

Procurement Records Retention	Section: Procurement Number: 1.23
Approved: April 11, 2022	Page: 1 of 3
Revised:	Scope: All Employees

POLICY:

The procurement documents as well as any other pertinent information for reporting and auditing purposes must be retained for a period of seven (7) years and be in recoverable form if requested. These documents may also be used as support in the event of a bid protest or competitive process dispute.

SCOPE:

The purpose of this policy is to define how confidential or proprietary information is to be stored and the location of the storage.

PROCEDURE:

A record of the procurement process documentation includes the following:

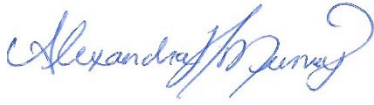
- A copy of the procurement justification or the business case
- Information regarding all vendor consultations, including any requests for information, undertaken in the development of the procurement business case and/or procurement documents
- Evidence that all required approvals were obtained
- Copies of all procurement documents used to qualify and select the supplier
- Where the procurement was conducted through a Vendor of Record (VOR) arrangement, information regarding the second-stage selection process used to select the particular VOR
- Where the procurement was single or sole sourced, documented justification, applicable exemptions and associated approvals

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- Copies of all procurement documents
- Copies of all disclosure agreements are signed by Evaluation Team members who evaluate tenders
- Copies of all successful and unsuccessful responses, submissions, proposals and bids received in response to procurement documents
- Information regarding any issues that arose during the procurement process
- Information regarding all evaluations of submissions, proposals and bids received in response to procurement documents
- Information regarding all vendor debriefings including written documentation of the offer of vendor debriefing
- Copies of all award letters, notices and posted announcements
- Copies of the agreement(s)
- Information regarding all changes to the terms and conditions of the Agreement, including any changes that resulted in an increase in the Agreement price
- Information regarding the management of the supplier, including how the supplier's performance was monitored and managed and where applicable, mechanisms used to transfer knowledge from the supplier to organization and staff
- Risk assessment information and recommendations, where applicable
- Contractor security screening decisions, where applicable
- Information regarding all protests, disputes or supplier complaints regarding the procurement including any Agreement disputes
- Evidence of receipt of deliverables (electronic records/packing slips)
- Any other documentation as identified by the organization

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Approved by:



Executive Director

April 11, 2022

Date



Board President

April 11, 2022

Date