1.0 PURPOSE

The purpose of this procedure is to assure appropriate processes are followed when soliciting and evaluating bids and proposals from Suppliers. Proper documentation is critical to the integrity of the Procurement process and the success of the Project.

2.0 SCOPE

This procedure applies to the soliciting and evaluation of material and equipment bids, as well as Service and Subcontractor proposals. This procedure is applicable for Pike Energy Solutions only.

3.0 REFERENCES

3.1 Project Procedure P-5-1, Subcontractor/Supplier Qualification
3.2 Project Procedure P-5-3, Requisitioning
3.3 Project Procedure P-5-4, Issue of Purchase Order
3.4 Project Procedure P-5-5, Expediting
3.5 Project Procedure P-5-6, Subcontractor/Supplier Insurance and Bond
3.6 Project Procedure P-5-7, Small Business Plan
3.7 Project Procedure P-5-8, Subcontractor and Supplier Contract Review

4.0 DEFINITIONS

4.1 Single Source: One of several Suppliers who can provide a specific item to Pike, but has been identified by the Client as the only acceptable Supplier.

4.2 Sole Source: The only Supplier who can provide a specific item to Pike due to patent, process, etc.

4.3 Request for Proposal (RFP): A written document or a verbal request for pricing from Pike to any Supplier.
4.4 **Supplier:** Any company that provides a product or service for Pike. Usually, Suppliers do not require a physical presence on the Project site unless it is for deliveries.

4.5 **Subcontractor:** Any company who provides a service for Pike. Usually, Subcontractors require a physical presence on the Project site.

4.6 **Vendor:** Any company that provides material, equipment, or services to Pike.

**5.0 RESPONSIBILITIES**

The responsibilities of the roles below may be executed by a number of individuals as detailed or by a single individual. For example, a single individual, based on the size of the project, may perform the duties listed under Procurement Manager and Project Manager/Engineer. Note that these are roles and do not indicate actual employee titles.

5.1 The **Procurement Manager** or designee is responsible for the implementation of this procedure. For details, see Section 6.0.

5.2 The **Procurement Manager** and the **Project Manager/Engineer** are responsible for assuring compliance with this procedure throughout the Project.

5.3 The **Procurement Manager** or designee shall review the proposals to determine if they meet all the commercial aspects of the bid documents, including Terms and Conditions and Contract flowdowns (if any).

5.4 **Engineering** personnel or designee shall review for technical acceptability.

5.5 After agreeing that a proposal is both commercially and technically acceptable, the **Procurement Manager** and the **Project Manager/Engineer** shall make the award to the successful Bidder.

**6.0 PROCEDURE**

6.1 Procurement Manager or designee shall perform the following:

- Ensures each RFP is issued to companies capable of providing the material, equipment, or services described in the RFP.
- Ensures each Bidder is included on the Approved Suppliers List or is in the vetting process.
- Ensures all Suppliers receive the same bid documents containing the RFP, Terms and Conditions, Contract flowdowns (if any), Scope of Work, specifications, and drawings.
- Ensures each RFP contains a “Bid Due Date,” as well as contact names and numbers for both technical and commercial questions.
- Ensures each proposal is received by the “Bid Due Date.” Bids received after the “Bid Due Date” may be disqualified.
- Provides RFP responses to the Project Manager, Engineering, QA/QC, and Construction personnel for their evaluation.

6.2 The Project Manager and/or Engineering personnel shall ensure that the materials and/or equipment included in the proposal meet or exceed the technical aspects of the bid documents, including the specifications and drawings. Project Manager and/or Engineering personnel shall also ensure that any substitutions have the same form, fit, and function as the originally-specified item.

6.3 The Procurement Manager or designee and the Project Manager and/or Engineering personnel shall perform the following:
- Review all submittals to ensure that the proposals are both technically and commercially acceptable according to the bid documents, as well as the ability of a given Vendor to meet the schedule.
- Select the successful Bidder based on review of submitted proposals.

6.4 The Procurement Manager shall perform the following:
- Contact the successful Bidder and make the award.
- Contact the remaining Bidders and inform them they were not successful.

7.0 ATTACHMENTS

7.1 Bid Solicitation and Evaluation Flowchart

8.0 FORMS

None

9.0 REVISIONS AND APPROVALS

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Bid Package (RFP) received from Client

Project Engineer and/or Project Manager determines material, equipment, subcontract needs and informs Procurement

Bid Packages containing, flowdowns, terms and conditions, specifications, and drawings are assembled and forwarded via e-mail or hardcopy to pre-approved Suppliers and/or Subcontractors by Procurement

Proposals received by due date are reviewed by Procurement/Engineering for commercial and technical acceptability

Procurement and Engineering meet to discuss/compare Proposals

Commercially and technically acceptable?

Selected Bidder’s Proposal is used in Pike Proposal to Client

Most qualified Proposal both technically and commercially is chosen

NO

Procurement notifies unsuccessful Bidders

YES

END