

BPS Procurement Directive Working Committee Checklist for Student Transportation

Additional Support for the Implementation of Procurement Policies* as they relate to Student Transportation

(*Procurement Policies = BPS Procurement Directive and School Boards' Procurement Policy)

The following checklist has been developed as a supplementary tool to be used in conjunction with the *BPS Procurement Directive*, the *BPS Procurement Directive Implementation Guide*, and the *BPS Procurement Directive Toolkit*. <http://www.fin.gov.on.ca/en/bpssupplychain/procurement.html>

NOTE: This checklist highlights best business practices and lessons learned from the RFP and two-stage pilot processes. It does not replace the *BPS Procurement Directive* and supporting BPS documents.

Planning Stage	<ul style="list-style-type: none"> <input type="checkbox"/> Begin planning well in advance of the need for service. Develop a business case. <input type="checkbox"/> Seek approval to proceed according to your established delegation of authority. <input type="checkbox"/> Consider providing publically available advance notice of upcoming procurement activities. <input type="checkbox"/> Identify the "Procurement Team" and the "Procurement Lead." <input type="checkbox"/> Review and leverage existing tools, templates and resources in support of student transportation competitive procurement. <input type="checkbox"/> Identify and leverage additional professional resources that may be required: Legal Support, Procurement Advisor, and Fairness Commissioner. <input type="checkbox"/> Where additional technical information is required (such as bundling/route bidding strategies, etc.), consider using formal information gathering processes such as a RFI or RFEI. <input type="checkbox"/> Determine the appropriate procurement option: RFT, RFQ, RFP, RFSQ, etc. <input type="checkbox"/> Consider your service area and value for money strategy early in the process. Analyze local market conditions, geography and desired business outcomes in your route distribution or bundles. <input type="checkbox"/> Establish appropriate contract caps to ensure a viable, sustainable competitive market place and reduce the potential for monopoly situations.
Development Stage	<ul style="list-style-type: none"> <input type="checkbox"/> Establish a clear timetable indicating the sequence of events for inclusion in the procurement document. <input type="checkbox"/> Due to the complexity of student transportation procurement, must consider providing proponents with a minimum response time of 30 calendar days. <input type="checkbox"/> Set clear evaluation criteria which must not discriminate or lead to preferential treatment of a supplier. <input type="checkbox"/> Review your route and financial information to determine the appropriate pricing components and structure for your procurement document. Conduct sensitivity analysis on these components to test financial impact and suitability. <input type="checkbox"/> Provide clear route information including vehicle specifications, any specific requirements, and pricing structure in the procurement document to support accurate price quotes, facilitate fair evaluation, and administer contract payment. <input type="checkbox"/> Ensure a tie bid process is clearly defined in competitive procurement documents. <input type="checkbox"/> Consider incorporating a <i>Certificate of Independent Bid Determination</i> in bid documents www.competitionbureau.gc.ca. <input type="checkbox"/> Ensure there is a comprehensive communications strategy in place – including operator information sessions – for responding to proponent questions. <input type="checkbox"/> Outline rules around communication during proposal evaluation. During the evaluation period (Closing Date to the End Date), Organizations must not communicate with suppliers on matters related to the competitive procurement process unless it is to seek clarification of a bid or notify the successful supplier.

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In Process	<input type="checkbox"/> All questions submitted by proponents should be responded to via addenda, including questions raised at information sessions. <input type="checkbox"/> Consider extending submission deadlines if an addendum impacts the initiative in a material way. <input type="checkbox"/> Ensure the evaluation process provides enough time for independent and team evaluations. <input type="checkbox"/> All evaluators should record detailed notes to support their evaluation score and to assist in the debriefing process. Records of evaluation scores must be kept for audit processes.
Contract Award	<input type="checkbox"/> Post contract award notification, in the same manner as the procurement documents were posted, after all agreements have been executed. <input type="checkbox"/> Provide all unsuccessful proponents with 60 calendar days following the date of the contract award notification to request a debriefing. Consider having the Procurement Lead conduct the debriefing. The Fairness Commissioner may participate but not conduct the debriefing.