



Procurement Policy

Procurement applies to two types of contracting: 1) when procuring goods, works, and services and 2) when receiving grants and contracts to undertake work.

In order to obtain and record an engagement with a vendor, Open Contracting Partnership will use contract templates as approved by the Executive Director. These templates shall prescribe the services, terms, compensation, invoicing, payment procedures, and relevant laws and policies in the contract. Unless the vendor has its own contract template, OCP's contract template will be prepared by the relevant manager, signed by the Executive Director or delegated senior OCP employee, and provided to the vendor for approval and signature. Once the contract is finalized, the contract is provided to the accountant/bookkeeper for entry into the accounting system.

OCP will seek to make its procurement processes as transparent and consultative as possible in line with its public mission.

A competitive process will be held for contracts in excess of \$25,000 unless a compelling reason for not doing so is approved by the Board's Executive Committee. Any exception to running a competitive tender above \$25,000 will require the Executive Director or other OCP senior team member to prepare and have the Executive Committee of the Board approve a written [Sole Source Justification](#).

For any competitive process, OCP will attempt to publish the draft terms of reference or specifications for public comment on its website in advance of the tender/solicitation. Publishing drafts as part of planning will generate feedback and improve the quality of the work to be undertaken overall.

The competitive processes may not be focused on price only, but also include non-price factors to establish the best value tradeoff for the services rendered, mindful that OCP should keep these criteria as simple and transparent as possible.

For competitive processes, OCP will publish on its website or other portals a Tender/Solicitation Packet, including:

- Terms of reference/statement of work;
- Draft contract terms;
- Evaluation criteria (including terms such as experience, reputation, expertise, opportunities to share learning, etc);
- Bid/Offer/Proposal instructions and dates.

The closing date for bids/offers/proposals will be at least two weeks after the publication of the Tender/Solicitation Packet. All questions and answers from potential bidders will be published without attribution, along with any revised documents. The due date for bids/offers/proposals may be extended if there are substantial revisions to the tender/solicitation documents, following questions.

After the submission of bids, offers, or proposals, OCP may ask clarifying questions and/or ask for revised offers where there are errors.

OCP will not share the information submitted by one bidder with another. OCP may hold discussions with a bidder to hear verbal responses to the questions. OCP will provide the same new deadline for all bidders to submit written answers to the questions and any revisions to their bids, offers, and proposals.

As a recipient of contracts and grants, OCP will always ask funders for permission to publish the grant agreements, any amendments, the project proposal and annual progress and budget reports provided. Additionally, OCP will always seek permission from funders to publish a summary of each agreement that will include information on the funder, funding amounts, project specific vs core funding, and project duration.

Further details are covered in OCP's Financial Policies and Procedures Manual which is regularly reviewed by the Board.