



**THE PRIMATE'S WORLD RELIEF AND DEVELOPMENT FUND**

**PROCUREMENT  
GUIDELINES FOR PWRDF  
PARTNERS**

**PWRDF FUNDED PROJECTS**

## **1. Purpose**

The purpose of these guidelines is to ensure that goods and services purchased for the performance of a PWRDF grant are obtained in a cost-effective manner and in compliance with the **Canada Revenue Agency (CRA)** dispositions.

## **2. Scope**

These guidelines apply to all PWRDF funded projects/programs and any designees (“buyer”) authorized to initiate purchases on behalf of project funded with PWRDF monies.

## **3. Responsibility**

The Project Coordinator or Program Director of PWRDF Partner organizations is responsible for determining whether a purchase is allowable under the terms of the PWRDF grant and will ensure purchases are in accordance with these guidelines. Where applicable the Partner organization Procurement Officer will provide decision support upon request and the Partner Project/Program Coordinator or Program Director will serve as the final repository for purchase transactions.

## **4. Code of Conduct**

As representatives of Partner organizations, all employees are expected to conduct themselves in a professional and ethical manner, maintaining high standards of integrity and the use of good judgment. Employees are expected to be principled in their business interactions and act in good faith with individuals both inside and outside the Agency community.

The Code of Conduct shall govern the performance, behavior and actions of the Organization, including Board members, employees, directors, volunteers, or agents who are engaged in any aspect of procurement, including – but not limited to – purchasing goods and services; awarding contracts and grants; or the administration and supervision of contracts.

1. No employee, officer, director, volunteer or agent of the Organization shall participate in the selection, award or administration of a bid or contract supported by PWRDF funds if a conflict of interest is real or apparent to a reasonable person.

## **5. Overview**

To promote compliance with PWRDF Guidelines, the Partner organizations should require buyers to perform some measure of cost/price analysis when making purchases under PWRDF grants.

Buyers shall avoid purchasing unnecessary items. All vendor bids and quotations must be evaluated on the basis of product quality, technical compliance with specifications, total cost, and the vendor’s acceptance of the Organizations’ terms and conditions.

The vendor selection process for goods and services valued at less than \$4,000 up to \$9,000 need not be documented and stored as part of the transaction record.

The vendor selection for process for goods and services in excess of \$10,000 and up require three competitive **written quotes** must be obtained

The vendor selection for process for goods and services in excess of \$20, 000 requires a Request for Proposal (RFP) be prepared and 3 written competitive bids obtained.

## **6. Vendor Selection and Bidding Requirements**

Buyers of PWRDF Partner organizations shall consider the following before making a vendor selection:

- Does the vendor provide the best mix of quality, service and price for the specified need? PWRDF requires that the lowest price have priority, unless quality, service or delivery time takes priority as to need.
- Does the vendor qualify as a small, disadvantaged, minority or women-owned business? Qualifying vendors should be given preference to the extent practical and economically feasible.
- Does the vendor supply products and services that conserve natural resources, are energy efficient and protect the environment? Vendors fulfilling these requirements should be given preference, to the extent practical and economically feasible, for such products.

## **7. Obtaining Competitive Bids**

Solicitations for goods and services shall provide the following:

- A clear and accurate description of the technical requirements for the material, product, or service desired. The description shall not be designed to limit competitive solicitation from multiple vendors.
- Requirements that the bidder must fulfill and all other factors to be used in evaluating bids and proposals.
- A description of the technical requirements in terms of functions to be performed or performance required, including the range of acceptable characteristics or minimum acceptable standards.
- The specific features of “brand name or equal” descriptions that bidders are required to meet.
- To the extent practical, that products and service be dimensioned in the metric system of measurement.
- Preference, to the extent practical and economically feasible, for products and services that conserve natural resources and protect the environment and are energy efficient.
- Positive efforts shall be made to utilize small-business, minority-owned firms and women’s business enterprises, whenever possible.

## **8. Non-Competitive Vendor Selection**

Occasionally, a buyer is unable or chooses not to competitively bid the requirements. These situations are characterized as sole or single source transactions.

**Sole Source:**

No other vendor capable of fully meeting the requirements exists.

**Single Source:**

Alternative vendors exist in the competitive market, but the buyer chooses to solicit a bid from only one particular vendor because of technical requirements (precision, reliability) or past performance by other vendors (poor service, availability of parts). Buyers must fill out a **Sole Source Selection Form** and write a narrative justification for the non-competitive procurement. Additional information for justifying a sole or single source procurement should be presented to PWRDF.

**9. Exceptions**

The Project Coordinator or Program Director of PWRDF Partners organizations must approve any exceptions to these guidelines by written notice.

**Sole Source Justification Guidelines**

*This checklist is provided as a guideline to be used when writing your justification for a sole source procurement.*

All documentation should be written clearly so that anyone reading it will understand the reason for the sole source procurement.

At a minimum, each justification should contain sufficient facts and rationale to justify the use of the specific reason chosen including:

- identification of the reason chosen that permits for other than full and open
- competition, and
- a background statement that provides information that would assist the reader
- in understanding the history (e.g., funding source, constraints, etc.) of the
- procurement, and
- a description of the supplies or services required to meet the contract's or
- XYZ's needs, and a demonstration that the proposed vendor/subcontractor's
- unique qualifications or the nature of the acquisition requires use of the reason
- chosen and essential to the requirements, and
- a description of efforts made to ensure that offers were solicited from as many
- potential sources as is practicable, and
- a determination that the pricing/costs are fair and reasonable, and
- a description of the market research conducted and the results or a statement
- of the reason market research was not conducted, and
- any other facts supporting the use of a sole source procurement, and
- a listing of the sources, if any, that expressed in writing an interest in the
- acquisition.

## Procurement Procedures

All correspondence (e-mails etc.) with vendors/subcontractors must be a part of, and included in, the Grant file.

### **Documentation Requirements for all procurements**

Buyers shall solicit competitive bids to the maximum extent practicable at the discretion of the Project Coordinator or Program Director of PWRDF Partner organizations.

Documentation is not required.

Procurements  $\geq$  \$4,000: and  $\leq$  \$9,000: Quotations & bids may be requested and received orally. A price analysis must be performed and documented

Procurement  $\geq$  \$20,000: Quotations/proposals must be requested in writing via a formal Request for Quote (RFQ) or Request for Proposal (RFP) or equivalent that clearly set forth all requirements to be evaluated. (A description of the essential elements of an RFQ or RFP are required. A price, cost, or proposal analysis must be completed.

### **Requests for Quotes (RFQs) and Requests for Proposals (RFPs)**

RFQs are used for non-complex procurements (e.g., hourly rate consulting agreements, and procurements for materials) while RFPs are typically used for soliciting proposals for negotiated, complex contracts. The RFQ or RFP is prepared by the Project Coordinator or Program Director of PWRDF Partner organizations and should include:

- purpose
- general information, including any deadlines
- statement of work, specifications, requirements, milestones and deliverables
- bid/proposal preparation and submission instructions
- evaluation criteria
- award notification
- instructions for budget and estimated pricing
- any special terms and conditions
- required vendor certifications

End.