



## POLICY 2.8 – Procurement of Materials and Services

This policy, and all goods and services procured on behalf of the University, must be in accordance with all applicable domestic and international trade agreements and federal and provincial legislation.

Authority thresholds are in Canadian dollars, or equivalent, at the date of the transaction or initiation of an agreement or contract.

### II. DEFINITIONS

*Approval Authority:* the authority delegated by the University to an individual to approve, on its behalf, one or more procurement functions within the procure-to-pay-cycle up to specified dollar limits subject to the application of legislation, regulations and procedures in effect at such time.

*Competitive Procurement:* a set of procedures for developing a procurement contract through a bidding or proposal process. The intent is to solicit fair, impartial, competitive bids.

*Consultant:* a person or entity that under an agreement, other than an employment agreement, provides expert or strategic advice and related services for consideration and decision making.

*Consulting Services:* the provision of expertise or strategic advice that is presented for consideration and decision making.

*Employee:* typically on payroll, with deductions made at the source. An individual may be hired on a full-time or part-time, temporary or permanent basis. The University maintains the right of direction and control over the employee's actions, has the power to dismiss the individual, and provides the tools and equipment for the job.

*Invitational Competitive Procurement:* any form of requesting a minimum of three (3) qualified suppliers to submit a written proposal in response to the defined requirements outlined by an individual/organization.

*Non-Consulting Service Provider (NCSP):* an individual/company who contracts to provide services, other than consulting services to another individual or business. Examples may include "consultants" such as property brokers, head hunters or trainers.

*Procurement Value:* the estimated total financial commitment resulting from procurement, taking into account optional term extensions.

*Purchase Requisition:* the document created and approved by the user department through Western's electronic requisitioning tool for the purchase of goods and services.

*Purchase Order:* the formal, legally binding document used to purchase goods and services.



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10.00 The following have the authority to commit the University to the expenditure of funds for any one transaction, contract, or agreement up to the limits specified below, taking into account optional term extensions (i.e., service, licensing and maintenance agreements/warranties, and non-consulting services) to:

(a)	Board of Governors	Over \$10,000,000
(b)	Property and Finance Committee	\$10,000,000
(c)	President or Vice-President (Operations & Finance), or, in their absence, the Vice-President (Academic)	\$5,000,000
	Vice-President (Research) for research funded acquisitions. The President may authorize research equipment purchases in excess of this limit, provided the criteria from paragraph 4, Delegation of Authority, are met.	
(d)	Associate Vice-President (Financial Services) or the Associate Vice-President (Institutional Planning & Budgeting)	\$2,500,000
(e)	Director, Procurement Services	\$1,500,000
(f)	Procurement Manager	\$500,000
(g)	Procurement & Contract Specialists	\$250,000
(h)	Procurement Buyers	\$75,000
(i)	Local Business Unit Authorized Personnel	\$25,000

11.00 Ongoing expenses for transactions, contracts and agreements that have already been approved during Western's regular budget approval process can be approved by the President, Vice-President (Operations & Finance) or the Associate Vice-President (Financial Services) without limit. The nature of these ongoing expenses is such that they are planned for and expected in order to operate the university (e.g., insurance, telecommunications, supplies).

12.00 The tendering and purchase of utilities (electricity, natural gas, and water) is administered by Facilities Management with the support of Procurement Services. Contracting for electricity and natural gas will occur using a competitive bidding and review process. The authority to sign contracts with suppliers is as follows:

(a)	Associate Vice-President (Facilities Management) and Director, Procurement Services	\$4,000,000
(b)	Vice-President (Operations & Finance) or President	over \$4,000,000

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### RELATED DOCUMENTS AND OTHER RESOURCES

Accessibility for Ontarians with Disabilities Act (AODA)

<https://www.ontario.ca/laws/statute/05a11>

Broader Public Sector (BPS) Accountability Act

<https://www.ontario.ca/page/broader-public-sector-accountability>

Broader Public Sector (BPS) Procurement Directive

<https://files.ontario.ca/tbs-bps-procurement-directive-en-2023-08-23.pdf>

Canada-European Union Comprehensive Economic and Trade Agreement

<http://www.international.gc.ca/gac-amc/assets/pdfs/publications/European-Union-Government-Procurement-Guide-ENG.pdf>

Canadian Free Trade Agreement

<https://www.cfta-alec.ca/>

Technology Risk Assessment

<https://trac.uwo.ca>