

**Corporate Purchasing Section
Procurement Services
Service Alberta**

PRE-QUALIFICATION PROCESS

Definitions

The pre-qualification process is a formal process to evaluate products/vendors (“products”) that typically requires a lengthy period of time to evaluate. The process eliminates the need to evaluate products after a solicitation closes and does not include pricing information.

“Qualification of goods and services”, as defined in Article 518 (Definitions) of the Agreement on Internal Trade (AIT), means a process whereby a buyer establishes a list of goods or services capable of responding to a specific need.

Process

- The pre-qualification process forms part of the procurement process, and as such, the Corporate Purchasing Section retains overall responsibility and accountability for pre-qualifying products. The requirements and evaluation results must be documented and maintained by the Corporate Purchasing Section.
- In order to commence the pre-qualification process, the Corporate Purchasing Section and the department collectively agree that it will facilitate the procurement process, and the Corporate Purchasing Section must ascertain that:
 - a requirement to purchase exists;
 - procurement policies are being met;
 - the pre-qualification process meets Article 506:7 of the AIT; and
 - the requirements meet all provisions of Chapter 5 (Procurement) of the AIT.

Department’s Role

The department, or the area responsible for establishing government-wide product standards, (“department”):

- defines the requirements stating functional/performance specifications, delivery, warranty, sample requirements, etc. and provides the information to the Corporate Purchasing Section;
- evaluates the products in accordance with the defined requirements, and in conjunction with the Corporate Purchasing Section, as appropriate;
- contacts vendors directly to clarify information and/or supply product samples, if required;
- tests sample products, if required;
- consults with the Corporate Purchasing Section when anomalies exist, such as minor deviations; and
- summarizes the evaluation results, inclusive of all pertinent information such as reasons for rejecting products for failure to meet the pre-qualification requirements, and forwards this summary to the Corporate Purchasing Section.

Corporate Purchasing Section's Role

- reviews the pre-qualification requirements prepared by the department to ensure there are no issues such as non-compliance with the AIT.
- posts a pre-qualification opportunity on the Alberta Purchasing Connection (APC) to enable vendors to have their product evaluated. Note: In order to maintain integrity in the process, vendors must respond to the Corporate Purchasing Section by the deadline identified in the posted opportunity. Responses received after the deadline, or not submitted to the Corporate Purchasing Section, are not evaluated.
- recaps all responses received by the deadline and forwards the recap and responses to the department for evaluation;
- reviews the department's evaluation results against the requirements published in the pre-qualification opportunity, and if necessary, obtains further clarification from the department;
- debriefs unsuccessful vendors, in conjunction with the department;
- prepares a solicitation document for the pre-qualified products, in conjunction with the department;
- posts the solicitation document on APC to obtain pricing for the pre-qualified products;
- evaluates the responses to the solicitation, in conjunction with the department, and contracts accordingly; and
- develops appropriate supply strategies consistent with government requirements.