

 <p>Winnipeg Regional Health Authority Office régional de la santé de Winnipeg Caring for Health À l'écoute de notre santé</p> <p><b>POLICY</b></p>	<p><b>REGIONAL</b></p> <p>Applicable to all WRHA governed sites and facilities (including hospitals and personal care homes), and all funded hospitals and personal care homes. All other funded entities are excluded unless set out within a particular Service Purchase Agreement.</p>		Level:  1
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	Approval Signature: <i>Original signed by B. Postl</i>	Section: <b>LOGISTICS SERVICES</b>	
	Date: June 2007	Supercedes: May 2005	

1.0 **PURPOSE:**

- 1.1 To ensure the delivery of flexible, responsive and client focused contracting services in order to obtain standardized, high quality, cost effective equipment, supplies and services.
- 1.2 To ensure the method employed shall be transparent and accountable.

2.0 **DEFINITIONS:**

- 2.1 Product Review Evaluation Standardization (PRES) Committee: Stakeholders who have the responsibility to represent their WRHA Clinical and Clinical Support Program or Facility at committee meetings and participate in the Contract Development process.
- 2.2 Stakeholder: one who has a share or interest in the equipment, supplies and services being procured.
- 2.3 Best Delivered Cost: encompasses not only the price paid but also considers equipment, supplies and service acceptability, cost of conversion, logistics costs (delivery charges, minimum order quantities).
- 2.4 Contract Schedule: listing of active Logistics Services contracts that shall be used for the purpose of prioritizing renewals of existing contracts.
- 2.5 Work Group: select individuals who have the responsibility to represent Stakeholders in the Contract Development process and provide expert knowledge in user requirements.
- 2.6 Bid Analysis: the evaluation of the bids received using established award criteria to determine a selected Supplier.
- 2.7 Clinical Support Program: those service areas that support the delivery of health care. e.g. physical plant, housekeeping, foodservices, medical device reprocessing.
- 2.8 Requirements: those products, services or equipment that are mandatory and that are identified in the competitive bid document.

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- 2.9 Project Lead: an individual who works on behalf of a Stakeholder(s) and has responsibility to oversee the entire acquisitions process including contracting.

### 3.0 **POLICY:**

- 3.1 Winnipeg Regional Health Authority (WRHA) Logistics Services, through Stakeholder consultation, shall facilitate the contract development process for equipment, supplies and service requirements to ensure Stakeholder-driven decisions are made for provision of high quality equipment, supplies and services at the Best Delivered Cost.
- 3.2 Stakeholder consultation may include, but shall not be limited to:
- Clinical PRES Committees as appointed by the WRHA Clinical and Clinical Support Program.
  - Support Service PRES Committees as appointed by the site, with input from WRHA Senior Management and Regional Materiel Management Committee as appropriate.
  - Work Groups as appointed by the respective PRES.
  - Project Lead and Work Groups as appointed by the respective program or facility.
- 3.3 Each Stakeholder(s) shall be accountable to their respective WRHA Clinical and Clinical Support Program, Regional Support Services Directors, and/or facilities and to the WRHA Senior Management.
- 3.4 Contract issues and the related Supplier communications shall be conducted by Logistics Services Contracting Staff based on Stakeholder criteria.

### 4.0 **PROCEDURE:**

- 4.1 A need for equipment, supply and/or service shall be identified by the Stakeholder(s) and shall be communicated through:
- PRES or Work Group agendas and minutes
  - Contract Schedule reviews at PRES and Work Group meetings
  - Contracting Manager
  - Materiel Management
  - Suppliers via the established process published in the Logistics Services Supplier Orientation Package
- 4.2 The Contracting Manager assigns the appropriate Supply Chain staff to the initiative.

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- 4.3 Logistics Services, in consultation with the Stakeholder(s), determines if standardization shall be achievable.
- Present levels of standardization are reviewed.
  - Effort versus potential return shall be reviewed.
- 4.4 Decision shall be made by the Stakeholder(s) to proceed, defer or refuse item for standardization.
- Communication back to facilities/programs via Stakeholder member.
  - Communication back to the Supplier via WRHA Logistics Services Contracting Staff.
- 4.5 If decision shall be to proceed, utilization data shall be made available via request to facility Materiel Managers in consultation with the Stakeholder(s).
- 4.6 For all recurring financial commitments related to on-going PRES and Work Group initiatives, Logistics Services obtains a signed letter of commitment from the site Materiel Manager or designate prior to issuing a competitive bid document. The signature shall be recognized as a commitment to participate on the contract once implemented.
- 4.7 For non-recurring financial commitments (e.g.: consultants) that impact the operating budget, written approval confirming funding availability shall be obtained from the appropriate signing authority.
- 4.8 For any financial commitment with new on-going incremental costs (e.g.: equipment leasing) that impact the operating budget, written approval confirming funding availability and commitment shall be obtained from the appropriate signing authority.
- 4.9 The Stakeholder(s) with support from Logistics Services Contracting staff determine the following:
- scope of the initiative
  - core contract Requirements
  - specifications
  - award criteria
- 4.10 Requests for items not part of the core contract Requirements, for example:
- a) additional services outside of the immediate Requirement, such as training and education funding
  - b) unrelated equipment requests with a supply contract
  - c) equipment requests through a surcharge on supplies
  - d) unrelated supply requests with an equipment contract

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shall be considered for inclusion as mandatory Requirements of the competitive bid document with approval from the WRHA Clinical and Clinical Support Program Team or Support Service Director. A determination as to whether or not the additional equipment, supply, and/or service shall be a mandatory Requirement shall be made by the WRHA Clinical and Clinical Support Program Team or Support Service Director and Logistics, in consultation with the PRES Committee/Work Group.

An appeal process shall be utilized to settle disputes. Only written submissions to the Director Regional Supply Chain WRHA shall be considered. The final authority for the decision rests with the WRHA CEO.

- 4.11 Competitive Bidding process takes place. Cross reference Purchasing Policy # 30.10.130
- 4.12 Bid Analysis shall be completed by Logistics Services Contracting staff and presented to the Stakeholder(s) for award decision.
- When there shall be a Project Lead, a minimum of two individuals shall make the decision.
  - If a Work Group shall be involved, the Bid Analysis shall be presented to the Work Group and an award recommendation shall then be brought forward to the PRES Committee for approval. All Stakeholder award decisions are by consensus.
- 4.13 The Stakeholder(s) determines if evaluation shall be required to assist in the award decision.  
**If yes, the following shall be determined by the Stakeholder(s):**
- Evaluation sites (limited if possible),
  - Evaluation time frame,
  - Evaluation criteria & form,
  - Evaluation contacts at chosen sites.
- 4.14 Logistics Services Contracting staff implement the award decision based on the instructions received from the Stakeholder(s).
- 4.15 Quality Assurance monitoring shall be ongoing.

## 5.0 **REFERENCES:**

- 5.1 The Agreement on Internal Trade (Canada) 1995
- 5.2 Cross Reference – See Policy:

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WRHA Purchasing #30.10.130 <http://home.wrha.mb.ca/corp/policy/files/FIN-30.10.130.pdf>

WRHA Contract Compliance #40.00.030  
<http://home.wrha.mb.ca/corp/policy/files/40.00.030%20website.pdf>

WRHA Value Add #40.00.020  
<http://home.wrha.mb.ca/corp/policy/files/40.00.020Value Added 40 00 020 June2007.pdf>

WRHA Complaint Monitoring #40.00.050  
<http://home.wrha.mb.ca/corp/policy/files/40.00.050ComplaintMonitoringandResolution LogisticServices RevAug06.pdf>

WRHA Delegation of Signing Authority Limits #10.00.050  
<http://home.wrha.mb.ca/corp/policy/files/10.00.050SigningAuthorityPolicyRevMay2005.pdf>

WRHA Conflict of Interest Policy # 20.10.011  
<http://home.wrha.mb.ca/corp/policy/files/20.10.011.pdf>

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