

 CAPILANO UNIVERSITY		PROCEDURE	
Procedure No.		Officer Responsible	
B.313.1		Vice-President, Finance and Administration	
Procedure Name:			
Procurement Procedure			
Policy This Procedure is Under			Date of Next Policy Review
B.313 Procurement Policy			June 2026
Date Issued	Date Revised	Related Policies, Reference	
December 13, 2023	New	B.213 Travel and Business Expenses B.215 Spending and Signing Authority E.401 Sustainability	

1. PURPOSE

1.1 The purpose of B.313 Procurement Policy is to:

- a) establish a framework for Capilano University (the “University”) to follow leading public sector supply chain management practices to ensure best value for its expenditures while maintaining the University’s stated values and commitments and taking into account applicable trade agreements and other legislation and regulations.
- b) adhere to the Procurement Principles (including Social Procurement values) which the University has committed to follow;
- c) outline the roles of those organizational positions with procurement responsibilities; and
- d) clarify which types of expenditures are exempt from the application of the policy and standard procurement processes.

1.2 This purpose of this procedure to provide guidance s when purchasing goods and services, including submitting a request; planning, preparing, and issuing solicitation documents; conducting evaluations; and contract awarding processes.

2. DEFINITIONS

The definitions contained in B.313 Procurement Policy are applied to this procedure. A full lexicon of procurement related terms is included in the Glossary of Procurement Terms available on the Purchasing and Procurement Frontlines pages.

3. SCOPE

These procedures apply to the University’s acquisition of all goods and services, including services, infrastructure, construction, capital expenses and equipment, by purchase, lease, or rental, with the University’s funds from all sources.

4. PROCEDURES

4.1 Procurement Services is the University’s dedicated group with the expertise to advise departments on competitive bid methods, contracting options and supplier relationships and may be contacted at any time for assistance with procurement-related initiatives. Procurement Services team members are trained in public procurement, including the laws governing competitive bidding in Canada. Specialist legal expertise will be sourced by the Procurement Services team as and when needed.

Procurement Rules

4.2 The following rules apply to all acquisitions of goods and services:

- a) Procurement Services must be consulted and if it is determined that a competitive bid is required, Procurement Services will:
 - i. provide tailored guidance and support; and
 - ii. manage the entire competitive bidding process to best meet the needs of the project and/or department that initiated a procurement process;
- b) The following procurement thresholds are applicable. Transactions must not be split in order to avoid triggering procurement processes:

PROCUREMENT THRESHOLDS				
	COLUMN A	COLUMN B	COLUMN C	COLUMN D
	DIRECT PURCHASING PERMITTED	2 WRITTEN QUOTES RECOMMENDED	2 WRITTEN QUOTES REQUIRED	OPEN TENDER REQUIRED
Goods and Services (other than for Construction)	Up to \$4,999.99	\$5,000 - \$49,999	\$50,000 - \$74,999.99	\$75,000+
Construction		\$5,000 - \$99,999.99	\$100,000 - \$199,999.99	\$200,000+

- c) The [B. 215 Spending and Signing Authority Policy](#) and related [Procedure](#) apply to all purchases of goods and services and any associated contract(s) may only be signed by the appropriate signing authority, or their delegate, if applicable.
- d) Regardless of their monetary value, certain categories of goods and services are restricted from being acquired and must not be purchased by departments. Instead, these must be obtained through Procurement Services or the following groups:

- i. *Information Technology*: to ensure compatibility with existing equipment and support capabilities, all purchases that include a technology component must be approved by the Chief Information Officer or their delegate. Technology and Communications Technology components include, but are not limited to, software, desktop or server computers, peripherals, telecommunication devices, networking devices, display devices (projectors and televisions) as well as related services (including cloud-based services), and support and maintenance; and
 - ii. *Facilities*: building construction and renovations, and the purchase of furniture and vehicles must be approved by the Associate Vice President Facilities and Campus Planning or their delegates
- e) Documentation relating to quotations and purchases must be collected and retained by the requesting department in accordance with the University's records management practices.
- f) A Purchase Order is required for all purchases, except for the following:
- i. direct purchases made using the Purchasing Card;
 - ii. individual purchases under a Continuing Service Order; or
 - iii. purchases of items under the Exempt Expenditures section below.

Purchasing requisition forms used to set up purchase orders should be requested from Procurement Services. Complete purchasing requisition forms must be submitted to purchasing@capilanou.ca together with proof of approval by the appropriate signing authority for the purchase and all supporting documentation (e.g. invoices, quote, contract, statement of work, etc.). Emails should have the purchasing requisition number in the subject line.

Purchases valued less than the Open Tender Required Threshold

4.3 In accordance with the thresholds shown in Section 4.2b) purchases with values shown in Column A, B, and C, may be purchased through direct purchase for lower value purchases, after obtaining two written quotes for mid value contracts or through an open tendering process for higher value purchases.

- a) **Direct Purchases:** University employees are permitted to purchase goods and/or services valued up to the amount shown in Column A of Section 4.2b), without Procurement Services oversight provided that:
- i. sufficient funds are available for any purchases made;
 - ii. purchases being made are in accordance with [B. 215 Spending and Signing Authority Policy](#) for the cost centre to be charged;
 - iii. purchases are not for restricted items described in Section 4.2d) and
 - iv. third party contracts or agreements are not involved.

The use of a University purchasing card (P-card) is recommended. Alternatively, the supplier can provide a direct invoice which must be sent to Accounts Payable for processing. Details of the goods and services to be supplied must be clearly set out on the invoice.

b) Mid-Value Contracts:

- i. If purchasing goods and/or services valued between the amounts shown in Column B of Section 4.2b), two quotes are recommended as best practice. Procurement Services can provide support with developing a Request for Quotation as this is the most efficient means of establishing a price for widely distributed homogeneous products and or services.
- ii. If purchasing goods and/or services valued between the amounts shown in Column C of Section 4.2b), departments are required to obtain at least two quotes prior to placing an order, to make sure that goods and/or services with competitive quality and pricing are purchased.

Purchases valued over the Open Tender Required Threshold

- 4.4 The use of a competitive tender makes sure that the procurement of goods and/or services, in all contexts, including construction works is fair, equitable, transparent, and competitive.
- 4.5 In accordance with the thresholds shown in Section 4.2b), goods and services valued over the threshold shown in Column D must be advertised on the University's designated public tendering board, BC Bid in order to provide transparency and comply with the intent of the Canada Free Trade Agreement and the New West Partnership Trade Agreement. Contracts should be awarded to the party offering the best value and be consistent with the required quality and service as stated in the procurement request.
- 4.6 Procurement Services has developed a detailed [Guide to Competitive Bidding](#) which clearly sets out responsibilities and the steps in the competitive bid process; additionally, expert guidance, templates and facilitation are provided to support departments through the competitive bid process. The entire competitive bid process generally takes 8-12 weeks to complete. Departments are encouraged to contact Procurement Services as early as possible to ensure sufficient time for planning and conducting the competitive bidding processes.

4.7 *Continuous Standing Orders*

Departments requiring the ongoing supply of goods or services can set up a Continuous Standing Order at the beginning of the fiscal year with the support of Procurement Services. Where a CSO is in place an individual purchase order is not required for each order. CSOs may only be put in place on an annual basis but can be reviewed and amended as needed throughout the year.

4.8 *Social Procurement Value Implementation*

- a) The University aims to embed procurement practices that positively impact inclusivity, equity, and diversity, reduce environmental impact and have a positive effect on First Nation Peoples. When developing requirements and evaluation criteria attention should be paid to the potential social outcomes and community benefits that may be realized, in line with the Social Procurement Values set out in the Procurement Policy. Procurement Services can provide assistance in developing relevant social procurement criteria and establishing appropriate weighing for use during evaluation.

- b) Competitive bidding processes are not mandated when dealing with social enterprises. This does not waive the University's obligations to ensure value for money and formal quotations should still be solicited from a minimum of two vendors. However, it does give the University a level of discretion in making decisions that support Social Procurement Values and help develop and sustain diverse and healthy communities.

4.9 Service Contracts

Regardless of the procurement thresholds, anytime services (including consulting services) are to be provided to the University, those wishing to purchase services must send a request to Procurement Services to draft a contract based on the University's standard form services agreement or review any form of contract proposed by the supplier. The following information must be provided in a request:

- a) a description of the services to be provided including any specific deliverables;
- b) full legal name and contact information of the Supplier;
- c) start and end dates for the contract;
- d) payment schedules; and
- e) any documents shared by the Supplier including quotations, invoices or agreements.

Either a standard University service contract will be created, or the Supplier's form of contract may be approved with or without amendment, or in some circumstances a contract may be written specifically for the service. Services must not be provided without a signed contract in place and the Supplier's form of contract for services must not be entered into before the contract has been reviewed by Procurement Services and any issues identified have been resolved.

WorkSafeBC Coverage and Safety

4.10 Suppliers are required to have a current and active account with WorkSafeBC and may be required to maintain minimum levels of insurance including as determined by the University. Prior to the issuance of any service contract and corresponding PO, Procurement Services will confirm WorkSafeBC standing and/or insurance requirements have been met. Exceptional insurance and WorkSafeBC coverage arrangements may be agreed where the service provider is a single individual and is providing a specialist service to the University.

4.11 Prior to performing services for the University, all Suppliers, including contractors and subcontractors must review the [Capilano University Safety Guidelines](#) and provide to the Manager, Safety and Emergency Management for review and approval, their Safe Work Procedures for the activities to be performed.

Exempt Expenditures

4.12 Although the following expenditures will not require the submission of a Purchase Requisition to Procurement Services and/or selection through a publicly posted competitive bid process, departments are encouraged to consult with Procurement Services for guidance before making these purchases:

- a) services provided under a contract of employment;
- b) goods for resale by the Bookstore;

- c) books and subscriptions by the Library or Bookstore;
- d) individual travel and related expenses for University business. See [B.213 Travel and Business Expenses Policy](#);
- e) treasury, investment, and tax consulting services;
- f) legal services;
- g) memberships;
- h) rental and lease of real property;
- i) hosting, meetings and conference expenses;
- j) petty cash reimbursements;
- k) utilities and postage;
- l) purchases made under the University issued P-card if made below the threshold set out in Section 4.2(b) above. More guidance is provided in the [P-card Program Procedures Manual and FAQ](#).
- m) engaging artistic personnel for The BlueShore Financial Centre for the Performing Arts;
- n) purchases made under a Blanket Purchase Order or Supplier Arrangement; and
- o) industry standard exceptions, which for the purposes of this Procedure are those procurements listed in Article 504, Section 11 of the Canadian Free Trade Agreement, and Part V: Exceptions, Sections A through H of the New West Partnership Trade Agreement.

Disputes

4.13 All complaints and disputes related to any solicitation process, including contract awards, will be managed by the Procurement Leader, in accordance with the provisions set out in the relevant procurement documents and/or contracts.

Disposals

4.14 All disposals of University assets must be overseen by the Procurement Leader. No direct sales of surplus equipment to University employees is allowed. Auctions through a third party may be used from time to time.

5. DESIGNATED OFFICER

The Director, Risk Management is responsible for the development, subsequent revisions to and operationalization of this procedure under the oversight of the Vice-President, Finance and Administration.

6. ASSOCIATED GUIDANCE

Purchasing Services provides extensive guidance to support the procurement process on the Purchasing and Contract Services pages on Frontlines, including the Guide to Competitive Bidding and the P Card Program Procedures Manual & FAQ.

7. REFERENCES AND PROFESSIONAL STANDARDS

Excise Tax Act (Canada)

Freedom of Information and Protection of Privacy Act (British Columbia)

Sale of Goods Act (British Columbia)

University Act (British Columbia)

New West Partnership Trade Agreement

Canada-United States-Mexico Agreement

Canada-European Union Comprehensive Economic and Trade Agreement