR)

##### **Procurement and Legal Counsel (if applicable)**

- Finalize contract(s)
- Complete purchase order (PO)
- Issue notice of contract award

##### **Project Team**

- Review debriefing script
- Attend debriefing meeting

##### **Timeline**

- 30 business days

# Competitive Bid Checklist

Below is a practical and comprehensive competitive bid checklist for Procurement Services use. It is in alignment with trade agreements, fairness law and audit expectations.

## Stage I: Gathering Information and Document Development

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### 1. Initiating

- Confirm business needs
- Validate budget approval
- Check if there is an existing contract, standing offer, or consortium agreement (BCNET, BC government)
- Determine trade agreement applicability
- Run category reports

### 2. Preliminary Meeting

- Discuss scope and requirements
- Develop procurement and evaluation strategy:
  - RFP (best value)
  - RFPQ (roster list)
  - RFQ (price-based)
  - RFT (spec-driven tender)
  - Invitational (if allowed)
- Document procurement rationale
- Identify risk level (legal, financial, reputational)

### 3. Document Development

- Clients draft competitive bid documents:
  - Purpose
  - Scope and requirements
  - Response criteria (mandatory vs rated criteria)
  - Scoring matrix
- Define minimum posting period (normally 25 to 40 business days)
- Establish an evaluation committee
- Engage key areas (ITS, Legal Counsel, Privacy, Facilities, end-user)

# Competitive Bid Checklist Cont.

## 4. Finalizing the Bid

- Finalize the competitive bid documents
- Build the competition in Euna
- Client final review and approval
- Supply Chain Director review and approval

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## Stage II: Selecting a Supplier

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## 5. Posting and Closing

- Post the competition on approved public platform (BC Bid and Euna)
- Site visit (if applicable)
- Accept questions until deadline
- Issue written addenda
- Extend closing date if scope changes

## 6. Evaluating

- Check:
  - Mandatory requirements
  - Bid form
  - Signatures
  - Pricing completion
- Disqualify non-compliant bids
- Document all decisions
- Independent scoring by the evaluation committee
- Price evaluation by Procurement Services
- Consensus meeting
- Record justification notes
- Reference checks
- HEVCAT and PIA review (if applicable)

# Competitive Bid Checklist Cont.

## 7. Negotiating

- Procurement Services to negotiate price and business terms
- Client negotiates scope, requirements and deliverables
- Legal Counsel negotiates legal terms

## 8. Contract Award

- Complete purchase requisition (PR)
- Contract signed
- Complete purchase order (PO)
- Issue notice of award on Euna
- Evaluation report downloaded from Euna
- Debriefings

## 9. Audit and File Completion

- Full bid file retained:
  - Solicitation
  - Addenda
  - Submissions
  - Scoresheets
  - Approvals
  - Award letters
- File retention (generally 7+ years)

# Reference Documents

- [New West Partnership Agreement](#) (Governments of BC, Alberta and Saskatchewan)
- [Canadian Free Trade Agreement](#) (all provinces)
- [Canada-European Union Comprehensive Economic and Trade Agreement](#) (Canada and Europe)
- UFV Purchasing and Competitive Bidding Policy (internal policy)

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 for all of your procurement needs. Please contact us by email at [procurement@ufv.ca](mailto:procurement@ufv.ca)