

# Procurement checklist



*This checklist is provided as a tool to assist Business Owners and is not exhaustive of all potential scenarios. Note that it is the business owner's responsibility to ensure that necessary due diligence has been completed with regards to FortisBC MRS, PIA, and SRA requirements.*

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|--------------------------|--|
| <input type="checkbox"/> | <b>Procurement Policy</b> <ul style="list-style-type: none"> <li><a href="https://crl.fortisbc.com/Business-Support-Services/Supply-Chain/Procurement/Pages/1054.aspx">https://crl.fortisbc.com/Business-Support-Services/Supply-Chain/Procurement/Pages/1054.aspx</a></li> </ul>  |
| <input type="checkbox"/> | <b>Procurement Guidelines</b> <ul style="list-style-type: none"> <li><a href="https://crl.fortisbc.com/Business-Support-Services/Supply-Chain/Procurement/Pages/1089.aspx">https://crl.fortisbc.com/Business-Support-Services/Supply-Chain/Procurement/Pages/1089.aspx</a></li> <li>Estimated Procurement timelines can be found under Response Time (pg. 9)</li> </ul>  |
| <input type="checkbox"/> | <b>Contracting party:</b><br><input type="checkbox"/> FortisBC Inc. (FBC) <input type="checkbox"/> FortisBC Energy Inc. (FEI) <input type="checkbox"/> Aitken Creek Gas Storage (ACGS) <input type="checkbox"/> FortisBC Alternative Energy Services (FAES)<br><input type="checkbox"/> Other:   |
| <input type="checkbox"/> | <b>Scope of Work</b> <ul style="list-style-type: none"> <li>A detailed scope of work, specifications, drawings, any required reference documents (e.g. standards, detailed plans), timetable of start and completion of work and deliverables.</li> <li>Ensure scope of work and specifications comply with all governing laws, FortisBC internal policies and procedures.</li> </ul>  |
| <input type="checkbox"/> | <b>Contractor Prequalification/ ISNetworld (ISN)</b> <ul style="list-style-type: none"> <li>FortisBC utilizes ISNetworld to facilitate and manage internal contractor compliance requirements for moderate to high-risk work.</li> <li>Contractors performing this work must be registered with ISNetworld to do work for FortisBC for the work-type they will be performing and must have a passing grade on ISNetworld, as of the date of award of the contract and prior to work commencing.</li> <li>Contact the <a href="#">Procurement Administrator</a> or your <a href="#">Procurement Agent</a> if you have further questions regarding this requirement or wish to have direct access to the ISN platform.</li> </ul>  |
| <input type="checkbox"/> | <b>Requirements for Prime Contractor designation, bonds, builder's liens, holdback, incentives.</b>  |
| <input type="checkbox"/> | <b>Security Risk Assessment</b> (aka Technical Risk Assessment) <ul style="list-style-type: none"> <li>Required where a security risk may be posed to FBC by a vendor. This can include, but is not limited to, malware, cyber risk or cyber weaknesses, access to vulnerable systems or other sensitive secure areas (MRS control areas).</li> <li><b>Data stored outside of Canada</b></li> </ul>  |
| <input type="checkbox"/> | <b>Privacy Impact Assessment</b> <ul style="list-style-type: none"> <li>The Privacy Impact Assessment ("PIA") is a tool used to identify potential privacy risks for activities, systems, projects and programs undertaken by FortisBC.</li> <li>The PIA should be completed by the FortisBC business owner whenever a significant amount of, or sensitive personal information is being collected, used or disclosed as part of a project.</li> <li><a href="https://connector.fortisbc.com/DepartmentsandServices/Privacy/Pages/PrivacyImpactAssessment.aspx">https://connector.fortisbc.com/DepartmentsandServices/Privacy/Pages/PrivacyImpactAssessment.aspx</a></li> </ul>  |
| <input type="checkbox"/> | <b>Mandatory Reliability Standards (MRS) + CIP13 - Electric</b> <ul style="list-style-type: none"> <li>FortisBC is committed to a strong Internal Compliance Program designed to foster compliance with the British Columbia Mandatory Reliability Standards. <a href="https://connector.fortisbc.com/DepartmentsandServices/MRS/Pages/default.aspx">https://connector.fortisbc.com/DepartmentsandServices/MRS/Pages/default.aspx</a></li> <li>If this purchase is for hardware, software, or services at KOC, SCC, VAS or BTS, please see the following information: <a href="https://workspace.fortisbc.com/ws/training/TR/JobAids/JobAid-CIP-013SharePointSiteOverview.pdf">https://workspace.fortisbc.com/ws/training/TR/JobAids/JobAid-CIP-013SharePointSiteOverview.pdf</a></li> </ul> |
| <input type="checkbox"/> | <b>IBEW Union Content (Electric)</b> <ul style="list-style-type: none"> <li>Notify the appropriate unions when necessary</li> </ul>  |
| <input type="checkbox"/> | <b>Temporary Foreign Workers</b> <ul style="list-style-type: none"> <li>Foreign contractors and third party vendors – like all foreign workers – are required to obtain work permits to provide services to a Canadian entity. A foreign worker's failure to obtain a work permit can have significant repercussions for their host company in Canada. There are some situations in which a work permit is not required, for example, business visitors, and after-sales service providers. However in most situations a person will require a work permit in order to be lawfully permitted to work in Canada.</li> </ul>   |
| <input type="checkbox"/> | <b>Safety and/or Environmental Management Plans</b> <ul style="list-style-type: none"> <li><a href="https://connector.fortisbc.com/DepartmentsandServices/Environment/Pages/default.aspx">https://connector.fortisbc.com/DepartmentsandServices/Environment/Pages/default.aspx</a></li> </ul>  |
| <input type="checkbox"/> | <b>Indigenous Involvement</b> <ul style="list-style-type: none"> <li>FortisBC is committed to building effective Indigenous relationships and to ensure we have the structure, resources and skills necessary to maintain these relationships. In order to meet this commitment, the actions of the company and its employees will be guided by the following principles:<br/> <a href="https://www.fortisbc.com/in-your-community/indigenous-relations/statement-of-indigenous-principles">https://www.fortisbc.com/in-your-community/indigenous-relations/statement-of-indigenous-principles</a></li> </ul>  |
| <input type="checkbox"/> | <b>Sustainability</b> <ul style="list-style-type: none"> <li>FortisBC's Sustainability Framework is built to ensure the long-term sustainability of FortisBC across four primary pillars: Customers, Partners &amp; Communities, Environment and Employees. Focus on these pillars will ensure that FortisBC continues to embed sustainability within its operations, and that a balanced approach is reflected in the business, social and environmental outcomes of our decisions.<br/> <a href="https://connector.fortisbc.com/OurCompany/Sustainability/Pages/default.aspx">https://connector.fortisbc.com/OurCompany/Sustainability/Pages/default.aspx</a></li> </ul>   |
| <input type="checkbox"/> | <b>Inclusion of Natural Gas (NGV), Compressed Natural Gas (CNG) Renewable Natural Gas (RNG) and/or Liquefied Natural Gas (LNG) requirements or evaluation criteria ie. Fleet/Vehicles</b>  |
| <input type="checkbox"/> | <b>Special insurance requirements (Professional Liability, Aircraft, Marine, other). See Insurance Guidelines for additional information.</b> <a href="https://crl.fortisbc.com/Business-Support-Services/Insurance/Pages/2111.aspx">https://crl.fortisbc.com/Business-Support-Services/Insurance/Pages/2111.aspx</a>  |
| <input type="checkbox"/> | <b>Tax (ie. PST exemptions; review with FBC Tax Dept if required)</b>  |
| <input type="checkbox"/> | <b>List of suggested bidders and reasons for excluding any potential bidder(s)</b>   |

**Single/sole source justification**

- In situations where a competitive bid is not issued by Procurement in favor of direct negotiations or single/sole sourcing, a sourcing justification must be documented in sufficient detail including a reason or rationale and approval by the individual with the appropriate commitment authority as per the Authorities Policy
  - Convenience and/or expediency alone are not sufficient reasons to bypass the competitive bidding process
  - <https://connector.fortisbc.com/ResourcesandTools/FormsandTemplates/Documents/3306.dot>
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