

UNITED WAY OF CENTRAL OHIO Competitive Bidding Guidelines

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A. BACKGROUND INFORMATION

These guidelines provide direction for consistent business practices that United Way of Central Ohio (including all programs under the UWCO tax ID #) follows to conduct its business effectively, efficiently, and ethically.

These guidelines apply to all current and future contracts involving substantial financial and service commitments because they have a significant impact on the successful attainment of UWCO mission and require the greatest commitment of the organization's resources. The normal business cycle extends over a three to six year period subject to satisfactory performance by the provider. In no case should a contract term extend beyond six years without prior approval of the Chief Operating Officer and a bidding process.

All service contracts whether within the scope of these guidelines, or not, are subject to the requirements of the general Purchasing Policy and the Minority and Women-Owned and Small Business Procurement Policy. The Purchasing Policy provides that contracts of \$5,000 or more have at least two quotes prior to awarding a contract. Contracts less than \$5,000 but over \$2,500 must be authorized by the Division Vice President and reviewed by the Chief Operating Officer prior to signing. All proposals subject to a bid process must adhere to the General Selection Criteria as described in Section B below.

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B. GENERAL SELECTION CRITERIA

The general selection criteria used when considering competing proposals are as follows: Local Presence; Cost; Quality; Cultural Diversity; United Way Support; Financial Stability; Organized Labor Involvement; Customer Satisfaction; Product Design; Simplified Administration; Management Reporting, Responsiveness to the bid, and Satisfaction with prior interactions with vendor.

Special selection criteria relevant to the services may be added to the above by the designated Vice President and/or Committee. Compliance with bidding procedures and submission of all necessary information is required for bids to be considered.

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C. COMMITTEE PROCEDURES

To the extent practicable, Committees responsible for the service area should follow the procedures below:

1. Appoint one member of the designated Committee to lead the competitive bidding process.

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2. Establish a task force to plan and coordinate the project on behalf of the committee.
3. Develop an invitation-to-bid letter / Request for Proposal along with appropriate background materials.
4. Develop a selection criteria list.
5. Develop a bidder prospect list, ensuring that invitations to bid are distributed widely in the community, including union contractors and minority, female-owned and small businesses, when available.
6. Establish a timetable for the planning, implementation, and evaluation phases of the process.
7. Send out the letter, background materials, and the selection criteria statement to the approved prospects. Establish and provide a deadline for submission of proposals.
8. Evaluate the bids received by the target date and finalize all bid proposals.
9. Work with the Committee to select the best bid and to develop the appropriate recommendations. Document all pertinent activities in the Committee minutes.

D. CURRENT SERVICE AREAS, BUSINESS CYCLES, AND DESIGNATED COMMITTEES

These guidelines currently apply to the services listed below.

<u>Service Area</u>	<u>Business Cycle (a) (b)</u>	<u>Designated Committee</u>	<u>Next Bid Year (c)</u>
1. Auditing	5 Years	Finance	2008
2. Investment Consulting (401K, Pension Plan)	6 Years	Finance, Pension	2005, 2009
3. Group Insurance (Life, LTD, Health)	3 Years	Human Resources (d)	2008
4. Insurance Broker	6 Years	Human Resources	2006
5. Property & Casualty	3 Years	Finance Committee (d)	2006

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Notes: (a) The length of this business cycle is based upon a variety of factors such as: industry standards; nature of service; impact of change on customers and staff; cost considerations; impact of systems change.

(b) Each designated Committee is encouraged to conduct annual evaluations to assess the service performance and fees during the interim periods of the contract.

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(c) The next bid year refers to the year in which the bid process is conducted. The conversion date to a new vendor, if appropriate, follows the bid process and may commence the following year.

(d) When a broker is used, the Committee must be involved in the bidding process, including setting criteria, review, and approval of the Request for Proposal.

E. APPROVAL PROCESS

The Chief Operating Officer and Chief Financial Officer, in consultation with appropriate volunteers and staff, will determine whether the approval process should be handled by staff, Committee or be extended beyond the designated Committee.

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1. If handled by Committee, the designated Committee must approve the following:

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- a. Selection Criteria List.
- b. Bidder Prospect List.
- c. Vendor Selection.
- d. Other Task Force Recommendations.

2. The UWCO Treasurer will present recommendations to the UWCO Executive Committee and/or Board of Trustees to gain final approval when necessary.

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3. An exception to receiving multiple quotes may be granted by the Chief Operating Officer for suppliers providing one-of-a-kind, highly specialized goods or services, or services which represent a continuation or update of prior services where using a new vendor would mean incurring significant additional cost. Request and justification for such exception must be provided in writing to the Chief Operating Officer and approval of such request will be provided in writing to be maintained by department.

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