

FN 3.00	FINANCIAL ACCOUNTABILITY		
FN 2.40 Procurement of Goods and Services			
APPROVED BY: Executive Director		DEVELOPED BY: Manager of Finance & Administration	
APPROVAL DATE:		REVISION DATE:	
SUPERSEDES:	New	APPLIES TO:	All Employees / Students

PROCEDURE

- 1.0 The Society will post all procurement opportunities that meet or exceed the dollar threshold in the table below, on an electronic tendering system accessible to all suppliers across Canada

Goods & Services	\$100,000
Construction	\$250,000

2.00 **Approval Authority Schedule – non capital operating expenses**

Commitment Authority Amount	Approval Authority
\$0 to \$100	Worker
\$0 to \$1,000	Coordinator/Supervisor
\$0 to \$5,000	Senior Manager
\$0 to \$100,000	Executive Director
\$100,000 or more	Board of Directors

3.00 **Approval Authority Schedule – Consulting Fees**

Method	Procurement Value	Approval Authority
Invitational Competitive	\$0 - \$100,000	Manager of Finance and Administration / Executive Director
Open Competitive	Any value	Manager of Finance and Administration
Non-Competitive	\$0 - \$999,999 \$1,000,000 or more	Executive Director Board of Directors

4.00 Approval Authority Schedule – Goods and Non-Consulting and Construction

Total Value	Means of Procurement	Recommended/Required
\$0 to \$99	Petty Cash/ Cheque Requisition	Recommended
\$0 to \$1,000	Credit Card/ Cheque Requisition	Recommended
\$0 to \$9,999	Purchase Order	Recommended
\$10,000 to \$99,999	Invitational Competitive	Recommended
\$100,000 or more	Open Competitive	Required

5.00 Competitive Process

The Manager of Finance and Administration will be assigned as procurement lead, to ensure that the procurement process is conducted in an ethical, lawful, and effective manner.

6.00 Timelines

Suppliers will be provided with a minimum response time of 15 calendar days for procurement of goods and services valued at \$100,000 or more.

7.00 Communication

Communication will be carried out by way of an Addendum and Question-and-Answer page. All communication will be posted in the same manner as the competitive procurement documents.

Addenda's will be posted 7 days prior to the closing date. If an addendum is issued within 7 days, the bid submission date will be moved accordingly.

The Society will not communicate with suppliers after the closing date, on matters related to the competitive procurement process unless clarifying a bid or to notify the successful supplier.

When the successful supplier is determined, unsuccessful suppliers will be informed in writing of the outcome, where the procurement value is \$100,000 or more.

Debriefing will be offered to unsuccessful suppliers. Unsuccessful suppliers will be provided with 60 calendar days, following the award notification, to request a debriefing.

Debriefing details will be included in the competitive procurement documents, including the process to request a debriefing.

During a debriefing, the Manager of Finance (or delegate) will provide a general overview of the evaluation process; discuss the strengths and weaknesses of a supplier's submission; provide suggestions on how to improve future submissions; and address questions raised by the supplier.

8.00 Bid Receipt

Bids that are submitted in hard-copy format must be stamped on receipt with the following information: Date, time, location, company name, contact information.

Bids must not be opened until the closing date.

The process for opening the bids will be outlined in the competitive document, and the process followed.

9.00 Evaluation

Evaluation criteria will be developed, reviewed and approved by the Manager of Finance and Administration prior to the commencement of the competitive procurement process.

The competitive procurement will clearly outline any mandatory rated and other criteria used to evaluate submissions, including the weight of each criteria.

Criteria used may include price, quality, quantity, transition costs, delivery, servicing, environmental consideration, capacity of supplier to meet the requirement of the procurement, experience, and financial capacity of the supplier. The maximum weight will be allocated to the price/cost component of the evaluation.

An evaluation team will be assembled to review and rate the compliance of bids. Evaluation team members will sign a Conflict-of-interest declaration, and non-disclosure of confidential information agreement.

Each evaluation team member will complete an evaluation matrix rating each submission. Evaluation records will be retained in the procurement file.

The submission receiving the highest evaluation score and that meets all mandatory requirements set out in the competitive procurement will be declared the winning bid.

10.00 Contract Award

A formal contract award notification letter will be sent to the supplier selected in the competitive process.

A formal agreement will be defined by way of a signed written contract prior to receiving any goods or services.

For procurements valued at \$100,000 or more, contract award notifications will be posted in the same manner as the procurement documentation. The notification will include the name of the successful supplier, and the Agreement start and end date.

11.00 Non-Competitive Process

Prior to the commencement of a non-competitive procurement, supporting documentation will be completed and approved by the Executive Director, or delegate.

A non-competitive procurement process may be used, upon approval, where an unforeseeable situation of urgency exists; where goods and services are confidential in nature and an open tender may compromise government confidentiality; where construction materials are being purchased and transportation costs impose geographic limits on the available supply base; where compliance with the Directive's tendering provisions would interfere with the entities' ability to maintain security; and in the absence of a receipt of any bids in response for a call for proposals or tenders made in accordance with the Directive.

A signed written contract will be provided prior to the supplying of goods or services. Contracts will include appropriate cancellation and termination clauses.

12.00 Record retention

All procurement documentation will be retained for a minimum of 7 years.

13.00 Bid Dispute Resolution

Bid disputes will be resolved by way of: negotiation, mediation, or arbitration

Cross-Reference

[The Broader Public Sector Procurement Directive, 2011](#)