

PROCEDURE FOR POLICY 2.8 – Procurement of Materials and Services

- 1.00 Where an Employee is a supplier or has a relationship with a supplier, compliance with [Policy 3.4](#) and [Policy 2.8](#) will be enforced.
- 2.00 It is recognized that on-going service and partnering with quality/preferred suppliers can be a mutually beneficial and cost-effective procurement process. However, in the rare circumstance where normal competitive procedures are waived, the reasons must be documented, kept on file, and authorized by the Director, Procurement Services or delegate through Western's electronic requisitioning tool. This process can only be used if an existing non-competitive exemption exists under a trade agreement. Moreover, as a minimum, such arrangements must be reviewed every five years, or as determined by Procurement Services, with the stakeholders.
- 3.00 Procurement Services may enter into co-Procurement ( (00 )]00 )]00 University Policies.
- 4.00 Procurement Services will:
  - (a) consult with the users to establish all requirements and appropriate suppliers, including agreement on appropriate environmental, social, governance, and ethical requirements;
  - (b) be notified and approve any lab exhibitions, supplier and any other related shows/displays involving suppliers on University property;
  - (c) keep abreast of developments in the major commodity fields and provide pertinent information to users;
  - (d) facilitate supplier performance evaluations;
  - (e) identify sources of needed goods and services, select suppliers, obtain quotations and negotiate terms of purchase and payment. Users will be involved in the procurement process;
  - (f) facilitate the procurement of goods and services and provide for customs clearance. The expediting of delivery of goods and services will be managed with the user department on a case by case basis;
  - (g) place orders and arrange details of delivery;
  - (h) handle all adjustments of price and terms for items purchased on Purchase Orders;
  - (i) interpret and apply all applicable government regulations including customs and appropriate taxes;
  - (j) incorporate environmental, social, governance, and ethical criteria into the supplier selection process where applicable;  
and

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- (k) Where feasible, ensure suppliers sign and commit to compliance with the Supplier Code of Conduct.

5.00 The competitive bid process may take the form of telephone quotations, written Request For Quote, written Request For Proposal, Tender or by electronic open bid system. The most appropriate method will be decided by Procurement Services in conjunction with the user and/or as required by law. Guidelines for competitive pricing, considering Procurement Value, are:

- Up to \$25,000 - at the discretion of Procurement Services
- \$25,001 to \$75,000 - two verbal quotes minimum, three preferable with the awarded quote documented in writing
- \$75,001 to \$121,200 - minimum of three formal quotes
- Over \$121,200 - competitively bid through an electronic open bid system or, in the rare case, non-competitively bid with appropriate documentation.

Purchases made from the Facilities Management Vendor of Record program require the following minimum competitive bidding requirements:

Threshold	Minimum Invitation to Bid Requirements
Up to \$25,000	One quote



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