



MANUAL

OF

PURCHASING PROTOCOL AND PROCEDURES

Original passed by Motion of the Executive Committee
February 19, 1999
Updated April 2000
Updated May 2002

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1.1 EXECUTIVE SUMMARY

This Manual of Protocol and Procedures was originally proposed by the Purchasing and Operations Committee, and adopted by motion at the Regular Meeting of the CKLAG Executive Committee on February 19, 1999.

The Committee identified that a clear and concise procedures manual, which could be used as a handbook for the operation of the CKLAG Co-operative, was necessary for the following reasons:

- Need for consistency of operation
- Need to provide direction for new representatives to the Committee
- Need to ensure that a consistent formal purchasing policy is employed for all co-operative purchasing ventures. The effective use of this purchasing policy, by any organization, which prepares a request for tender or quotation, will minimize any risk of liability of any CKLAG member because of the integrity of the purchasing process used.

The main components of the policy include:

- A given commitment from each participating organization for the purchase of a given commodity or service.
- The correct notice of the commodities to be purchased through the appropriate advertising.
- Policies on the appropriate issuance, receipt, opening and analysis of a request for pricing.
- Policy on the award of any contract.

1.2 MEMBERSHIP

Chatham-Kent Health Alliance
City of Sarnia
County of Lambton
Lambton College
Lambton Hospitals Group
Lambton Kent District School Board
Municipality of Chatham-Kent
Ridgetown College – University of Guelph
St. Clair Catholic District School Board
St. Clair College (Thames Campus)

1.3 ASSOCIATE MEMBERS

Chatham-Kent Integrated Children's Services
Sarnia-Lambton Children's Aid Society
St. Clair Parkway Commission
St. Clair Township

2.0 COMMITMENT BY PARTICIPANTS

2.1 COMMITMENT POLICY

Upon deciding to obtain tenders or quotations for a commodity or service, all members shall be polled as to whether or not they wish to participate in the request for pricing through the Form of Intent to Participate.

All parties agreeing to participate shall be required to sign a Form of Commitment binding their organization to the request for pricing process and any subsequent recommendations. Those parties, who for legitimate reasons are unable to participate, will complete the form, stating the reasons.

In the interest of ensuring the integrity of the process, and prevent any unnecessary legal challenge, no party to the form of commitment will be allowed to withdraw during or after the opening of the proposals.

As pricing from vendors will normally be discounted because of the volume accumulated by the participating members, withdrawal of a signatory to the form of commitment will only be allowed with the expressed consent of the successful bidder. Any withdrawal shall also be subject to the approval of the other signatories and confirmation that the prices quoted not be subject to change as a result of the withdrawal.

2.2 FORM OF INTENT TO PARTICIPATE

Attached as Appendix A. To be completed by all CKLAG member organizations, to indicate interest in participating, or non-interest.

2.3 FORM OF COMMITMENT TO PARTICIPATE

Attached as Appendix B. To be completed by all CKLAG member organizations, to indicate commitment to participate or non-participation.

2.4 COMMITMENT PROCESS FLOW CHART Attached as Appendix C

3.0 COMMUNICATION

3.1 ADVERTISING POLICY

The Purchasing and Operations Committee will place advertisements in the daily major newspapers in the circulation areas of Chatham-Kent and Lambton County, inviting companies to submit either pre-qualification packages or requests for proposals specific to the needs of the Committee. The advertisement(s) will be listed under the “Legal” heading of the classified section of the papers, shall be at least two columns wide, and will be placed in the papers over a weekend.

If the Committee requires services or commodities whose costs are expected to exceed \$100,000.00 by any participating member, the Committee will advertise in a national paper as well as on the MERX internet service.

Although the Committee will make every effort to utilize local suppliers through local advertisement it must be recognized that it remains the exclusive right of the committee to expand its advertising search as it so deems. This may include advertising through the internet on the Ontario Public Buyers Association information web site or expanding the advertising to a larger geographical area.

The advertisement shall be designed by the sub-committee responsible for the service or commodity, approved by the Committee as a whole, and forwarded to the Executive Co-ordinator for placement. Payment for all advertising is the responsibility of the CKLAG Treasurer and shall come from the “expenses” component of the CKLAG budget.

3.2 MEDIA OFFICER

Annually, the committee shall elect a media officer whose responsibilities include assisting in the development and review of the advertisement as well as ensuring that the terms of the advertising policy are followed.

4.0 PRE-QUALIFICATION PROCESS

4.1 PURPOSE

The pre-qualification system is designed to produce a perpetually updated list of contractors and suppliers who can consistently meet established standards in order to maximize member organization resources.

4.2 PROCESS

An invitation for pre-qualification will be advertised once per year in major newspapers in Sarnia/Lambton and the Municipality of Chatham-Kent. The Operations/Purchasing Committee Chair will assume responsibility for disbursement of the necessary forms and for the collection of the submissions for review by the Committee.

- Each submission will be evaluated, rated, and either denied pre-qualification or approved for one of several levels.
- Any supplier may submit for pre-qualification at anytime during the year. Thirty days before the submission of the tender, no further submissions will be accepted.
- After FIVE (5) years from pre-qualification, each supplier will be asked to resubmit for pre-qualification in order to ensure all information is current.
- Suppliers may be dropped from the approval pre-qualification list if:

- a) the pre-qualification date is more than six years past;
- b) upon consensus of the member organizations, a vendor/supplier may be removed from the list. A previous satisfactory supplier for CKLAG can be included at the discretion of the Committee.
- c) Thirty days before the submission of the tender, no further submissions will be accepted.

4.3 TASK ASSIGNMENTS

The member organizations will share the pre-qualification tasks as follows:

<u>Task</u>	<u>Assignment</u>
Design and place ad	Committee Chair
Receive enquiries & submissions	Media Officer
Evaluate submissions	Sub-Committee
Request additional data	Sub-Committee
Check references	Sub-Committee
Design database (form letters/addresses/merging)	Committee member (G. Leenhouts)
Approval for list	Committee
Maintain database	Committee Member (fwd.to G.Leenhouts))
Maintain hard files of submissions	Committee Member (G. Leenhouts)
Maintain complaint file	Committee (Executive Coordinator)
Issue letters for approval/denial (form letter)	Sub-Committee
Issue letters for pre-qualification	Sub-Committee
Cull list	Sub-Committee

4.4 INVITATION FOR PRE-QUALIFICATION OF SUPPLIERS AND CONTRACTORS

All businesses interested in supplying goods or services to the above member organizations of the Chatham-Kent Lambton Administrators Group Operations/Purchasing Committee are invited to submit pre-qualification information and references. CKLAG will advertise and request pre-qualification on an “as needed” basis.

Pre-qualification forms are attached as Appendix D.

Evaluation of Contractor Qualifications Statement is attached as Appendix E

5.0 GENERAL SPECIFICATIONS FOR SUPPLY/ INSTALLATION/ SERVICE/ DELIVERY

5.1 PURPOSE AND TIME LIMITATIONS

It is the purpose of this work to supply all labour and materials to complete the scope of work at the facilities as listed in the attached "Scope of Work" in a manner, which is acceptable to the Chatham-Kent and Lambton Administrators Group and its member organizations. All references to "Contractor" shall include the meaning of "Supplier".

Each individual organization will issue its own special requirements relative to contract terms and conditions, which the contractor must comply with.

Attached Appendix(es) give the specifics of the projects for your reference.

5.2 TERMS

5.2.1 The contractor shall:

- Secure and maintain, during the full term of this contract, liability insurance coverage to the extent of at least \$2,000,000 per incident and commercial general automobile liability insurance to the extent of \$2,000,000 per incident for all licensed vehicles and equipment (leased or owned) provided. The member organization shall be designated as a named insured on any policy if requested.
- Enroll all workers, including all principals if so designated, and ensure all sub-contractor workers are enrolled under the Worker Safety Insurance Board and pay all rates and levies in connection therewith and do all things required of an employer under the said act. Where an independent operator, employer, or executive officer provides on-site work, they must first have applied to and be deemed a worker by the Workplace Safety Insurance Board or equivalent insurability.
- Pay all employees' wages and salaries promptly and pay for all materials promptly and shall indemnify and save harmless the member organization from all claims for construction lien as registered during the term of this contract or after the expiry date of the same, whether such lien is valid or not. The contractor shall forthwith have said lien removed from the title of the properties, or any part thereof, at the expense of the contractor and the contractor agrees to indemnify the member organization, against any damages and/or costs suffered or incurred by it as a consequence of the registration of any such lien.
- Provide a copy of its Health and Safety Policy and Practices and provide a statement agreeing to adhere to the Safe Work Policies and Practices of the member organization.
- Provide a copy of Workplace Safety Insurance Board's CAD # 7 Safety Record.

5.2.2 The contractor shall furnish all labour, equipment, transportation, etc. and any other incidentals required for the completion of work as listed, except as otherwise specified.

5.2.3 The contractor shall obtain any required permits and conform to any existing applicable codes, such as, the Canadian Standards Association, Underwriter's Laboratories of Canada, Ontario Fire Code, Ontario Building Code, Ontario Electrical Code, Legislation by the Ministry of Labour and Ministry of Environment, and all local Bylaws and any other applicable regulatory requirements.

5.2.4 The contractor shall be solely responsible for loss or damage of any tools, equipment, or material under his/her control on the property of member organizations.

5.2.5 All workers shall be trained, experienced, qualified, and appropriately licensed to carry out their work in the Province of Ontario.

- 5.2.6 Payment shall be made by the member organization within 30 days upon receipt of properly certified invoices, and completion of all details of project to the satisfaction of the member organization. All payments for construction projects to be subject to holdback as per provisions defined in the CONSTRUCTION LIEN ACT.
- 5.2.7 The amount payable to the contractor will not be increased or decreased by reason of any increase or decrease in the cost of plant equipment, labour, materials, taxes, or the wage as set out in the contract or purchase order.
- 5.2.8 No variation from the work that may involve or will result in an addition to the amount of the contract or reduction of quality, shall be proceeded with until approval has been obtained from the member organization.
- 5.2.9 Each tenderer shall visit and examine the sites and documents prior to submission of tender and obtain for themselves a clear and comprehensive knowledge of the conditions and limitations thereof.
- 5.2.10 On the completion of work, the site shall be left in a clean and orderly condition. All construction-generated debris shall be removed and disposed of off-site.
- 5.2.11 The contractor shall be responsible to meet quoted project completion deadlines.
- 5.2.12 If the contractor should neglect to execute the work properly or otherwise fails to comply with the requirements of the contract, the member organization may:
- a. correct such default and deduct the cost thereof from any payment then or thereafter due to the contractor, or;
 - b. terminate the contractor's right to continue with the work in whole or in part or terminate the contract.
- 5.2.13 Prior to commencement of any construction/maintenance work affecting the fabric of the building, the contractor shall review the designated hazardous substances report for the building (available from the member organization). The contractor shall evaluate the potential presence of designated hazardous substances in the specific work zone. If present, the member organization shall be notified, and no work is to proceed until specific direction is received from the member organization.
- 5.2.14 The contractor shall ensure that the work zone for construction and maintenance projects is clearly delineated by means of visual markers or barricades, and that no workers other than those employed by the contractor are present in the work zone.
- 5.2.15 It shall be the contractor's responsibility to ensure that all workers including owners designated as workers on the project abide by the regulations for construction projects as outlined by the Occupational Health and Safety Act latest version, as well as any other safety and environmental standards that are applicable by law or established by generally accepted industry standards or by applicable industry associations.

- 5.2.16 The contractor agrees to indemnify the member organization against any claims, fines, and costs incurred by it as a result of the contractor or workers breaching the Occupational Health and Safety Act, herein including costs incurred in preparing for and attending any hearings or trials in connection therein.
- 5.2.17 Where the scope of work affects the fabric of the building, a list of designated hazardous substances for each facility is included with this tender package. If this list is missing, the bidder shall obtain such a list from the member organization prior to submitting tender.
- 5.2.18 a. Contractors are encouraged to follow the three "R"s of good waste management: reuse, reduce, and recycle.
- b. Contractors must comply with the most current waste management legislation such as required under Ontario Regulation 102/94 for all construction and/or demolition work in excess of 2,000 square meters in area.
- 5.2.19 Any and all work, which may alter existing structural components or assemblies of the building, must have prior approval from the member organizations.

6.0 PROPOSALS

6.1 ISSUING OF PROPOSALS

A specification takers list should be maintained indicating company name, address, telephone/fax numbers, e-mail address, contact person, and any pertinent comments.

6.1.1 CHECKLIST FOR ISSUING RFP

This checklist is for internal use only. It is not sent with Request for Proposal.

BEFORE ISSUING REQUEST FOR PROPOSAL:

Based on receiving signed Forms of Intent and Forms of Participation, approval in principal has been obtained for the project.

There are very few mandatory requirements, i.e. items identified as "must", "mandatory", or "required", keeping in mind that any proposals not meeting all of the mandatory requirements cannot be considered further.

There is no conflict with any trade agreement or institutional procurement agreement.

The RFP clearly tells proposers what is expected of them.

Closing time, date, and location are clear.

Proposer's meeting date, time, and location are clear. Attendance at the proposer's meeting is not mandatory unless specified in the RFP.

Insurance requirements have been addressed in the RFP.

Evaluation criteria is clearly stated in the RFP.

Proposal closing date provides sufficient time for proposers to prepare a good proposal (suggested five to six weeks).

Items addressed more than once in the RFP (such as number of copies or each proposal required) have been double checked for accuracy.

The Purchasing Department and/or Legal Services have had a look at the RFP (especially for complex or high dollar value requirements).

Advertising method has been determined.

The document has been carefully checked for accuracy and simplicity.

If available, a copy of the proposed contract form will accompany the RFP. If not available, everything that will be called for in the contracts has been addressed in the RFP.

6.1.2 CHECKLIST FOR EVALUATING PROPOSALS

BEFORE EVALUATING PROPOSALS

The evaluation team has been selected and briefed, and a chairperson has been appointed.

Detailed evaluation criteria has been developed and points assigned to each criteria.

If the RFP was sent out by one participating member, a copy of the points rating has been approved by the evaluation team.

The points rating spreadsheet has been prepared.

DURING PROPOSAL EVALUATION PROCESS

Proposals are evaluated against the stated evaluation criteria and presentations, if requested.

All written material/documentation is preserved in a safe place.

All decisions are well documented and defensible. (Comments on proposals strengths and weaknesses are critical to successful proponent debriefing.)

Proponents are not contacted except where absolutely necessary. They are only given the opportunity to clarify information in their proposals, not to provide additional detail. All clarification is documented and maintained.

Files are neat and in good order for easy access to information in the event proponents request information. Information requested might include evaluations, name of successful proponent, and the contract amount.

Security of confidential information is ensured.

6.2 RECEIVING OF PROPOSALS

All proposals must be received as specified in the RFP.

Received proposals must be:

- Sealed
- Clearly marked as a reply to a specific RFP
- Clearly show the name and address of the Proponent
- Clearly show the RFP number and project or program name

Faxed proposals are not accepted. All sealed unopened proposals should be signed for by a designated person and logged in the "Proposal Register File" (copy attached).

The "Proposal Register File" should include:

- Receipt of proposal
- Date and time
- Signature of proposer
- Signature of receiver

The "Proposal Register File" should be kept in a secure location to protect the integrity of the process.

Late submissions will not be accepted.

6.3 OPENING OF PROPOSALS

- Proposals will be opened at a public meeting on the date and time indicated on the RFP.
- At least three members of the CKLAG Committee shall be present when opening the proposals which should include the Tender Co-ordinator.
- A checklist should be used to indicate the opening of the proposals and the dollar value of the proposal. All signatures are required on the checklist. The Committee representatives will also initial all form of tender pages received.
- Only the name of the proposer and the total dollar amount of each proposal will be announced.
- Public in attendance must be informed that this is not an acceptance or evaluation of the proposal and that the lowest proposal is not automatically awarded the contract.

6.4 EVALUATION/ACCEPTANCE OF PROPOSALS

6.4.1 EVALUATION

A Committee made up of CKLAG representatives will do the evaluation. The Evaluation Committee will have power to review the submissions and make a recommendation the full Purchasing Operations Committee on a successful bidder(s). The Purchasing/Operating Committee as a whole shall decide on the award of any contract and all committed members shall be bound by the decision of the Purchasing/Operating Committee.

CKLAG Operations/Purchasing Committee may request that the vendor make a short presentation to the CKLAG Committee, as part of the evaluation process.

Documentation of the evaluation process should include:

- Evaluation criteria and weightings
- List of firms invited to propose
- Proposers' meeting minutes
- List of firms who submitted a proposal
- Summary of spreadsheet and all evaluation documents

6.4.2 RECOMMENDATION

The members who have signed a Form of Commitment, upon reaching a majority consensus on the successful bidder, shall vote on the recommendation to purchase, as decided by the Sub-Committee. If there is not a clear majority decision by the participants, then the procedures under 6.4.2.1, "Inability to Reach a Majority Decision on a Proposal", shall be followed.

6.4.2.1 INABILITY TO REACH A MAJORITY DECISION ON A PROPOSAL

- If the procedures for issuing an RFP or Tender are followed correctly, the sub-committee in charge of the project should be able to reach a decision and a recommendation for award of a contract.
- In the event that the subcommittee reviewing the proposals, is unable to come to a majority decision on a successful bidder(s), the chair of the sub-committee shall notify the chair of the Purchasing/Operations committee.
- If it is urgent that the Proposal or Tender under review needs to be decided upon in a short timeframe, the Chair of the Purchasing/Operating Committee shall call an emergency meeting of the full Purchasing/Operating Committee to review the proposal or tender in question. If timing allows, the Proposal or Tender will be reviewed at the next scheduled meeting of the Purchasing/Operating Committee.
- All members attending the Purchasing/Operating Committee (whether or not they are "committed" to the proposal or tender) will review the results of the submissions. The Purchasing/Operating Committee as a whole will then decide how the contract will be awarded.
- If at this time, the full Purchasing/Operating Committee cannot agree on a resolution, the entire Proposal or Tender should be discarded, the bidders notified that this has happened and a new Proposal or Tender should be issued which clarifies to the bidders and the committee, the issues that prevented a majority decision at the sub-committee level.

6.4.2 ACCEPTANCE OF PROPOSALS

As indicated in the RFP:

- We reserve the right to award by item, or part thereof, to accept or reject any proposals in whole or in part, to waive irregularities and omissions, if in so doing, the best interest our organization will be served. No liability shall accrue to our organization for its decision in this regard.
- Acceptance criteria and rating process must be documented and available if requested.

7.0 CONTRACTS

7.1 SIGNING OF CONTRACTS

Upon acceptance of a proposal by the Acceptance Committee, Purchasing and Operations Committee members shall be required to enter into individual contracts between the member organization and the approved supplier.

The contract should take the form of a written purchase order and/or formal contract clearly and state reference to the accepted request for proposal.

It should also include (where possible):

1. Items included in the proposal and prices
2. Delivery instructions and terms
3. No member of the Committee should sign a contract on behalf of another CKLAG member.

Should a special form of contract be required due to the magnitude or specialized nature of a specific proposal, the CKLAG Committee should notify participating members and arrange for the formation of such a contract relying on the expertise of their departments and peers.

It is recommended that such contracts be viewed by a legal department of one of the participating CKLAG members.

7.2 CONTRACT COORDINATION

The individual or Committee responsible for the request for proposal, and any subsequent contract award, shall also act as a contract coordinator, set up and monitor the performance of the contract to ensure that the supplier's obligations are being met. The individual or Committee responsible will also be a conduit for communication between the supplier and the participating members of CKLAG.

Individual members shall be required to perform the day-to-day liaison required in the performance of any contract.

Should a problem arise in the performance of a supplier, the CKLAG member shall contact the CKLAG Sub-Committee to advise of the problem.

The CKLAG Sub-Committee shall monitor the problems and if affecting more than one CKLAG member, they shall:

1. Try to remedy the situation on behalf of the CKLAG members
2. Document the problems as a matter of record

Chatham-Kent Lambton Administrators Group (www.CKLAG.org)

FORM OF INTENT OF PARTICIPATION

We, the undersigned, being valid members of the Chatham-Kent Lambton Administrators Group - Standing Committee, hereby agree to participate in the collective development of a request for:

A final "Commitment To Participate" signature will be performed after a review of draft tender documents and before the tender documents are released for bid.

Furthermore, all parties agree to abide by the recommendation of the acceptance committee, who are appointed to analyze the bids and award the contract based on the policies and procedures of the Operations / Purchasing Committee.

INTENT TO PARTICIPATE

We hereby INTEND to participate in the above collective request.

MEMBER ORGANIZATION

SIGNATURE OF INTENT

DECLINE PARTICIPATION

We hereby decline to participate in the above collective request for pricing for purchase, for the following reason(s):

MEMBER ORGANIZATION

SIGNATURE OF NON-PARTICIPATION

CHIEF EXECUTIVE OFFICER

Dated this _____ day of _____, 200 ____.

Return to the Executive Coordinator by e-mail: elernout@netrover.com or by fax at 519-352-5073 before _____.

Chatham-Kent Lambton Administrators Group (www.CKLAG.org)

FORM OF COMMITMENT TO PARTICIPATE

We, the undersigned, being valid members of the Chatham-Kent Lambton Administrators Group – Standing Committee, and having reviewed the proposed tender for the purchase of:

COMMITMENT TO PARTICIPATE

- Hereby AGREE to participate in the above collective agreement.

MEMBER ORGANIZATION

SIGNATURE OF COMMITMENT

DECLINE PARTICIPATION

Hereby decline to participate in the above collective agreement, for the following reason(s):

MEMBER ORGANIZATION

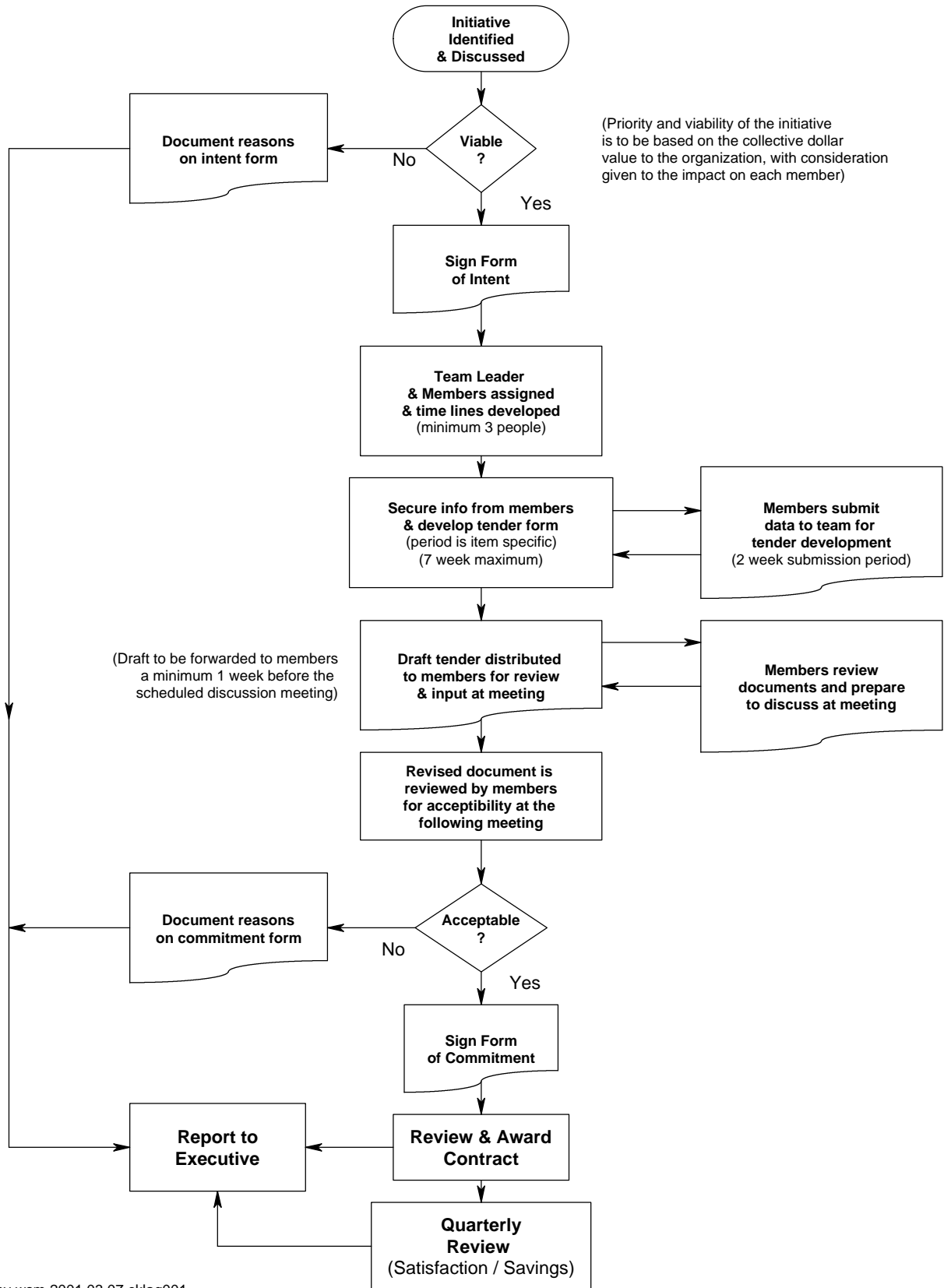
SIGNATURE OF NON-PARTICIPATION

CHIEF EXECUTIVE OFFICER

Dated this _____ day of _____, 200__.

Return to the Executive Coordinator by e-mail: elernout@netrover.com or by fax at 519-352-5073 before _____

Proposed CKLAG Initiative Commitment Process



CONTRACTOR/SUPPLIER PREQUALIFICATION STATEMENT

This document must be submitted prior to invitation to tender. Chatham-Kent and Lambton Administrators Group will, upon submission of this fully completed form, evaluate the information contained therein and, if found satisfactory to the Purchasing and Operations Committee in its sole discretion, will place the contractor/supplier on an approved bidders list which will be reviewed by the Committee from time to time.

- 1) Application Legal Name of Firm_____

Address_____

Postal Code_____ Phone(_____)_____ Fax(_____)_____
- 2) Type of Organization (Limited Corp., Partnership, Proprietorship, Other) (Specify)

- 3) Date of Incorporation/Establishment_____
- 4) Names, Title and addresses of **ALL** Officers, Partners, Owners, etc.

Name _____ Title _____ Address _____ Phone No. _____

- 5) Total number of permanent employees _____

Average annual number of temporary employees_____
- 6) Total value of business conducted in last year \$_____.
- 7) Financial References:

Name of Bank/Institution_____

Branch Address_____

Contact Name _____ Title _____

Phone (_____)_____
- 8) List three businesses/organizations that could be contacted for Performance References:

Company_____ Contact_____ Phone_____

Company_____ Contact_____ Phone_____

Company_____ Contact_____ Phone_____
- 9) Worker's Compensation Board coverage: Letter of good standing must be submitted with qualification forms.

Account Number: _____

Expire Date: _____

10) List of projects or on-going supply contracts either completed or in progress (over the Past 3 years). Complete Schedule "A" and "B".

11) Contractor Performance Records. Complete Schedule "C".

12) Liability Insurance

Insurance Agent _____

Insurance Company _____

Value of Policy _____ (Attach Copy of Policy)

13) Commercial General Automobile Liability Insurance

Insurance Agent _____

Insurance Company _____

Value of Policy _____ (Attach Copy of Policy)

14) The CKLAG Purchasing and Operations Committee is hereby authorized to have access to request or inspect any information and/or records as may be appropriate to confirm data provided in and with this application.

15) Declaration:

The above information is true and correct as _____
DATE OF SIGNATURE

SIGNATURE

NAME

FIRM NAME

Any changes to the above information should be promptly forwarded to the CKLAG Purchasing and Operations Committee Executive Coordinator.

Signature

Firm

Name

Return all completed documents to:

CKLAG Operations-Purchasing Committee Chair

Address:

Contact:

SCHEDULE "A"

List of Projects or on-going maintenance completed or in progress (over past 3 years)
FOR SCHOOL BOARDS:

Annual Or Project Value \$0000	Maintenance Contract Expiry Date	Length of Contract (Years)
--------------------------------------	--	----------------------------------

Project _____

Owner _____

Contact _____ Tel: _____

Arch/Eng. _____

Contact _____ Tel: _____

Major Suppliers: Company Name Telephone City

- 1. _____
- 2. _____
- 3. _____

Annual Or Project Value \$0000	Maintenance Contract Expiry Date	Length of Contract (Years)
--------------------------------------	--	----------------------------------

Project _____

Owner _____

Contact _____ Tel: _____

Arch/Eng. _____

Contact _____ Tel: _____

Major Suppliers: Company Name Telephone City

- 1. _____
- 2. _____
- 3. _____

Submission of this schedule authorizes the St. Clair Catholic District School board to contact companies and names for references.

SCHEDULE "B"

List of Projects or on-going maintenance completed or in progress (over past 3 years)
FOR OTHER THAN SCHOOL BOARDS:

Annual Or Project Value \$0000	Maintenance Contract Expiry Date	Length of Contract (Years)
--------------------------------------	--	----------------------------------

Project _____

Owner _____

Contact _____ Tel: _____

Arch/Eng. _____

Contact _____ Tel: _____

Major Suppliers:	Company Name	Telephone	City
------------------	--------------	-----------	------

- 1. _____
- 2. _____
- 3. _____

Annual Or Project Value \$0000	Maintenance Contract Expiry Date	Length of Contract (Years)
--------------------------------------	--	----------------------------------

Project _____

Owner _____

Contact _____ Tel: _____

Arch/Eng. _____

Contact _____ Tel: _____

Major Suppliers:	Company Name	Telephone	City
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- 1. _____
- 2. _____
- 3. _____

Submission of this schedule authorizes the St. Clair Catholic District School board to contact companies and names for references.

CONTRACTOR PERFORMANCE RECORD

- 1) List the type of work your company specializes in:

- 2) List all workmanship/quality/legislated standards that your company follows (e.g. Building Code, Fire Code, Occupational Health & Safety Act, Industry Association Standards, etc.)

- 3) Attach a copy of your company's:
- 1) Quality Control Policy and Program
 - 2) Health & Safety Policy
 - 3) Safety Training Program
 - 4) Accident Record (excluding confidential information)

- 4) Provide list of supervisors who will potentially work on the premises. List to include names, three most recent projects, and professional qualification of each.

EVALUATION OF CONTRACTOR QUALIFICATION STATEMENT
(BUILDING, GROUNDS, MAINTENANCE)

Contractor _____

Project/Service _____

Section A - Mandatory Items

1. Submission of duly completed for "Contractor Qualification Statement", and required financial references along with letters and attachments. YES / NO
2. Successful completion of at least one year in business specified. YES / NO

Section B - References

Score (Scale of 0 - 10) 10 = Perfect 4 = Unacceptable	Optimum Score	Actual Score
<ol style="list-style-type: none"> 1. Total value of projects/maintenance/supply contracts with an average of \$____,000 or more during the last three years, with a project of at least \$____,000 or more during that period. 2. Handling of the following areas in recently completed projects: <ol style="list-style-type: none"> a. Contractor/supplier staff, co-ordination, and supervision of work. b. Schedule and planning, including critical path analysis c. Sub-contractors and suppliers 3. Working relationship with other parties: <ol style="list-style-type: none"> a. Contractors/transportation b. Owners c. Inspectors and/or other authorities 4. Correction of deficiencies and total completion 5. General quality of workmanship/product 6. Management and support staff in office including submission of documents, shop drawings, samples, processing of change orders, manuals, warranties, etc. 		
TOTAL		

A minimum of _____ points (75 %) becomes a pass for all Contractors.

Contractor	Not Approved	Supplier
Approved for \$10,000	Approved for \$50,000	Approved for \$200,000

REFERENCES FOR ON-SITE CONSTRUCTION AND MAINTENANCE PROJECTS

NAME OF CONTRACTOR/SUPPLIER: _____

List of on-site projects or ongoing maintenance completed or in progress (over past three years)

Project Name	Annual or Project Value \$000	Maintenance Contract Expiry Date	Length of Contract (Years)

Owner _____

Contact _____ Phone No. _____

Arch/Eng. _____

Contact _____ Phone No. _____

Major Suppliers: Company Name Phone No. City

1. _____

2. _____

3. _____

NAME OF CONTRACTOR/SUPPLIER: _____

Project Name	Annual or Project Value \$000	Maintenance Contract Expiry Date	Length of Contract (Years)

Owner _____

Contact _____ **Phone No.** _____

Arch/Eng. _____

Contact _____ **Phone No.** _____

Major Suppliers: Company Name Phone No. City

1. _____

2. _____

3 _____

SCHEDULE "A"

NAME OF CONTRACTOR/SUPPLIER: _____

Project Name	Annual or Project Value \$000	Maintenance Contract Expiry Date	Length of Contract (Years)

Owner _____

Contact _____ **Phone No.** _____

Arch/Eng. _____

Contact _____ **Phone No.** _____

Major Suppliers: Company Name Phone No. City

1. _____

2. _____

3 _____

SCHEDULE "B"

REFERENCES FOR SUPPLIERS OF GOODS

List of major orders or ongoing supply contracts completed or in progress (over past three years)

NAME OF CONTRACTOR/SUPPLIER: _____

Project Name	Annual or Project Value \$000	Maintenance Contract Expiry Date	Length of Contract (Years)

Owner _____

Contact _____ Phone No. _____

Project Name	Annual or Project Value \$000	Maintenance Contract Expiry Date	Length of Contract (Years)

Owner _____

Contact _____ Phone No. _____

Project Name	Annual or Project Value \$000	Maintenance Contract Expiry Date	Length of Contract (Years)

Owner _____

Contact _____ Phone No. _____

Project Name	Annual or Project Value \$000	Maintenance Contract Expiry Date	Length of Contract (Years)

Owner _____

Contact _____ Phone No. _____

Submission of this schedule authorizes the CKLAG Purchasing and Operations Committee to contact companies and names for references.

SCHEDULE "C"

CONTRACTOR/SUPPLIER PROFILE

NAME OF CONTRACTOR/SUPPLIER: _____

1. List the type of work or product your company specializes in:

2. List all product/workmanship/quality/legislated standards that our company follows (e.g. C.S.A. Building Code, Fire Code, Occupational Health and Safety Act, Industry Association Standards, etc.)

3. Attach a copy of your companies:

- a. Quality Control Policy and Program**
- b. Health and Safety Policy**
- c. Safety Training Program**
- d. Accident Record (excluding confidential information)**

4. Provide a list of supervisors who will potentially work on the premises of member organizations. List to include names, three most recent projects, and professional qualification of each.