

RESPONSIBLE PROCUREMENT GUIDE



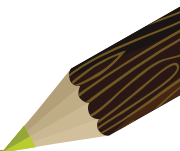
TABLE OF CONTENTS

| | |
|--|----|
| 1. INTRODUCTION | 3 |
| 2. GENERAL OBJECTIVES | 3 |
| 3. RESPONSIBLE PROCUREMENT | 4 |
| 4. ROLES AND RESPONSIBILITIES | 7 |
| 5. RULES AND PROCEDURES | 10 |
| APPENDIX A – SUMMARY TABLES..... | 18 |
| APPENDIX B – LIST OF PREFERRED SUSTAINABLE DEVELOPMENT CRITERIA..... | 21 |
| APPENDIX C – SUSTAINABLE DEVELOPMENT EVALUATION GRID | 24 |
| APPENDIX D – RESPONSIBLE PROCUREMENT DECISION CHECKLISTS | 27 |
| APPENDIX E – REFLECTION ON RESPONSIBLE PROCUREMENT DECISIONS..... | 31 |
| APPENDIX F – LIST OF RESPONSIBLE PROCUREMENT BIDDERS | 34 |
| APPENDIX G – EXCEPTIONS TO THE RESPONSIBLE PROCUREMENT GUIDE..... | 35 |
| APPENDIX H – RESPONSIBLE PROCUREMENT GUIDE DEFINITIONS | 36 |
| APPENDIX I – REFERENCE DOCUMENTS | 38 |

Figure 1 – The Seven Basic Principles of the City of Pointe-Claire’s Responsible Procurement Approach..... 5

Table 1 – Basic Principles of Sustainable Development..... 6

This guide supersedes all policies and directives prior to its adoption. This guide was approved by resolution no. 2018-651.



1. INTRODUCTION

In accordance with the *Cities and Towns Act* (sections 573 and 477.2) and the *By-law on contract management*, this guide applies to all procurement operations conducted for the City of Pointe-Claire.

It is therefore useful for municipal employees, bidders and all public office holders of City to be informed of guidelines governing procurement operations.

This guide was prepared to meet the following needs:

- 1.1 Disseminate the *By-law on contract management* that regulates municipal procurement.
- 1.2 Increase awareness of the *Responsible Procurement Guide* that supports enforcement of the *By-law on contract management* and the main regulations that everyone must observe.
- 1.3 Facilitate access to the procurement system for municipal departments and public office holders.

2. GENERAL OBJECTIVES

The main objective is to reassure taxpayers that money spent on any type of procurement, regardless of the nature or the amount involved, is spent according to specific rules, consistent with the principles of sound administration and sustainable development.

This guide was created to:

- 2.1 Enable the City to make purchases at optimal prices and under the best possible social and environmental conditions, taking into account requirements expressed by municipal departments and market availability.
- 2.2 Clarify and establish procurement rules and standards.
- 2.3 Define the roles and responsibilities of the City's municipal departments.
- 2.4 Inform City staff and public office holders of mandatory procurement rules and standards.
- 2.5 Provide a framework for fair and honest relationships with the City's bidders and successful bidders.
- 2.6 Encourage municipal departments to use goods and services wisely and effectively, with a constant focus on savings and the three pillars of sustainable development: environmental, social and economic considerations.
- 2.7 Frame procurement needs to make them meet the three pillars of sustainable development as much as possible.
- 2.8 Ensure the functional and flexible centralization of procurement operations and all information relating to procurement for municipal departments.
- 2.9 Ensure compliance with laws and by-laws governing the City.
- 2.10 Encourage free market competition between bidders.
- 2.11 Where possible, prioritize procurement at the City through group purchases with other public bodies when this provides economies of scale.
- 2.12 Allow routine searches for bidders with the greatest expertise, including in sustainable development.
- 2.13 Standardize rules and procedures, as well as terminology, to establish a common procurement language. In this regard, the definitions of terms used in this document are listed in **Appendix H**.
- 2.14 Promote accountability based on proper use of public funds in City procurement.

3. RESPONSIBLE PROCUREMENT

Responsible procurement is an acquisition method that integrates environmental and social criteria into procurement processes (goods, service delivery or project implementation) in an effort to minimize environmental impacts, increase social benefits and strengthen the economic sustainability of organizations throughout the lifecycles of the products¹.

Sustainable development must be taken into consideration on a routine basis and help reduce the City's ecological footprint, boost the local economy, integrate socially disadvantaged or disabled people, and ensure long-term sustainable economic management. These ambitions are achieved not only by reducing the use of non-renewable raw materials and production of landfill waste and greenhouse gas emissions, but also by buying locally or selecting suppliers who provide jobs for individuals with limited employment opportunities or disabilities, or by reviewing associated costs throughout the useful life of the products or services. The City of Pointe-Claire wants to minimize needs at source and take into consideration the reduction, reuse, recovery, recycling, disposal of residual materials (4R-D principle) and reclamation in the procurement process.

¹ Adaptation of the definition of the Sustainability Purchasing Network, cited in Espace de concertation sur les pratiques d'approvisionnement responsable (ECPAR), 2008.

Figure 1 – The Seven Basic Principles of the City of Pointe-Claire’s Responsible Procurement Approach

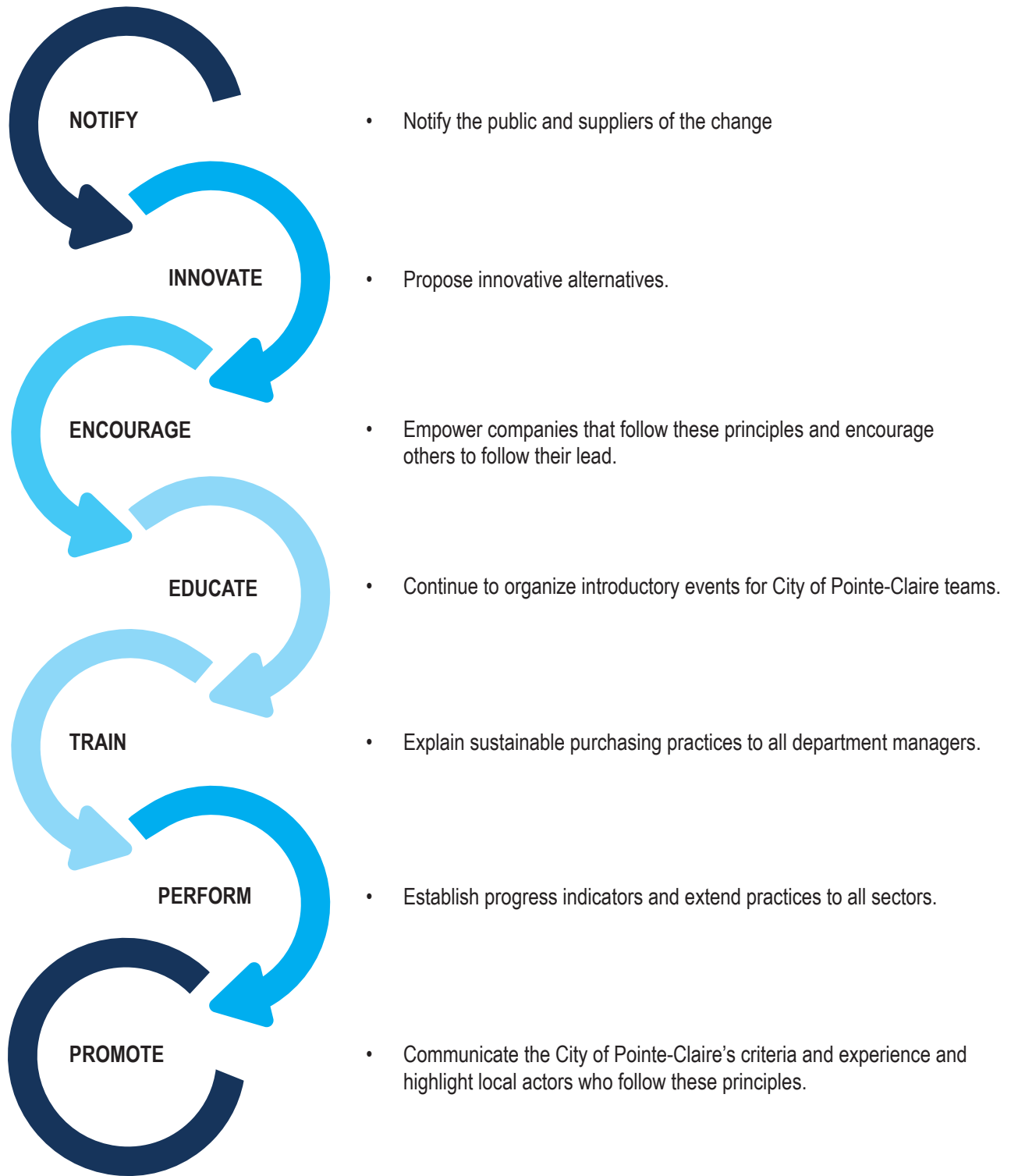


Table 1 – Basic Principles of Sustainable Development

| Environmental aspect | Economic aspect | Social aspect |
|--|--|--|
| <ul style="list-style-type: none"> a. Procurement is based on a real need. b. Research has been done to find the product that best matches the need. c. The product is created locally. d. Packaging is minimal or recyclable. e. The bidder has adopted environmental practices (International Organization for Standardization (ISO), carbon footprint reduction). f. The product is made of reused or recycled materials. g. The product can be reused or recycled at end-of-life. h. The bidder is able to recover the product at end-of-life. | <ul style="list-style-type: none"> a. Procurement is in the interest of the City. b. The cost takes the useful life of the product into account. c. Procurement helps to create or maintain jobs locally. d. The product is reusable. e. The bidder uses innovative approaches and designs to minimize the economic impact. | <ul style="list-style-type: none"> a. Research has been done to verify that local bidders are not able to provide us with the product we need. b. The bidder supports social reintegration or hires persons with disabilities. c. The product is fair. d. The bidder has set up a Workplace Health and Safety (WHS) Program. |

3.1 In order to fulfill its responsible procurement vision, at equal prices and conditions, the City will award a contract to the successful bidder who follows the most principles of sustainable development².

3.2 In its *By-law on contract management (Appendix I)*, the City also adopted two preference clauses, sections 25 and 26, to fulfill its responsible procurement vision:

25. Local procurement preference clause

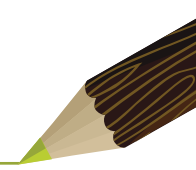
The municipality may award a negotiated contract to a local successful bidder that has not necessarily submitted the lowest price, provided that, with at least equivalent quality, its bid is not more than 10% higher than the best price submitted by a bidder outside the municipality for contracts worth \$49,999.99 (taxes included) or less and 5% higher than the best price for contracts worth between \$50,000 and \$99,999.99 (taxes included)³.

Local purchase: Purchase of a good or service created or provided locally, based on the following order of priority:

- City of Pointe-Claire*
- Island of Montréal*
- Province of Québec*
- Canada*
- North America*

² See Appendices B and C.

³ PC-RO-257, section 23.



26. Sustainable procurement preference clause

The municipality may award a negotiated contract to a successful bidder that has sustainable development qualifications and has not necessarily submitted the lowest price, provided that, with at least equivalent quality, its bid is not more than 10% higher than the best price submitted by a bidder that does not have such qualifications or whose bid is not accompanied by a document proving that it has such qualifications for contracts worth \$49,999.99 (taxes included) or less and 5% higher than the best price for contracts worth between \$50,000 and \$99,999.99 (taxes included)⁴.

4. ROLES AND RESPONSIBILITIES

4.1 MATERIAL AND CONTRACT RESOURCES

Role

- 4.1.1 Perform procurement transactions needed to meet the requirements of municipal departments, taking into account quality standards, quantities, deadlines and delivery conditions and after-sales service sought by municipal departments, at the best price and most advantageous terms possible, while maintaining honest and impartial relationships with bidders and the successful bidder, and promoting use that does not hinder optimal sustainable development of existing goods and services.
- 4.1.2 Obtain the information required to effectively manage contracts and communicate the information to municipal departments.
- 4.1.3 Provide administrative or other support to municipal departments in identifying their needs and developing their projects and areas of activity for all procurement matters.
- 4.1.4 Inform municipal departments, the public, current bidders and successful bidders of the existence of the *Responsible Procurement Guide*; encourage them to adopt a similar approach and propose innovative alternatives based on the stated principles of sustainable development.

Responsibilities

Material and Contract Resources are responsible for the application of this *Responsible Procurement Guide*. They may recommend adjustments and additions to keep it up to date, as required.

- 4.1.5 Supply municipal departments fairly based on their needs and budgets, in accordance with existing laws as well as City priorities and guidelines.
- 4.1.6 Provide City Council, senior management and municipal departments with all relevant and necessary information regarding costs and procurement terms.
- 4.1.7 Maintain close ties with municipal departments, so that purchases reflect their respective expertise and real needs.
- 4.1.8 Manage and control business connections and relationships with the City's bidders and successful bidders.

⁴ PC-RO-257, section 24.

- 4.1.9 Manage contentious situations or potential premature end-of-contract situations with municipal departments, in consultation with the Finance Department, Legal Affairs Department, Communications and the City Clerk.
- 4.1.10 Update and monitor inventories required by the City.
- 4.1.11 Update this guide, information on municipal departments, bidders, successful bidders and the City's procurement process.
- 4.1.12 Develop, standardize, produce and update all forms, reference documents and tools used by the City as part of the application of this guide.
- 4.1.13 Ensure the municipal departments, their agents, their public office holders and City staff comply with this guide.
- 4.1.14 Write estimates, specifications and the call for tenders (instructions to bidders, bid form including the price schedule, contract and appendices) in conjunction with municipal departments.
- 4.1.15 Process purchase requisitions, requests for quotations and calls for tender. In this regard, Material and Contract Resources must provide procurement statistics and constantly seek to optimize financial and material resources.
- 4.1.16 Ensure compliance with the rules governing the awarding of contracts by using a bid weighting and evaluation system.
- 4.1.17 Monitor warranties, bonds and insurance upon awarding the contract.
- 4.1.18 Ensure that the City has no obligations and assumes no liability with regard to bidders, even the lowest bidder, as long as a contract has not been duly awarded by City Council and a duly authorized purchase order, in accordance with instructions, has not been produced.
- 4.1.19 Sustainably dispose of inactive or obsolete materials following the 4R-D principle. These materials can be returned to the bidder for a credit or exchange, auctioned, sold privately or donated to non-profit organizations, for example.
- 4.1.20 Keep up with all information on supplies providing the best quality-price ratio in accordance with the sustainable development criteria mentioned above.
- 4.1.21 Participate in the annual review of this guide.



4.2 MUNICIPAL DEPARTMENTS

Role

Assess their needs taking into account the environmental, ethical, economic and social risks associated with them. Provide Material and Contract Resources with an estimate and related expert report on their short-, medium- and long-term procurement requirements, within the timeframes set out in this guide.

Responsibilities

- 4.2.1 Know and comply with the requirements of this guide and the *By-law on contract management* and any other legal obligations in the performance of their duties.
- 4.2.2 Conduct sustainable development research and analysis with respect to identified needs⁵ through market reviews or notices of interest. If necessary, contact the Environment and Sustainable Development Department.
- 4.2.3 Plan their procurement needs to ensure service continuity for the City. Provide the required quality and quantity.
- 4.2.4 Consult Material and Contract Resources on the procurement strategy that best suits their needs.
- 4.2.5 Provide the necessary information and establish the adjusted procurement cost.
- 4.2.6 Once the most sustainable approach has been identified, provide an estimate containing an accurate description of their needs for materials, supplies, equipment or services, for which Material and Contract Resources will have to initiate a procurement process.
- 4.2.7 Establish a schedule and specify the date when the procurement is required, as well as the delivery location, and plan all the foregoing in conjunction with Material and Contract Resources.
- 4.2.8 Complete a purchase requisition to release the necessary procurement budgets.
- 4.2.9 Use the procurement tools available to them.
- 4.2.10 When preparing a call for tenders, provide the technical specifications and the sustainable development analysis in accordance with the established schedule.
- 4.2.11 Confirm receipt of products or services to ensure they match the quantities and quality requested.
- 4.2.12 Manage awarded contracts. Inform Material and Contract Resources as soon as possible of any change in varieties or quantities consumed that changes the nature of the contract.
- 4.2.13 Oversee the contract, bonds and warranties after the contract has been awarded.

⁵ **Appendices E and F** as well as **Appendices B, C and D** of this guide are available to municipal departments to guide them in this research.

4.3 ENVIRONMENT AND SUSTAINABLE DEVELOPMENT DEPARTMENT

Role

Provide advice and guidance to municipal departments that want to opt for responsible procurement.

Responsibilities

- 4.3.1 Know and comply with the requirements of this guide and the *By-law on contract management* and any other legal obligations in the performance of their duties.
- 4.3.2 Provide municipal departments with support for the sustainable development analysis in accordance with the established schedule.
- 4.3.3 Provide municipal departments with all accurate, relevant and necessary information on sustainable development.
- 4.3.4 Participate in the annual review of this guide.

5. RULES AND PROCEDURES

All rules and procedures in this guide are subject to the laws and by-laws that govern the City. This guide may not be amended, in whole or in part, without the approval of City Council.

5.1 PROCUREMENT PROCESS BASED ON VALUE OF EXPENDITURE

- 5.1.1 Expenditures submitted under section 573 of the *Cities and Towns Act (CTA)*. These expenditures follow the process described in the *By-law on contract management*. **Table No. 1 in Appendix A** provides a brief summary of the thresholds.
- 5.1.2 Exceptions set out in the *Cities and Towns Act (section 573.3)* and the *By-law on contract management*. **Appendix G** provides a brief summary of the thresholds. A business case must be prepared in order to qualify for an exception.
- 5.1.3 Expenditures permitted in negotiated contracts by request for quotations. **Table No. 2 in Appendix A** provides a brief summary of the thresholds.

5.2 PROCUREMENT PLANNING

5.2.1 Preparatory analysis

Prior to implementation, all City procurement projects must undergo a needs analysis, including required quantities, and must have obtained the necessary budget.

This analysis is usually performed in the following cases:

- a) Budget preparation for the Three-Year Capital Investment Program (CIP)
- b) Annual budget preparation
- c) Unbudgeted specific needs

Material and Contract Resources help municipal departments conduct their preparatory analysis, by producing notices of interests, market reviews, requests for quotations or calls for tender on the open market.

5.2.2 Non-recurring project planning

Non-recurring project planning is based on the “Three-Year Capital Investment Program” budget document, which is usually adopted in the fall of the year preceding procurement planned for this budget.

5.2.3 Accountability

Every year, on or about January 30, Material and Contract Resources post the accountability records on the City’s website for the fiscal year ending December 30. These records are “Contracts involving an expenditure of \$25,000 and over” and “Contracts of over \$2,000 involving a total expenditure of over \$25,000.”

5.2.4 Recurring project planning

Based on the accountability records, the GRM software package is used to update the contract log, and a contract log is produced for the City. This contract log is kept up-to-date in the GRM software package. This log, which is used to plan calls for tenders, is available for all municipal departments and includes:

- a) The contract tender number;
- b) Title of the call for tenders;
- c) Identity of the successful bidder;
- d) Value of the contract;
- e) Duration of the contract;
- f) Contract renewal deadlines;
- g) Contract expiry date.

Calls for tenders for recurring procurement needs are planned based on this log, in conjunction with municipal departments.

When calls for tenders are issued, a schedule is sent to the municipal departments concerned.

The contract log is sent at least once a year to the City Manager, the treasurer and municipal departments.



5.3 PROCUREMENT MANAGEMENT PROCESS

The City procurement process is as follows:

- a) Municipal departments prepare their purchase requisitions or requests for goods and services.
- b) Material and Contract Resources issue requests for quotations or a call for tenders.
- c) Material and Contract Resources review and validate bids received under the competitive bidding process and make a recommendation to municipal departments.
- d) The municipal departments accept or reject these recommendations (in case of rejection, return to step a) of this paragraph).
- e) Material and Contract Resources ask the municipal departments to obtain the financial authorizations required prior to production of purchase orders under the *By-law respecting delegation of power (Appendix I)*.
- f) After having obtained the required financial authorizations, Material and Contract Resources send the purchase orders to the successful bidders.
- g) Material and Contract Resources follow up with the successful bidders in tracking orders.
- h) Material and Contract Resources receive the invoices from the successful bidders after the need has been met.
- i) Material and Contract Resources distribute the invoices received to municipal departments for signed confirmation that the need has been met.
- j) Municipal departments promptly return duly signed invoices to confirm receipt of goods or services.
- k) Material and Contract Resources receive the invoice in GRM and send the invoice to Accounts Payable for payment.
- l) Accounts Payable pays the invoices within the applicable payment term.
- m) Where applicable, municipal departments dealing with returns, refusals or procurement issues notify Material and Contract Resources. Material and Contract Resources work with municipal departments to find a solution.



5.4 PURCHASE REQUISITIONS OR REQUESTS FOR GOODS AND SERVICES

After ensuring that budget funds are available for their needs, municipal departments must complete a purchase requisition in the GRM system and have it approved in accordance with the City's *By-law respecting delegation of power* (**Appendix I**).

The purchase requisition contains at least the following information:

- a) Name of municipal department;
- b) Date of purchase requisition;
- c) Description of needs or specifications for goods;
- d) Quantities required;
- e) Budget item;
- f) Estimated value;
- g) Date required.

5.5 REQUEST FOR QUOTATIONS

Material and Contract Resources issue a request for quotations following the procedure outlined in **Table No. 2 of Appendix A** of this document.

If the response to the request for quotations meets the needs and conditions listed on the purchase requisition, Material and Contract Resources produce the purchase order in accordance with the *By-law respecting delegation of power* (**Appendix I**).

If the result differs significantly from the needs indicated, the municipal departments are informed and must decide whether to accept or reject the quotation.

5.6 CALLS FOR TENDERS

With the exception of technical specifications, which can be prepared by professional service contractors that the City has hired as public office holders, all bid documents are prepared by Material and Contract Resources in conjunction with municipal departments. The format and content of bid documents are standardized in the City's EDILEX bidding platform.

5.6.1 Tender notices

Material and Contract Resources are responsible for preparing and publishing tender notices for the City as a whole and act as interlocutors throughout the bidding process.

5.6.2 Tender notices, instructions to bidders, bid form, specifications, contract and appendices

These documents are prepared in accordance with the division of responsibilities in Table 2:

Table 2 – Responsibilities Outlined in the Bid Documents

| Document | | Responsibility |
|----------|--|--|
| 1. | Tender notices | <ul style="list-style-type: none"> • Material and Contract Resources |
| 2. | Instructions to bidders, including administrative clauses: <ul style="list-style-type: none"> • General • Special | <ul style="list-style-type: none"> • Material and Contract Resources • Material and Contract Resources and municipal departments |
| 3. | Specifications, including technical clauses: <ul style="list-style-type: none"> • General • Special, as well as drawings | <ul style="list-style-type: none"> • Municipal departments |
| 4. | Bid form | <ul style="list-style-type: none"> • Material and Contract Resources |
| | Price schedule appendix | <ul style="list-style-type: none"> • Municipal departments |
| | Administrative appendix Warranties appendix Insurance appendix | <ul style="list-style-type: none"> • Material and Contract Resources |
| 5. | Addenda | <ul style="list-style-type: none"> • Material and Contract Resources send questions received to municipal departments. • Municipal departments review the question and send their response to Material and Contract Resources. • Material and Contract Resources publish and send the addenda to the bidders. |

5.6.3 Distribution of bid documents

Material and Contract Resources are solely responsible for distributing bid documents through the Government of Quebec Electronic Tendering System (SEAO).

5.6.4 Addenda

Material and Contract Resources send bidders the addenda via the SEAO system, which serves as a registry. Also, Material and Contract Resources act as the file manager when a call for tenders is published.



5.6.5 Receipt of bids

When a call for tenders is issued, only bids requested and received by Material and Contract Resources are considered valid.

Public bids are filed in opaque sealed envelopes, at the City Hall front desk. Each filed bid envelope is stamped with the date and time of the filing by the City Hall receptionist or the receptionist at the location indicated in the tender notice. The envelopes are immediately stored in one safe location.

5.6.6 Opening of bids

Material and Contract Resources are solely responsible for opening bids.

In the case of public bids, following the opening of bids, a copy of the opening minutes will be sent to:

- a) The Legal Affairs Department;
- b) The City Manager;
- c) The municipal departments concerned.

The original remains with Material and Contract Resources.

A copy of each bid received is sent to the municipal departments. Material and Contract Resources retain the original copy of all bids.

5.6.7 Compliance review and price verification

Material and Contract Resources are responsible for reviewing whether bids comply with administrative requirements.

Municipal departments are responsible for reviewing whether bids meet technical requirements and whether the bidders' price schedules are compliant.

5.6.8 Recommendation report based on a business case prepared using the SGD to award a contract.

Municipal departments prepare a business case for all contracts awarded by tender. As stakeholders, they ask Material and Contract Resources to document the compliance of the process.

This recommendation report must be approved by the municipal departments, Material and Contract Resources, the treasurer and the City Clerk if necessary, and then submitted for final approval to the City Manager.

This recommendation report, duly signed by all parties, must be submitted to City Council. Following submittal of the report and approval by City Council, a resolution is adopted to award the contract or reject the bid.

5.6.9 Rejection of bids and issuing a new call for tenders

The rejection of all bids from a call for tenders is an exceptional measure that should be used judiciously. This measure must be the subject of a recommendation report based on a business case prepared using the SGD.

This recommendation report must be approved by the municipal departments, Material and Contract Resources, the treasurer and the City Clerk if necessary, and then submitted for final approval to the City Manager.

This recommendation report, duly signed by all parties, must be submitted to City Council. Following submittal of the report and approval by City Council, a resolution is adopted to cancel the call for tenders or reject all bids.

If after all bids have been rejected, a new call for tenders is issued, the recommendation report from the business case must describe the rationale for this decision and nature of the amendments.

5.6.10 Responses to bidders

The results for all bids received are posted on SEAO within 15 days of awarding the contract.

When bid securities are submitted (by certified cheque), they are accompanied by a written response, if applicable, based on the nature and conditions of the call for tenders.

The bidder receives a written response indicating whether their bid was successful.

5.6.11 Ratification of contracts

Bid documents are considered contract documents.

5.7 ISSUING PURCHASE ORDERS

Purchase orders must be issued by Material and Contract Resources for City procurement purposes.

As part of normal City operations, Material and Contract Resources complete and issue purchase orders to contractors. An order constitutes a formal financial commitment to a successful bidder.

Outside office hours, for emergencies that require immediate procurement, a series of order numbers are reserved for municipal departments, which issue purchase orders the instructions and format determined by Material and Contract Resources.

5.8 PURCHASES MADE WITH PETTY CASH AND PROCUREMENT CARDS

Procurement of certain supplies can be made with petty cash or prepaid procurement cards. However, use of petty cash or prepaid procurement cards is exceptional and is essentially a stop-gap solution in operations.

5.9 CREDIT CARD PURCHASES

Credit card purchases are exceptional and are essentially a stop-gap solution. This clause supersedes any policies or directives in this regard.

5.10 RECEIPT OF GOODS OR SERVICES

A document signed by the City (bill of lading, invoice, worksheet, progressive remittance slip, emails from municipal departments or invoices) must confirm receipt of goods or services by municipal departments and must be forwarded immediately to Material and Contract Resources.

Goods or services are received during office hours, unless otherwise specified by municipal departments.

5.11 RETURN OF GOODS AND REJECTION OF SERVICES

If after receipt, goods or services are found to be defective, flawed or do not comply with the purchase order and contract, they must be returned to the successful bidder or rejected for an exchange, credit claim or refund.

5.12 WARRANTY MANAGEMENT

Municipal departments are responsible for warranties and bonds once the contract has been awarded.

5.13 PAYMENT OF GOODS AND SERVICES

Invoices are usually paid within thirty (30) calendar days from the date the invoice was received.

5.14 INVENTORY MANAGEMENT

Material and Contract Resources are responsible for managing City inventories. In conjunction with municipal departments, they coordinate inventory management operations.



APPENDIX A – SUMMARY TABLES

Table No. 1: Expenditures Covered by the *Cities and Towns Act* (sections 573 and following)

| No. | Type of contract | Amount of the expenditure | |
|-----|---|--|---|
| | | From \$25,000 to less than \$101,100 | \$101,100 or more |
| 1 | Insurance contract | Bid by invitation (minimum deadline of 8 days) | Public bid: Notice in a newspaper and SEAO (minimum deadline of 15 days) |
| 2 | Contract for the performance of construction work | Bid by invitation (minimum deadline of 8 days) Bid weighting and evaluation system | Public bid: Notice in a newspaper and SEAO (minimum deadline of 15 days) Bid weighting and evaluation system |
| 3 | Contract for the supply of equipment or materials | Bid by invitation (minimum deadline of 8 days) | Public bid: Notice in a newspaper and SEAO (minimum deadline of 15 days) |
| 4 | Service contract | Bid by invitation (minimum deadline of 8 days) Bid weighting and evaluation system | Public bid: Notice in a newspaper and SEAO (minimum deadline of 15 days) Bid weighting and evaluation system |
| 5 | Professional services contract | Bid by invitation (minimum deadline of 8 days) Bid weighting and evaluation system | Public bid: Notice in a newspaper and SEAO (minimum deadline of 15 days) Bid weighting and evaluation system |



Table No. 2: Quotation Request Procedure

| No. | Types of requests | Amount of the expenditure | |
|-----|--------------------------------|-------------------------------|------------------------------------|
| | | From \$0 to less than \$5,000 | From \$5,000 to less than \$25,000 |
| 1 | Direct order | As required and with reserve | In emergency situations only |
| 2 | Verbal request for quotations | As required and with reserve | In emergency situations only |
| 3 | Written request for quotations | YES | YES |

Table No. 3: Sustainable Development Tools for Responsible Procurement

| Procurement | Sustainable development tools |
|-------------------------------|--|
| Standard purchase requisition | APPENDIX B – List of preferred sustainable development criteria (MANDATORY) |
| | APPENDIX C – Sustainable development evaluation grid (MANDATORY) |
| Negotiated contract | Appendix D – Responsible procurement decision checklists |
| Call for tenders | Appendix E – Reflection on responsible procurement decisions |
| | Appendix F – List of responsible procurement bidders |

Table No. 4: 4R-D Principle and Lifecycle Concept

| | |
|----------------------------|--|
| Reduce | Question your habits by reviewing the real need to make the procurement. Decrease supply of products and limit consumption of resources. |
| Reuse | Give equipment a second life or purchase used or refurbished equipment. |
| Recover and recycle | Bring an end-of-life item to appropriate facilities that can process it, and use a product made of non-virgin raw materials. |
| Reclaim | Recover energy produced by chemical transformation of matter. |
| Dispose | If the product cannot be recycled or reclaimed, ensure that it is properly and safely dismantled prior to disposal in an engineered landfill site. |

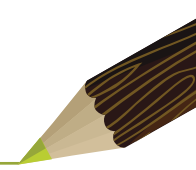
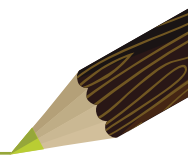


Table No. 4a: 4R-D Principle and Lifecycle Concept

| | |
|--|---|
| <p>Reduction: Reduction at source involves a choice: either not consuming or limiting waste. We must identify our needs before buying, because the best waste is waste that is not generated!</p> | <ul style="list-style-type: none"> • Use videoconferencing instead of driving to a meeting. • Buy in bulk rather than individual packages. • Buy concentrated rather than diluted products. • Read documents on the screen instead of printing them. • Rent goods that you use occasionally instead of buying them. • Buy the right amount instead of stocking up. |
| <p>Reuse: Reusing a consumer item can extend its life without changing its appearance.</p> | <ul style="list-style-type: none"> • Retreading tires. • Reusing office furniture instead of buying new items. • Repurposing material. |
| <p>Recovery and recycling: Recovery involves collecting and selecting materials to be recycled, i.e. processed in a plant and then used to manufacture another product.</p> | <ul style="list-style-type: none"> • Metals such as steel, copper, lead and aluminum can be sold to recyclers for processing. • Vehicles may be sold to licenced automobile recyclers that are members of the Association des recycleurs de pièces d'autos et de camions (ARPAC). • Street furniture can be made from recycled plastic bottles. • Furniture can be made from diseased trees that need to be cut down (ash trees). |
| <p>Reclamation: Reclamation involves recovering energy produced by chemical transformation of matter. Residues can be used to produce energy or composted to produce soil amendments.</p> | <ul style="list-style-type: none"> • Oversized tires can be sold to cement plants, where they are converted into energy. • Composting green waste with microorganisms produces very good potting soil. • Burning biogas from landfill sites produces electricity. |
| <p>Disposal: Landfilling or incinerating residual materials that cannot be reclaimed.</p> | <ul style="list-style-type: none"> • According to the 4R-D principle, disposal (landfilling or incineration) is the last resort (RECYC-QUÉBEC, 2007). |



APPENDIX B – LIST OF PREFERRED SUSTAINABLE DEVELOPMENT CRITERIA

The following sustainable development criteria are preferred in City calls for tenders, depending on the types of needs. Minimum requirements to be included in calls for tenders are preceded by the abbreviation “ER” meaning “expenditure review” in the text below.

PROCUREMENT CONTRACT

ENVIRONMENTAL ASPECT

- **ER – Procurement meets a real need.**
- **ER – Research has been done to find the product that best matches the need (by an expert in the field).**
- **ER – The product is created locally, and if this is not possible, research has been done to verify that local bidders are not able to provide us with the product we need.**
- Packaging is minimal or recyclable.
- The bidder follows environmental practices (ISO standards, carbon footprint reduction).
- The product is made of recycled materials.
- The product can be recycled at end-of-life.
- The bidder is able to recover the product at end-of-life.
- The product has a small ecological footprint during production, use and disposal.
- The product parts can be (easily) replaced in case of breakage.
- The product has a long life, is rechargeable (if applicable) and is easy to recycle at end-of-life.
- The product is (partly) made from used parts.
- The product is (partly) made from recycled materials.
- The product meets environmental performance standards (certification attached).
- The product is not overpackaged. If it is, the packaging is recyclable and the company takes it back.
- Production does not involve any compounds that are toxic or harmful to humans or nature (heavy metals, volatile organic compounds (VOCs), etc.).
- The product consumes little energy when used.
- The product is electric (if possible).
- The product contains less than 10 ppm of formaldehyde (if applicable).

SOCIAL ASPECT

- **ER – Procurement helps to create or maintain jobs locally, and if this is not possible, research has been done to verify that local bidders are not able to provide us with the product we need.**
- The bidder supports social reintegration or hires persons with disabilities.
- The product is fair.
- The bidder has set up a Workplace Health and Safety (WHS) Program.
- The bidder follows environmental practices (ISO standards, carbon footprint reduction).
- The product meets social performance standards (certification attached).

ECONOMIC ASPECT

- **ER – Procurement is in the interest of the City.**
- The product lifecycle cost (LCC) is comparatively low.
- Procurement helps to create or maintain jobs locally.
- The product is reusable.
- The bidder uses innovative approaches and designs to reduce costs.
- Production and materials are local (proof of traceability attached).
- Quantities have been thoroughly studied and do not exceed current needs.

CONSTRUCTION CONTRACT

ENVIRONMENTAL ASPECT

- **ER – Construction waste is managed to maximize reuse and recycling (plan attached).**
- **ER – Procurement helps to create or maintain jobs locally, and if this is not possible, research has been done to verify that local bidders are not able to provide us with the product we need.**
- The bidder follows environmental practices (ISO standards, carbon footprint reduction).
- The service provider has completed one or more certified projects in the past (LEED certification, BOMA-BEST certification, Passivhaus certification, etc.).
- Materials are branded or certified sustainable (certification attached).
- Wood is preferred in construction or renovation.
- The service provider follows the 4R-D principle for site residues.
- Product parts can be (easily) replaced in case of breakage.
- The product is made of recycled materials.
- The product has a long life and is easy to recycle at end-of-life.
- Some of the materials are reused or recycled.
- The product or service meets environmental performance standards (certification attached).
- Production and materials are (partly) local (proof of traceability attached).
- Production does not involve any compounds that are toxic or harmful to humans or nature (heavy metals, VOCs, etc.).
- The service provider uses biodegradable products, if possible.
- The project has a small ecological footprint.

SOCIAL ASPECT

- Practices towards employees are certified or branded sustainable (certification attached).
- The product or service meets social performance standards (certification attached).
- The bidder supports social reintegration or hires persons with disabilities.

ECONOMIC ASPECT

- The product lifecycle cost is comparatively low.
- The contract helps to create or maintain jobs locally.
- The contractor uses innovative approaches and designs.

SERVICE CONTRACT

ENVIRONMENTAL ASPECT

- The company procures its supplies responsibly in accordance with the same criteria used by the City OR in accordance with its own criteria (list of criteria attached).
- The company and its departments have a small overall ecological footprint.
- The company utilizes reused or recycled materials.
- The company does not use oxodegradable, degradable or biodegradable plastics.
- The company meets environmental performance standards (certification attached).
- The project has a small ecological footprint in terms of service delivery and use.
- The company does not use VOCs.
- The service integrates, values and promotes biodiversity, if possible.
- The service provider uses biodegradable products, if possible.
- Plants are perennial rather than annual, native rather than exotic, if applicable.
- Fertilizers are free of synthetic chemicals, if applicable.

SOCIAL ASPECT

- The company meets social performance standards (certification attached).
- The company hires staff to support their social reintegration.

ECONOMIC ASPECT

- The service lifecycle cost is comparatively low.
- The service helps to create or maintain jobs locally.
- The company uses innovative approaches and designs.



APPENDIX C – SUSTAINABLE DEVELOPMENT EVALUATION GRID

CATEGORIES

- Goods (Supplies)
- Goods and services
- Turnkey solutions (High tech)
- Technical services
- Professional services
- Professional services related to construction
- Construction (Buildings or others)
- Construction (Roads)

ENVIRONMENTAL COMMITMENT

1. Does your company follow a sustainable development policy or plan? YES NO

2. Does your company hold one or more environmental certifications? YES NO

If so, list them:

3. Does your company take steps to limit environmental risks (water management, waste management, pollution reduction, certified products)? YES NO

If so, what steps is your company taking?

4. Does your company have an environmental approach that exceeds statutory requirements? YES NO

If so, describe it:

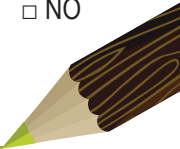
5. Does your company avoid using non-essential synthetic chemicals in its processes? YES NO

6. Does your company publish a report of its sustainable activities? YES NO

SOCIAL COMMITMENT

7. Does your company take steps to ensure health and safety at work? YES NO

If so, does the company have a written prevention program? YES NO



8. Does the company provide occupational health and safety training for its employees? YES NO

9. Does your company employ people to support their social or professional reintegration? YES NO

If so, what is the percentage of these people in the company? _____%

10. Does your company employ people with disabilities? YES NO

If so, what is the percentage of these people in the company? _____%

11. Does your company know the supply chains of products sold or used and does it comply with minimum labour standards (International Labor Organization) at the various stages of the supply chains? YES NO

12. Does your company have a social approach that exceeds statutory requirements? YES NO

If so, provide details:

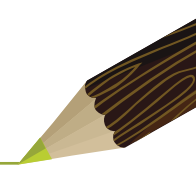
13. Does your company encourage its employees to follow the principles of sustainable development? YES NO

If so, how?

ECONOMIC COMMITMENT

14. Does your company invest in an ecologically or socially responsible economy? YES NO

If so, how?



APPENDIX D – RESPONSIBLE PROCUREMENT DECISION CHECKLISTS

PAPER

MEASURES

- The City is committed to minimizing the environmental impacts of paper use.
- Employees will have to reduce the amount of printing paper they use. The various City departments will discuss the need to print certain documents.
- From a legal standpoint, if some documents are to be retained in paper format, they will only be printed once for archival purposes.
- The default configuration for all printers on user workstations must be black and white double-sided printing.
- Minimize individual printers as much as possible.

PROCUREMENT CRITERIA

- Require (with the exception of proven technical incompatibility) 100% recycled paper certified by the FSC (Forest Stewardship Council).
- Require (with the exception of proven technical incompatibility) paper that is bleached without chlorine or chlorine compounds bearing the PCF (Processed Chlorine Free) or TCF (Totally Chlorine Free) label.
- Select paper free from chemicals that pose health and environmental risks.
- Exclude dyes containing heavy metals (e.g. lead, nickel, cadmium, mercury).

OFFICE SUPPLIES

MEASURES

- The City is committed to minimizing the amount of office supplies not only by encouraging reuse and promoting sustainable products, but also by centralizing supplies to limit inventory.

PROCUREMENT CRITERIA

- Require bidders to pick up excess packaging.
- Prioritize items that are in the City's list of recommendations.
- Prioritize environmentally certified products.
- Prioritize heavy duty items with a long life.
- Prioritize rechargeable items and inform employees.
- Prioritize items that are easy to recycle at end-of-life.
- Give exclusive priority to paper or cardboard items with FSC certification and items bleached without chlorine bearing the PCF or TCF label.
- Prioritize items made from recycled plastic.
- Prioritize plastic items made from polyethylene or polypropylene and avoid polyvinyl chloride (PVC).
- Prioritize water-based glues and inks.
- Prioritize items that are not overpackaged.
- Exclude items containing heavy metals (e.g. lead, nickel, cadmium, mercury).
- Exclude all items made from tropical wood.

VEHICLES AND EQUIPMENT

MEASURES

- The City undertakes to discuss the upstream requirements of each procurement need. When procurement is required, municipal departments, in conjunction with the Rolling Stock and Workshops Division, will have to consider vehicle maintenance costs. Prioritize sharing vehicle fleet resources to limit procurement for individual needs.

GASOLINE-POWERED VEHICLES

- Prioritize new light-duty automobiles bearing an EnerGuide label with a carbon dioxide rating greater than 7.
- Prioritize new light-duty trucks bearing an EnerGuide label with a carbon dioxide rating greater than 5.
- Prioritize second-hand vehicles whose carbon dioxide emissions are closest to these ratings.
- Prioritize vehicles that do not use gasoline.

DIESEL-POWERED VEHICLES

- When procuring vehicles, require that they bear a certificate indicating that they meet the 2010 Environmental Protection Agency (EPA) standard.
- When procuring diesel vehicles, require that they be equipped with a selective catalytic reduction system.

EQUIPMENT AND TOOLS

- Require bidders to properly dispose of batteries for electrical equipment at end-of-life.
- Prioritize equipment limiting noise and require a maximum of 90 dB(A) for vehicle fleet equipment.
- Prioritize electric tools, if possible.

INDOOR FURNITURE

MEASURES

- Where possible, the City undertakes to reuse furniture in order to limit procurement of new products. Disposal of furniture at end-of-life must be taken into account from the time of procurement so that the product can be reclaimed.

PROCUREMENT CRITERIA

- Require bidders to pick up excess packaging.
- Prioritize furniture that can be disassembled and for which spare parts are available.
- Prioritize furniture that is easy to recycle and whose components are reusable.
- For wood components, prioritize solid wood from sustainably managed forests.
- For upholstered furniture, prioritize items that are free from harmful chemicals.
- For wood-based components, prioritize finished products with very low formaldehyde content (less than or equal to 10 ppm).
- Exclude all items made from tropical wood.
- Exclude all items with high concentrations of volatile organic compounds.

LANDSCAPING AND PLANTS

MEASURES

- The City is committed to creating integrated landscaping adapted to each space. This type of management produces financial, ecological and social benefits.

PROCUREMENT CRITERIA

- Require chemical-free fertilizers.
- Require bidders to pick up excess packaging.
- Prioritize products certified for their overall environmental performance.
- Plant perennials and limit use of annuals.
- Prioritize integrated development and value biodiversity.
- Prioritize species that require little watering.

FAIR TRADE PRODUCTS

- Prioritize fair trade products certified by the Association québécoise du commerce équitable.
- Prioritize procurement of such products in local businesses.
- Prioritize procurement of fair trade certified coffee, sugar and tea.

STREET FURNITURE

MEASURES

- Where possible, the City undertakes to reuse furniture in order to limit procurement of new products. Disposal of street furniture at end-of-life needs to be taken into account so that materials are reclaimed or recycled.

PROCUREMENT CRITERIA

- Require that the bidder provide traceable raw materials.
- Require traceable tropical timber and require FSC certification or equivalent.
- Prioritize locally manufactured street furniture.
- Prioritize materials and products made from post-consumer recycled materials.
- For wood components, prioritize solid wood from sustainably managed forests.
- Prioritize procurement of durable, weatherproof products to limit breakage and maintenance.
- Prioritize single-component furniture or easy-to-remove furniture in order to promote disposal of materials at end-of-life.
- Prioritize furniture free from harmful chemicals.

PRINTING AND COMMUNICATIONS

MEASURES

- Quantities are specific to each order and preliminary research will be done to match, to the extent possible, the quantity ordered and the quantity required for the campaign.

PROCUREMENT CRITERIA

- Require (with the exception of proven technical incompatibility) 100% recycled paper certified by the FSC.
- Require (with the exception of proven technical incompatibility) paper that is bleached without chlorine or chlorine compounds bearing the PCF or TCF label.
- Prioritize printers featuring techniques that have the least possible environmental impact.
- Prioritize use of water-based or vegetable-based inks.
- Make sure the printer does not use chemicals (inks, solvents, etc.) that are harmful to the environment.
- Prioritize printers that do not use carcinogenic, mutagenic or toxic chemicals.
- Select paper free from chemicals that pose health and environmental risks.

MAINTENANCE PRODUCTS, PRODUCTS FOR REMOVING GRAFFITI, AND PAINTS

- Prioritize products that guarantee a low impact on health and the environment.
- Prioritize biodegradable products as much as possible.
- Prioritize products certified for their overall environmental performance.
- Prioritize products that are free of solvents, toxic additives and volatile organic compounds.
- Prioritize products whose container can be refilled several times by the bidder.
- Limit use of products that are harmful to health and the environment to remove graffiti on public property.
- Limit aerosol products, and if the product is not available in another form, ensure proper disposal of aerosols at end-of-life.

APPENDIX E – REFLECTION ON RESPONSIBLE PROCUREMENT DECISIONS

Here are some questions that may help guide your responsible procurement process, if the product you are looking for is not listed on the decision support sheets.

NEED

1. Does the target procurement meet a real need or have you opted for the most effective product or service?
2. Can you enter into a negotiated contract, since a non-profit organization (NPO) offers the product or service? Have you thought of including these organizations in an invitation to tender?
3. Have you questioned the need to use the good or service?
4. Is there a more ecological or socially responsible alternative (sustainable product) available on the market?
5. Does a suitable company offer the product or service? Have you thought of including these companies in an invitation to tender?
6. Does a social economy enterprise offer the product or service? Have you thought of including these companies in an invitation to tender?
7. Have you thought about the transportation, distribution and disposal costs of the product? Are these costs significant compared to the procurement price?
8. Have you thought about disposal costs (donation, reuse, recycling, landfill)? Are these costs significant compared to the procurement price?
9. Can you estimate these disposal and transportation costs for each alternative in order to compare them before procurement?
10. Is there a resale market for the product?
11. Has transportation been optimized to reduce the number of deliveries and environmental impacts associated with procurement?
12. Are the equipment and infrastructure needed for product recovery, recycling, composting or reclamation available in your organization and community?
13. Is the product subject to hazardous materials regulations?

PRODUCT OR SERVICE

14. Did you estimate the quantities required to minimize resource waste?
15. Have you made sure that the renewable resource used to create the product or service does not come from areas that have been deforested, overexploited or expropriated?
16. Does the product contain harmful chemicals (e.g. volatile organic compounds)? Have you checked whether there is a solution that poses less risk to the health and safety of users or residents?
17. Is the sustainable product of equal or better quality than the traditional product?
18. Is the sustainable product or service available from several bidders or manufacturers?
19. Is the product easy to dismantle and recycle at end-of-life?
20. Is the packaging reusable or recyclable?
21. Does the successful bidder recover the packaging?
22. Is the packaging made from recycled materials?
23. Does the product manufacturing process limit greenhouse gas emissions?

24. Does the product manufacturing process limit the emission of pollutants into water, air or soil?
25. Is a sustainable alternative sold in sufficient quantities?
26. Is the cost of responsible procurement higher for this product than for the traditional product? If so, can you use less, combine some needs or extend its lifecycle?
27. Has the product undergone a lifecycle analysis? If so, does it meet the ISO 14040 standard?
28. Does it have environmental certification (e.g. Ecologo, Green Seal, FSC, Energy Star, EcoCert)?
29. Does it have social certification (e.g. EcoCert, Fair trade)?
30. Is there a version of the product with recycled content (e.g. paper made from 100% recycled fiber)?
31. Does this product use the least resources (water, energy, etc.)?
32. Is product or service use maximized?
33. Is the product multi-purpose and can it meet more than one need in order to reduce the number of purchases?
34. Does the product have a recommended lifespan? What is it?
35. Does this product produce the least noise or heat?
36. Is it easily reusable or recyclable at the end of its useful life?
37. Does it comply with municipal, provincial and national regulations?
38. Is it compostable or recoverable at end-of-life (e.g. energy production)?
39. Can it be replaced by a service or a rental?
40. Can it be recovered by the bidder and managed in accordance with the 4R-D principle?
41. Does it meet the real need or have you opted for the most effective product?
42. Have you considered the costs of storage, maintenance and resource consumption related to operating the product during its lifespan?
43. Are there any risks that the product is involved in controversies surrounding working conditions in the production chain (e.g. textile factories in Bangladesh, conflict minerals)?
44. Is the raw material used to manufacture the product from renewable (wood, rubber, bamboo, etc.) or non-renewable resources (plastic made from petroleum, etc.)?
45. Is there a used version of the product (e.g. refurbished furniture) for the function and quality sought?



THE BIDDER

46. Does the bidder follow sustainable development management practices based on a recognized system (ISO 26000, Bureau de normalisation du Québec (BNQ) 21000)?
47. Does it adhere to or is it a signatory to an international convention (ILO)?
48. Does it enforce an environmental or sustainable development policy?
49. Does it enforce a responsible procurement policy?
50. Does it follow a sustainable development plan?
51. Does it enforce a code of ethics or conduct based on human and worker rights?
52. Does it meet a social certification standard (e.g. SA 8000 social responsibility standards, OHSAS 18001 Occupational Health and Safety Assessment Series and Healthy Enterprise)?
53. Does it have a Workplace Health and Safety program (e.g. Healthy Enterprise)?
54. Does it have an environmental management system or is it ISO 14001 certified?
55. Does it publish a report on its sustainable development or environmental measures, in which it describes the steps it takes to reduce the environmental and social impacts of its activities?
56. Does it publish a sustainability report in accordance with Global Reporting Initiative (GRI) guidelines?

APPENDIX F – LIST OF RESPONSIBLE PROCUREMENT BIDDERS

As an indication (not a comprehensive list):

- Detailed company search platform in the Government of Canada's Canadian Company Capabilities database;
- *Guide to Greener Electronics* – Greenpeace USA;
- Organisations d'économie sociale – partenaires du Conseil d'économie sociale de l'île de Montréal (CESIM);
- City of Pointe-Claire List of responsible suppliers based on the City of Montréal List of suppliers.
- SyGED platform, project 401-141: List of responsible suppliers. Providers are listed by name, year the evaluation grid was submitted, and service category abbreviation (e.g. MarioC_2018_SNT).

APPENDIX G – EXCEPTIONS TO THE RESPONSIBLE PROCUREMENT GUIDE

The following exceptions are the subject of a business case presentation to explain where this guide does not apply.

1. Exceptions set out in section 573.3 of the *Cities and Towns Act*, including:
 - Contracts for which a tariff is fixed or approved by the Government of Canada or of Québec or by a minister or body thereof and contracts entered into between municipal corporations;
 - Contracts whose object is the supply of movable property or services related to cultural or artistic fields, subscriptions or computer software for educational purposes;
 - Contracts whose object is the supply of media space for the purposes of a publicity campaign or for promotional purposes;
 - Contracts whose object, which stems from the use of a software package or software product, is to:
 - a) ensure compatibility with existing systems, software packages or software products;
 - b) ensure the protection of exclusive rights such as copyrights, patents or exclusive licences;
 - c) carry out research and development;
 - d) produce a prototype or original concept.
 - Contracts whose object is the supply of services by a bidder in a monopoly position in the field of communications, electricity or gas;
 - If a professional services contract for the drawing up of plans and specifications was the subject of a call for tenders, a contract entered into with the designer of those plans and specifications for:
 - a) their adaptation or modification for the carrying out of the work for the purposes for which they were prepared; or
 - b) the supervision of the work related to such modification or adaptation or, within the scope of a fixed-price contract, related to an extension of the duration of the work.
2. Any other situations described in the *Cities and Towns Act*.
3. Issues related to salary management, pension funds and management of sums related to employer contributions.
4. Amounts owed by the City to a government authority under a legislative or governmental provision.
5. Management and payment of subsidies.
6. Repayment of bonds and interest coupons on debt service.
7. Expenses paid by trust.
8. Travel and entertainment expenses.
9. Dispute settlement.
10. Professional organization fees.
11. Public transportation services.
12. Public utilities.
13. Specialized individual training needs.
14. Legal services required in proceedings before a court, body or person exercising judicial or judicial functions.

APPENDIX H – RESPONSIBLE PROCUREMENT GUIDE DEFINITIONS

This appendix contains the definitions of words and phrases used in this guide that relate generally to supply management.

4R-D – Reduction, reuse, recovery, recycling, reclamation and disposal of residual materials. The 4R-D principle prioritizes these actions for ecological management in the order indicated.

ADJUSTED COST – Amount established in determining the lowest price that takes into account lifecycle, environmental, installation, maintenance, training, infrastructure, consumables, disposal costs, etc. However, this price adjustment must be based on measurable variables, clearly mentioned in the call for tenders.

BID – Market response to a call for tenders or request for quotations, whereby a bidder agrees to meet the City's requirements at a certain price.

BIDDER – Legal or natural person, also referred to as supplier, service provider or entrepreneur, capable of filling the procurement request.

BID DOCUMENTS – All documents related to a call for tenders including, but not limited to: instructions to bidders, bid form (including the price schedule), the specifications (definition of the requirement and special clauses) and the contract (general clauses) and their respective appendices.

BID WEIGHTING AND EVALUATION SYSTEM – Weighting and evaluation criteria that can only be developed by the City's Material and Contract Resources and the City's Engineering and Technical Departments. These criteria must be mentioned in the call for tenders and used to evaluate the bids received. Prepared in advance, they have been approved by City Council and are part of the bid documents.

CALL FOR TENDERS – Process for requesting competing bids on a contract by open tender or invitation, following which bids are received and evaluated for selection of a successful bidder in accordance with the procurement rules set out in the specifications.

CERTIFICATION – Third-party certification of products, services, processes, systems or persons.

THE CITY – The City of Pointe-Claire.

CONTRACT – Written document outlining the terms and conditions for adjudicating or awarding a City procurement agreement to a successful bidder. The contract gives rise to a financial obligation confirmed by a purchase order.

DELEGATION OF POWER – Authorization, granted by City Council, to spend money for procurement purposes.

EMERGENCY – A situation that endangers the lives of residents or that may cause significant damage to City property.

ENVIRONMENTAL CRITERIA – Principles that guide the choice of procurement that minimizes exploitation and use of non-renewable natural resources, avoids generation of waste and reduces the ecological risks of contamination associated with consumer habits and all lifecycle activities.

FINANCIAL COMMITMENT – Monetary value that the City undertakes to pay pursuant to a procurement process. Sum available and reserved in the budget. The requirement to be met is charged to the budget when a purchase order is produced.

GUARANTOR – Person who guarantees a commitment.

INVENTORY – Systematic, exhaustive cataloguing of the City's assets, indicating their location and present value.

LIFECYCLE COST (LCC) – Cost of all activities involved in the lifecycle of the product or service. These activities may include, but are not limited to, customs, storage, disposal, maintenance, manufacturing, consumables, training, installation, transportation and usage fees, energy performance, useful life, etc. Lifecycle cost is used to compare products, work methods or services in order to make the best procurement choice to limit impacts on the following four main categories: climate, natural resources, ecosystems, and human health.

MUNICIPAL DEPARTMENTS – Each City department and its public office holders.

NEED – Systematic detailed study to produce a written estimate of the request for goods or services, for procurement purposes.

NEGOTIATED CONTRACT – Procurement for an amount, including all taxes, below the threshold set by the *By-law on contract management*.

PROCUREMENT – Acquisition of goods, services or performance of work for the City. Action of procuring goods, services or work.

PURCHASE ORDER – Official financial commitment by the City to a successful bidder, confirming the procurement contract.

PURCHASE REQUISITION – Request for goods or services.

RECURRING NEED – Procurement that must be performed at regular intervals.

REQUEST FOR QUOTATIONS – Simplified process for obtaining procurement prices, which involves asking suppliers for prices to meet a need and choosing the bid that best meets this need.

RESPONSIBLE PROCUREMENT – Integration of environmental and social criteria into procurement processes in an effort to minimize environmental impacts, increase social benefits and strengthen the economic sustainability of organizations throughout the lifecycles of the products. (Adaptation of the definition of the Sustainability Purchasing Network, cited in *Espace de concertation sur les pratiques d’approvisionnement responsable* (ECPAR), 2008.)

SOCIAL CRITERIA – Principles that guide the choice of procurement that promotes local work, social reintegration and fair trade. Contracts are entered into with nearby successful bidders to boost the local economy and help improve resiliency. Hiring workers who are returning to active employment is a reflection of a communal desire for equity and solidarity. The City is guided by the principles established by the International Labor Organization (ILO) in the *ILO Declaration on Fundamental Principles and Rights at Work and its Follow-up* (1998), and by the United Nations in the *Universal Declaration of Human Rights* (UDHR) (1948) to establish its social criteria.

SPECIFICATIONS – Administrative and technical document that describes the requirement, through clauses, conditions and procurement specifications.

SUCCESSFUL BIDDER – Person who has been awarded a procurement contract in response to a call for tenders.

SUSTAINABLE DEVELOPMENT – “Development that meets the needs of the present without compromising the ability of future generations to meet their own needs” (Government of Quebec). Sustainable development is economically viable and incorporates the 4R-D principle.

USEFUL LIFESPAN – Period over which an asset, alone or in combination with others, can be expected to contribute directly or indirectly to future cash flows.

VOCs – Carbon- and hydrogen-based volatile organic compounds that evaporate at ambient temperature and pressure. They are often toxic and polluting to varying degrees, depending on their composition.

APPENDIX I – REFERENCE DOCUMENTS

- *Politique d'approvisionnement responsable* de l'arrondissement du Plateau-Mont-Royal.
- Sustainability Purchasing Network, quoted in ECPAR, 2008.
- « *Politique de gestion contractuelle* » de la Ville de Magog, révision du 17 décembre 2010.
- *Principes et mesures d'approvisionnement durable* de la Société de transport de Montréal (STM), révision 2017.
- *Politique d'approvisionnement responsable* de la Ville de Longueuil.
- *Baromètre de l'achat responsable 2016* de l'ECPAR.
- *Économie circulaire au Québec : Opportunités et impacts économiques*, March 2018.
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