



Stratford Public Library Purchasing Policy

Legal References: Municipal Act, 2001 Part IV, s.270;
Accessibility for Ontarians with Disabilities, 2005;
Occupational Health and Safety Act, R.S.O. 1990 c.01;
Municipal Freedom of Information and Protection of Privacy Act;
Ontario Discriminatory Business Practices Act, R.S.O., 1990

Policy References:

1.0 LEGISLATIVE AUTHORITY

1.1 The Municipal Act, 2001 Part VI, Section 270, as amended states that a municipality and a local board shall adopt policies with respect to its procurement of goods and services, including policies with respect to:

- (a) the types of procurement processes that shall be used;
- (b) the goals to be achieved by using each type of procurement process;
- (c) the circumstances under which each type of procurement process shall be used;
- (d) the circumstances under which a tendering process is not required;
- (e) the circumstances under which in-house bids will be encouraged as part of a tendering process;
- (f) how the integrity of each procurement process will be maintained;
- (g) how the interests of the municipality or local board, as the case may be, the public and persons participating in a procurement process will be protected;
- (h) how and when the procurement processes will be reviewed to evaluate their effectiveness; and
- (i) any other prescribed matter.

1.2 Compliance with legislation procurement activities shall be subject to all applicable Library policies and by-laws and all other relevant Municipal, Federal, and Provincial legislation.

Pursuant to the *Accessibility for Ontarians with Disabilities Act, 2005*, the Library Board maintains a focus on accessibility issues and the development of strategic actions to remove (where possible) and prevent barriers to access for people with disabilities. All competitive bids will incorporate measures to ensure that customer service is available to everyone, including persons with disabilities.

2.0 PURPOSE OF PURCHASING POLICY

- 2.1 The purpose of this policy is to set out guidelines for the library to ensure that all purchases of materials, supplies and services provide the lowest costs consistent with the required quality and service.
- 2.2 An open and honest process shall be maintained that is fair and impartial.
- 2.3 The purchasing policy will promote and maintain the integrity of the purchasing process and protect the Board, staff and vendors involved in the process, by providing clear direction and accountabilities.

3.0 GENERAL PROVISIONS

- 3.1 No contract or purchase shall be divided to avoid any requirements of this policy.
- 3.2 The Library shall be responsible for the preparation of specifications. Such specifications are to be generic or “as equivalent”.
- 3.3 No appointed officer or employee of Stratford Public Library or of The Corporation of the City of Stratford (Corporation) will have any interest directly or indirectly, as a contracting party, partner, shareholder, surety or otherwise in any contract for goods or services or in any of the monies to be derived therefrom, unless by resolution of the Board prior to the award of a sealed bid.
- 3.4 If the Chief Executive Officer has a direct or indirect interest and is responsible for the quote or tender, the process shall be undertaken by a designate appointed by the Board.
- 3.6 The Library does not accept bids made by Library employees submitted in response to a bid solicitation where the provision of the goods or services will be provided entirely by the Library employees, otherwise known as In House Bids.
- 3.7 The Library may participate with other entities in co-operative purchase ventures when the best interests of the Library will be served.

- 3.8 No tender, proposal or quotation will be accepted from any bidder inclusive of its subcontractor, which has a claim or instituted a legal proceeding or has threatened a claim or legal proceeding against the Library or against whom the Library has a claim or instituted a legal proceeding with respect to any previous contract, without prior approval by the Board.
- 3.9 The Library will review its contracts and tender specifications for goods and services, to ensure that wherever possible and economical as determined by the Library, specifications are amended to provide for expanded use of products and services that contain post-consumer recyclable waste and/or recyclable content to the maximum level allowable, without significantly affecting the intended use or performance of the product or service. It is also recognized that a cost analysis may be required in order to ensure that the products are made available at competitive prices in order to increase the development and awareness of Environmentally Sound Products. Any recommendation to award the aforementioned will be in favour of a bidder meeting specification, terms and conditions of the tender and whose tender offers the lowest ultimate cost to the City for the goods or services being tendered with due consideration of the importance of quality, service and price.
- 3.10 The disclosure of information received relevant to the issue of a bid solicitation or the award of contracts emanating from bid solicitations shall be made by the appropriate offices in accordance with the provisions of the *Municipal Freedom of Information and Protection of Privacy Act*, R.S.O. 1990, as amended.

4.0 APPLICATION

- 4.1 Stratford Public Library Board, its Chief Executive Officer and other employees of the Library are bound by this Policy.

5.0 AUTHORITY

- 5.1 The Library Board, in its authority per the *Public Libraries Act*, has delegated to the Chief Executive Officer of the Stratford Public Library the responsibility to oversee all Library purchasing.

6.0 CHIEF EXECUTIVE OFFICER RESPONSIBILITIES

- 6.1 The Chief Executive Officer is responsible for:
- a) The management, organization, and administration of a Library purchasing policy that is in general accord with the city-wide, municipal purchase function as administered by the Manager of Financial Services for the City of Stratford;

- b) Preparing, issuing, and receiving Requests for Proposal, Tenders, Quotations and Inquiries for goods and services, and for arranging the disposal of surplus goods;
- c) Where feasible and desirable, participating in the joint purchasing program as administered by the Manager of Financial Services for the City of Stratford.

7.0 EMPLOYEE RESPONSIBILITIES

- 7.1 Each employee empowered to create, authorize, and issue Purchase Orders in the name of the Library is to understand that these steps constitute a commitment by the Library to honour the purchase of goods and services from vendors, for which the employee is to be held accountable.

8.0 CONSULTING FIRM RESPONSIBILITIES

- 8.1 Should it be deemed advantageous to engage the services of a consultant in the bidding process, the Chief Executive Officer must ensure the consultant is aware of and follows the Library's purchasing policies and procedures.
- 8.2 Consultants are to provide a copy of any documentation being issued in the Library's name, to the Chief Executive Officer or her/his designate prior to issuance.

9.0 FINANCIAL ACCOUNTABILITY

- 9.1 The Chief Executive Officer shall not authorize purchases unless said purchases have been approved in the annual budget or authorized by the Board. Where this policy prescribes dollar limits, the contract amount shall be the estimated total acquisition cost less any applicable taxes.

10.0 CONTRACT ADMINISTRATION

- 10.1 It shall be the responsibility of the Chief Executive Officer to enforce the contract terms, conditions and specifications.
- 10.2 The Chief Executive Officer may remove the vendor's name from the list of bidders for a period of up to two years on the basis of documented poor performance, non-performance or conflict of interest. This could include but is not limited to failure to meet completion dates, follow instructions, non-compliance with the *Occupational Health and Safety Act* R.S.O. 1990 c.01 as amended, or failure to comply with the terms and conditions of the contract. A written notice of the decision will be provided to the vendor by the Chief Executive Officer. To be reinstated on the bidder's list, the vendor shall supply an updated company profile and 3 recent references which will be evaluated by the Chief Executive Officer.

11.0 REQUESTS FOR VENDOR INPUT

- 11.1 Vendors or potential vendors should not be requested to expend time, money or effort on design or in developing specifications or otherwise help define a requirement beyond the normal level of service expected from vendors.
- 11.2 When such services are required:
- a) the contracted vendor will be considered as a consultant and unable to make an offer for the supply of goods and services;
 - b) shall be paid a fee; and,
 - c) the detailed specifications become the property of the Library for use in obtaining competitive bids

12.0 GRATUITIES

- 12.1 Individuals and firms may offer gifts, discounts and benefits of a pecuniary nature to employees. As public servants, employees are not ever in a position to use their position to return a favour. The remuneration paid to Library employees is intended to fully remunerate them for service to the Stratford Public Library. Except as provided below, Library employees shall not solicit, accept, offer or agree to accept a commission, reward, gift, advantage or benefit of any kind, personally or through a family member or friend, or any person or business which is connected directly or indirectly with the performance or duties of office.
- 12.2 Library employees are not precluded from accepting moderate hospitality as an accepted courtesy of a business relationship, namely:
- a) food and beverages at banquets, receptions, ceremonies or similar events;
 - b) moderate hospitality as a common expression of courtesy in a business relationship and not beyond what would be allowed to be claimed as a business expense.
 - c) services provided without compensation by persons volunteering their time;
 - d) food, lodging, transportation and entertainment provided by other levels of governments or other governments or boards;
 - e) a reimbursement of reasonable expenses incurred in the performance of duties of office;
 - f) a reimbursement of reasonable expenses incurred in the performance of activities connected with other associations;
 - g) token gifts such as souvenirs, mementoes and commemorative gifts that are given in recognition of service on a committee, for speaking at an event or representing the City at an event; and
 - h) gifts that are received as an incident of protocol or social obligation that normally and reasonably accompany the responsibility of office.

- 12.3 Employees shall return any gifts or benefits which exceed these limits, along with an explanation why the gifts or benefits cannot be accepted. In all cases, the employee shall notify their immediate supervisor or the supervisor's designate in advance of participating in such hospitality.
- 12.4 The Library recognizes that, from time to time, gifts will be donated for special municipal events, charitable events or municipal functions. The department head, or designate, shall be notified by email of the donated gift. Any employee receiving a gift, discount or benefit, directly or indirectly, from an individual or private business with a value of \$100.00 or more shall record such gift, discount or benefit on a log. Any employee with an amount entered on the log shall provide such log to their supervisor each January for the preceding calendar year. Any gifts, discounts, or benefits received over \$500.00 in value may be included as an employee taxable benefit in accordance with Canada Revenue Agency guidelines.

13.0 LOCAL VENDOR/SUPPLIER PREFERENCE

- 13.1 The Library does not have or use any "Local Vendor or Supplier Preference" in its dealings, in order to comply with the *Ontario Discriminatory Business Practices Act*, R.S.O., 1990, as amended.

14.0 ADVERTISING

- 14.1 Calls for bids shall be advertised on the Library's website and where effective in the opinion of the Chief Executive Officer, in local newspapers and applicable publications or where necessary to comply with all existing statutory regulations.

15.0 BID ADDENDUM

15.1 In no instance shall anyone except the Chief Executive Officer or her/his designate, issue any verbal or written changes on a bid. All changes must be done through addendum issued with the approval of the Chief Executive Officer.

16.0 BID DEPOSITS

16.1 Bid deposits of no less than 5% of the estimated value of the work shall be required to accompany bid submissions for the following:

- 1) All bids for construction projects in excess of \$100,000.
- 2) Special contracts or scope of work as deemed appropriate by the Chief Executive Officer.

16.2 A bid deposit shall be provided in one of the following formats:

- a) Bid bonds or an agreement to bond issued by a bonding agency licensed to operate in the Province of Ontario naming the Library as the obliged.
- b) Irrevocable letter of credit naming the Library as the beneficiary.

16.3 The Library does not pay interest on any bid deposits.

16.4 The Library reserves the right to turn the bid deposit of the successful bidder into a financial guarantee if specified in the bid documents.

17.0 BONDING REQUIREMENTS

17.1 Performance, labour and material, and/or maintenance bonds are required for all construction projects exceeding \$100,000 for a minimum of 50% of the bid amount. The cost for bonding is to be included in the submission price.

17.2 All bonds must be in the form of a digital bond or scanned PDF with the original to follow upon request or as specified in the bid document.

17.3 Where performance, labour and material and/or maintenance bonding is required, an agreement to bond must be included with the bid submission in the form of a digital bond or scanned PDF, with the original to follow upon request or as specified in the bid document.

17.4 For some smaller construction projects under \$250,000, an irrevocable letter of credit

for 100% of the bid amount may be accepted in lieu of bonding if specified in the bid documents. Such irrevocable letter of credit must include terms and conditions acceptable to the Library as specified in the bid documents.

18.0 INSURANCE

- 18.1 The standard insurance minimums are as follows:
- \$2 million – commercial general liability policy
 - \$2 million – owned and non-owned automotive liability policy
 - \$2 million – homeowners (e.g. for rental of facilities)
 - \$2 million – professional errors and omissions liability (as applicable)
 - \$2 million – environmental impairment liability (as applicable)
 - The amount of the project cost - Builders Risk (as applicable)

Other Insurance Coverage – the Library reserves the right to request such higher limits of insurance or other types of policies appropriate to the Agreement as the Library may reasonably request from time to time.

19.0 BID ANALYSIS

- 19.1 Bid submissions shall be analyzed by the Chief Executive Officer and her/his designates and a recommendation made. The dollar amount will determine which level of approval is required. Prior to the undertaking of the work the Chief Executive Officer is to ensure all the required documentation is in place.

20.0 BID IRREGULARITIES

- 20.1 Bid irregularities are defined in Schedule A.

21.0 BIDS WITH EQUAL TOTAL PRICES

- 21.1 If two low bids are found to be equal in price, quality and service, the successful bidder shall be determined by coin toss. The coin toss shall be performed by the Chief Executive Officer in the presences of a representative of the Library and the tied bidders.

22.0 PROCESS FOR REDUCING COST OF OVERBUDGET BID SUBMISSIONS

- 22.1 If the lowest tender is within 10% of the budget amount the Library has the right to reject all bids or negotiate with the low bidder.
- 22.2 If the lowest bid is more than 10% higher than the budget amount the Library has the right to reject all bids, negotiate with the lowest bidder or request potential cost savings

from the three lowest bidders and any other bidders whose prices are within 10% of the lowest received. All requests and submissions shall be made in writing. Listed sub trades may not be substituted in this process.

- 22.3 Once potential cost savings have been identified the Library has the right to request a final revised base bid submission of the bidders.
- 22.4 Requests for potential cost savings shall be limited to deletions from the scope of work and associated changes or changes of materials and finishes. The Library shall not request pricing of significant design modifications without the approval of the bidder(s).

23.0 BID WITHDRAWAL

- 23.1 Requests for withdrawal of a quotation or tender shall be allowed if the request is made before the closing time. The withdrawal of a tender does not disqualify a bidder from submitting another tender on the same contract.
- 23.2 Should a bidder wish to withdraw their bid subsequent to the closing time or fails to proceed with the contract, the Library shall first obtain legal advice. At minimum the bidder may forfeit their bid deposit and be prohibited from bidding on future opportunities for a period of one year.
- 23.3 The Library reserves the right to withdraw any posted bid documents prior to closing. Such withdrawal will be posted as an Addendum. The Library also reserves the right to accept or reject any bids.

24.0 DISPUTE RESOLUTION

- 24.1 Disputes shall be resolved as follows:
 - a) Meeting including the bidder, the employee making the purchase and the Chief Executive Officer.
 - b) If (a) does not lead to a resolution the decision may be appealed to the Board

25.0 DISPOSAL OF SURPLUS GOODS

- 25.1 The Chief Executive Officer shall, from time to time, dispose of any surplus goods not required by the Library by way of:
 - a) sealed bid,
 - b) sale by auction or consignment,
 - c) direct negotiation with buyers
 - d) donation to a charitable organization

- 25.2 No employee, member of the Board or the public shall be allowed to purchase any surplus goods directly from the Library with the exception of discarded library books.
- 25.3 Surplus goods and/or products, at the discretion of the Chief Executive Officer, may become the property of the Contractor, to be disposed of at their discretion.
- 25.4 In the event that the item does not sell by any of the means provided, the Library may use an alternate method of disposal, ie. scrap

26.0 SOURCE SELECTION CRITERIA

- 26.1 The Library uses the following criteria for the selection of the method for the acquisition of goods/services:
 - a) total dollar value as estimated for the product/project.
 - b) availability of vendors capable of supplying product.
 - c) pre-determined qualification of vendors/suppliers.
 - d) nature of need of product, such as an emergency situation which requires immediate attention.

27.0 SOURCE SELECTION METHODS AND APPROVAL AUTHORITY

- 27.1 Stratford Public Library uses the following methods of purchasing Goods and Services:
 - 1) Standard Purchases (Up to \$25,000)
 - 2) Sealed Quotations (\$25,000 to \$100,000)
 - 3) Sealed Tenders (Greater than \$100,000)
 - 4) Request for Proposal
 - 5) Request for Information
 - 6) Request for Pre-qualification
 - 7) Sole Source Purchases
 - 8) Purchase at Public Auction
 - 9) Emergency Purchases

Dollar Amount	Authorization Required	Board Process
Up to \$25,000	Any employee authorized by CEO	No requirement to notify Board
\$25,000 to \$100,000	CEO	Notification of quotation call
Greater than \$100,000	Board	Notification of tender call; awarded through Board resolution

28.0 STANDARD PURCHASES (Up to \$25,000)

28.1 A Standard Purchase is one in an amount less than \$25,000 and is accomplished by using a Purchase Order. For purchases greater than \$5,000 but less than \$25,000, authorized employees are first to obtain at least three (3) written quotations whenever possible. Quotation documents and specifications can be issued and received by e-mail or fax transmission.

29.0 SEALED QUOTATIONS (\$25,000 to \$100,000)

29.1 Competitive sealed quotation bidding will be the source selection used when the following conditions prevail:

- a) The item to be purchased is budgeted to cost between \$25,000 and \$100,000.
- b) Clear and adequate specifications for the item or service are available or can be developed.
- c) Adequate competition is available. Two or more responsible bidders are able to satisfy the buyer's requirements and criteria set forth in the Invitation to Bid, and independently contend for the contract.
- d) Sufficient time is available for the preparation of bid invitations, advertising and preparation of bids submissions by vendors.

29.2 Quotations to be awarded are not subject to Board approval as provided for in this policy; however, prior notification to the Board is required when seeking sealed quotes.

30.0 SEALED TENDERS (Greater than \$100,000)

30.1 Competitive sealed tender bidding will be the source selection used when the conditions in Sealed Quotations prevail, with the exception the cost of the item to be purchased is budgeted to exceed \$100,000.

30.2 Prior notification to the Board is required when calling tenders. Board approval shall be in the form of a resolution.

31.0 REQUEST FOR PROPOSAL (RFP)

31.1 A Request for Proposal is used when the goods/services are of a highly specialized or flexible nature. This allows the Library to generalize the description of the project and this in turn has the vendors provide their bids on the latest and best products in their line.

31.2 Prior notification to the Board is required. The evaluation criteria and process shall be approved by the Chief Executive Officer prior to the issuance of the Request for

Proposal. Requests for Proposal budgeted to exceed \$100,000 are to be awarded by Board resolution.

32.0 CONSULTANTS

32.1 The Library building is owned by the City and, accordingly, engagement of architects and consultants is normally performed by the City under the City's policies. Nonetheless, should a situation arise where the Library wishes to engage an architect and/or other consultant related to the building, this section shall apply.

32.2 The Library shall issue a Request for Proposal for architectural services for Library building projects in excess of \$300,000.

32.3 From time to time, consultants are required to provide specialized expertise. Consultants would not involve the Library's ongoing legal counsel, audit services and planning advice (special projects excluded). For projects where the consultant's fees are expected to be in excess of \$60,000 for an individual project, the purchasing policy shall apply.

33.0 REQUEST FOR INFORMATION

33.1 A request for information is used as a general market research tool to determine what goods and service(s) are available which will meet business or operational requirements and acquisition strategies and/or may occasionally request project estimate costs for the purpose of developing a solicitation.

34.0 REQUEST FOR PRE-QUALIFICATION

34.1 A request for pre-qualification may be conducted for any goods, service(s) or construction to select the number of qualified bidders that may bid on the subsequent procurement process. This selection does not create any contractual obligation.

35.0 SOLE SOURCE PURCHASES (non-competitive)

35.1 A sole source supplier shall be the only acceptable vendor who is able to furnish a certain product or service. In all cases, sole source purchases will not be permitted solely because there is a preference for a particular brand. The Chief Executive Officer will be responsible for making all sole source determinations. In doing so, she/he must consider:

- a) Is there a lack of reasonable competition for a product or service that is vital to the operation of the Library?
- b) Does the supplier possess exclusive capabilities?
- c) Is the product or service unique and easily established as one of a kind?

- d) Can program requirements be modified so that competitive products or services may be used?
- e) Are there patented or proprietary rights that fully demonstrate:
 - 1. A feature providing a superior utility not obtainable from similar products?
 - 2. A product is available from only one prime source, and not merchandized through wholesalers, jobbers or retailers where competition could be encouraged.
 - 3. What consequences there would be to the Library do if the product or service were discontinued.
 - 4. In the case of any sole source purchase, the Library shall retain a statement signed by the Chief Executive Officer, which verifies that the item or service purchased can be obtained from only one supplier and therefore meets the Sole Source criteria.

36.0 EQUIPMENT REPAIRS

- 36.1 In the case of equipment repairs for amounts not exceeding \$25,000, the Chief Executive Officer shall be authorized to select from various vendors not solely on the basis of cost, but also on ability, quality or workmanship, service availability, overall performance and experience without first obtaining quotations.

37.0 PURCHASE AT PUBLIC AUCTION

- 37.1 In instances where the Library wishes to purchase through public auction, the Chief Executive Officer shall be advised of the conditions involved in the proposed transaction, prior to the event.

38.0 EMERGENCY PURCHASES

- 38.1 Emergencies shall exist when there is a threat to health, welfare, or safety of people/or property, or when the operation of the Library is in jeopardy. The Chief Executive Officer shall delegate the purchasing function as appropriate. Control, however, will not be delegated, and the purchasing employee will be required to forward a complete record of the emergency purchase to the Chief Executive Officer.

39.0 LONG-TERM TENDERS/QUOTATIONS

- 39.1 Long-term tenders and quotations may be entered into for everyday goods and services when the following conditions apply:
 - a) To obtain satisfactory pricing.
 - b) To provide uniformity within the Library or with the City of Stratford.
 - c) To maintain inventories as required.

- d) To reduce the amount of paperwork by eliminating day to day issuing of Purchase Orders and invoicing.
- e) To allow accurate figures for annual budgets for operating supplies.

40.0 ACQUISITION OF GOODS AND SERVICES FROM GOVERNMENT BODIES

- 40.1 The Chief Executive Officer may acquire any goods and services from a Federal, Provincial, or Municipal body, ministry, agency, board, corporation or authority when similar goods or services are not available from other sources or in the case of Provincial or Federal standing agreements. The Chief Executive Officer may take advantage of these opportunities if they are deemed to be in the best interest of the Library.

41.0 TECHNOLOGY SOLUTIONS

- 41.1 All technology solutions that will be connected to a City of Stratford system or network including but not limited to computer equipment and peripherals, software solutions, telephone and cellular equipment, PDA's and portable computing devices, MUST BE ordered through the Corporate Services Department of the City of Stratford. This Department will call quotations/tenders/ requests for proposals for items over \$5,000 in accordance with this Policy. Exceptions to this clause includes technology or automated solutions that do not require computer process, network or communication configuration.

42.0 LOBBYING PROHIBITED

- 42.1 The Library will be entitled to reject a bid submission if any representative or a Bidder, including any other parties that may be involved in a joint venture, consortium, subcontractor or Supplier relationship, makes any representation or solicitation to any elected official, employee or agent of the Library during the blackout period.

43.0 RETENTION OF DOCUMENTATION

- 43.1 All background information, information submitted by vendors, purchase orders and other relevant information involved in obtaining prices for goods and services shall be retained for the current year and (7) years in records retention.

44.0 PURCHASING PROCESS REVIEW

- 44.1 The Chief Executive Officer will review Library purchasing related files on an on-going basis to review the effectiveness and integrity of the processes and policy adherence. Every three (5) years this policy will be reviewed with a report being made the Library Board.

45.0 PURCHASING PROCEDURES

45.1 Purchasing procedures as determined by the Chief Executive Officer are to be used as a guideline and for information on purchasing goods and services in compliance with this policy.

46.0 EXEMPTION BY LIBRARY BOARD

46.1 The Chief Executive Officer may request exemption from any or all the purchasing methods outlined in this policy by submission of a report requesting the same to the Stratford Public Library Board. Such example may be granted by resolution.

Schedule "A"

Bid Irregularities

A bid irregularity is a deviation between the requirements (terms, conditions, specifications, special instructions) of a bid request and the information provided in a bid response. For the purposes of this policy, bid irregularities are further classified as "major irregularities" or "minor irregularities"

A "**major irregularity**" is a deviation from the bid request that affects the price, quality, quantity or delivery, and is material to the award. If the deviation is permitted, the bidder could gain an unfair advantage over competitors. A bid with major deviations must be rejected.

A "**minor deviation**" is a deviation from the bid request, which affects form, rather than substance. The effect on the price, quality, quantity or delivery is not material to the award. If the deviation is permitted or corrected, the bidder would not gain an unfair advantage over competitors. The bidder will be permitted to correct a minor irregularity.

Mathematical Errors – Corrections by Staff

Errors in mathematical extensions and/or taxes and unit prices will be corrected by the Library and the bidder will be notified of the correction.

Vendor Withdrawal

In the event that the vendor withdraws their bid due to the identification of a major irregularity, the vendor will forfeit their bid deposit and the Library has the right to disqualify such vendor from participating in future bid opportunities for a period of up to one year.

BID IRREGULARITIES

ITEM	DESCRIPTION	MAJOR	MINOR	ACTION
1.	late bids	X		automatic rejection
2.	bids completed in pencil	X		automatic rejection
3.	bid surety not submitted with the bid when the bid request indicated that such surety is required	X		automatic rejection
4.	EXECUTION OF AGREEMENT TO BOND: a. Bond company corporate seal or equivalent proof of authority to bind company or signature missing b. surety company not licensed to do business in Ontario	X X		automatic rejection automatic rejection
5.	EXECUTION OF BID BONDS: a. corporate seal or equivalent proof of	X		automatic rejection

	authority to bind company or signature of the BIDDER or both missing b. corporate seal or equivalent proof of authority to bind company or signature of BONDING COMPANY missing	X		automatic rejection
6.	unsealed tender envelopes	X		automatic rejection
7.	pricing, specifications page or signature pages missing	X		automatic rejection
8.	insufficient financial security (i.e.: no deposit or bid bond or insufficient deposit)	X		where security is required and amount of security is specified in request, automatic rejection
9.	bid received on documents other than those provided in request	X		not acceptable unless specified otherwise in the request
10.	bid document does not acknowledge addenda issued	X		automatic rejection
11.	EXECUTION OF BID DOCUMENT proof of authority to bind is missing	X		automatic rejection
12.	part bids (all items not bid)	X or	X	acceptable unless complete bid has been specified in the request
13.	bids containing minor clerical errors		X	2 working days to correct initial errors
14.	un-initialled changes to the request documents which are minor		X	2 working days to correct initial errors
15.	alternate items bid in whole or in part		X	available for further consideration unless specified otherwise in request
16.	unit prices in the schedule of prices have been changed but not initialled		X	2 working days to correct initial errors
17.	other mathematical errors which are not consistent with the unit prices		X	2 working days to correct initial corrections
18.	pages requiring completion of information by vendor are missing	X		automatic rejection
19.	bid documents which suggest that the bidder has made a major mistake in calculations or bid	X	X	consultation with a Solicitor on a case-by-case basis
20.	Bid qualified or restricted by a statement or alteration added to any part of the documents	X		Automatic rejection

21.	Bidder did not attend a mandatory site meeting.	X		automatic rejection
22.	RFP bids do not meet any defined mandatory requirements stated in the document.	X		automatic rejection