



YORK REGION DISTRICT SCHOOL BOARD

Policy and Procedure #465.0, Tendering Capital Construction and Maintenance Projects

The Tendering Capital Construction and Maintenance Projects policy and procedure ensure a fair and equitable tendering process for all capital construction and maintenance projects and outline the communication of this process to all stakeholders.

Who has responsibilities?

- Board of Trustees
- Director of Education
- Superintendents
- Architects and Consultants
- Plant Services
- Education and Community Services
- Business/Finance Services
- Purchasing Services

How is this policy and procedure related to Board priorities?

The Tendering Capital Construction and Maintenance Projects policy and procedure supports student achievement and well-being supporting capital construction and maintenance projects that ensures schools and workplaces are inviting, safe and supportive and foster engagement of students, staff, parent(s)/guardian(s) and the community .

It also demonstrates stewardship of Board resources by demonstrating professionalism and accountability for high standards of practice in all Board operations.

Engagement: Student Achievement and Well-Being - Develop a comprehensive strategy for improved parent engagement which supports student achievement and well-being.

Department

Plant Services

It is the expectation of the York Region District School Board that all employees, students and persons invited to or visiting Board property; or partaking/volunteering in Board or school-sponsored events and activities will respect the policies and procedures of the Board. The term "parents" refers to both biological/adoptive parents and guardians in all Board policies and procedures.



Board Policy #465.0 Tendering Capital Construction and Maintenance Projects

Policy Statement

The York Region District School Board is committed to upholding a fair and equitable tendering process for all capital construction and maintenance projects and facilitating the communication of this process through proper channels to Board trustees, staff, parents and school communities in accordance with the Board's mission, vision, values and planning processes.

Application

This policy applies to all calls for tenders for construction or maintenance projects.

Trustee participation is required for all non-electronic tender openings in excess of \$1,000,000.00. Trustee attendance is not required for electronic tenders.

Responsibilities

The Board of Trustees is responsible for:

- ensuring that one trustee is present at the opening of any non-electronic tender in excess of \$1,000,000.00;
- reviewing the Tendering Capital Construction and Maintenance Projects policy in accordance with the priorities in the [Multi-Year Plan](#) and the approved policy review cycle; and
- understanding and communicating with members of the community about the Tendering Capital Construction and Maintenance Projects policy, as required.

The trustee present at non-electronic tender openings is responsible for:

- welcoming the bidding contractors present for participation in the tendering process; and
- initialing the bids after the tenders are opened and read.

The Director of Education is responsible for:

- implementing and operationalizing the Tendering Capital Construction and Maintenance Projects policy.

Definitions

Capital Construction Projects

Capital construction projects are construction projects such as new secondary and elementary schools, additions to schools and major renovations of schools.

Maintenance Projects

Maintenance projects refer to site renewal projects, or the repair or replacement of the building envelope and/or building systems.

Electronic Tenders

A centralized electronic online process that manages the tendering posting and bid submissions.

History

Approved 1996

Replacing Policy #455.0, Performance Bond and Payment of Labour and Materials Bond

Working Document: February 2013, February 2018

Revised 2002, 2008, November 2013, December 2018



Board Procedure #465.0 Tendering Capital Construction and Maintenance Projects

This procedure outlines the roles and responsibilities for upholding a fair and equitable tendering process for all capital construction and maintenance projects and facilitating the communication of this process through proper channels to trustees, staff, parents, and school communities in accordance with the Board's mission, vision, values and planning processes including but not limited to the [Multi-Year Plan](#).

Application

This procedure applies to all tenders for construction or maintenance projects.

Definitions

In-House Tenders

A process of inviting bids that does not require the services of an Architect or Consultant.

Responsibilities

The Director of Education shall:

- allocate staff and resources to support the Tendering Capital Construction and Maintenance Projects procedure.

The superintendent responsible for Plant Services, or designate, shall:

- oversee in the opening of the tender documents;
- select , in conjunction with Purchasing Services, an architectural firm for Board approval from the pre-qualified approved list of architects for each capital construction or maintenance project; and
- determine, in conjunction with the Chief Financial Officer, the requirements for performance bonds, labour and material payment bonds, letters of credit and/or certified cheques.

The Architects and/or Consultants shall:

- send notification to the bidders list of the tender, bidding and project information to pre-qualified contractors;
- provide a copy of the bid package for all capital construction and maintenance projects to Purchasing Services prior to issuance to the contractors;
- respond to questions from the bidders during the tendering period;
- issue addenda on the projects, as required;
- provide a copy of any addenda to Purchasing Services prior to issuance to the contractors;
- be present at any non-electronic tender opening; and
- review all tender submissions and submit recommendations to the Board for awarding of the contract/project.

The Managers of Construction and/or Managers of Maintenance shall:

- obtain a tender number from Purchasing Services for all capital construction and maintenance projects;
- review the budget with the architect and/or consultant before tenders are issued;
- determine scheduling for the project;

- set a tendering period in conjunction with Purchasing Services;
- participate in non-electronic tender openings; and
- ensure the appropriate trustee is invited and introduced at the tender opening as required.

Purchasing Services shall:

- provide tender templates and numbers;
- assist Plant Services in determining the bidders list for capital construction and maintenance projects from the list of pre-qualified contractors;
- review tender documents prior to issuance by the architect/ consultant;
- for in-house tenders work in conjunction with Plant Services to develop, complete, issue and award tender;
- assist in the opening of any non-electronic tender documents;
- ensure all non-electronic bids are initialed by the appropriate people after they are opened and read; and
- ensure compliance with the Broader Public Sector Procurement directive by posting any tender over \$100,000.00 to an electronic tendering network.

History

Working Document: February 2018.
Revised December 2018