CAPILANO UNIVERSITY

PROCEDURE

B.313.1 Procurement

Effective Date: October 13, 2026

Authorizing Policy(s):

B.313 Procurement

Finance

QUICK NAVIGATION

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1. PURPOSE

1.1 This procedure supports B.313 Procurement Policy (the "Policy") and provides directions on Procurement processes including:

a) determining contract value and applying Procurement thresholds,

b) Procurement restrictions and exemptions

c) steps involved in the purchase requisition process;

d) planning, preparing, and issuing Competitive Procurement documentation and conducting evaluations;

e) contract development, review, approval and amendment;

f) managing Supplier complaints; and

g) disposal of surplus goods.

2. DEFINITIONS

2.1 The definitions found in the Policy are used in this procedure.

2.2 A longer lexicon of procurement-related terms is provided in the Glossary of Procurement Terms available on the Procurement Frontlines pages.

3. SCOPE

The Scope set out in the Policy applies to this procedure.

4. PROCEDURAL STEPS

Procurement Thresholds

4.1 The following procurement thresholds apply to all Procurement activities. Transactions must not be split in order to avoid triggering a threshold:

Table 4. Procurement Thresholds

	Low Value Purchases	Intermediate Value Purchases	Mid Value Purchases	Higher Value Purchases
Requirement	**Direct Purchasing Permitted**	**One Written Quote (Two Recommended)**	**Two Written Quotes**	**Competitive Procurement**
Goods and Services (other than for Construction	Under $2,500	$2,500 - $49,999	$50,000 - $74,999.99	$75,000+
Construction		$2,500 - $99,999.99	$100,000 - $199,999.99	$200,000+

All Purchases

4.2 When determining the Procurement value, the following must be considered:

a) the entire scope of the opportunity including but not limited to products, services, licensing, installation, maintenance and updates; and

b) the entire estimated value of the opportunity including:

i) fees, expenses, and other remuneration; and

ii) all potential options for extensions or renewals

4.3 Regardless of their monetary value, certain categories of goods, services or construction are defined as restricted and may only be procured by the following groups:

a) To ensure compatibility with existing equipment and support capabilities and manage cyber security risk, all Procurement that includes a technology component must be led by Digital Technology Services. This includes, but is 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;

b) Procurement related to building construction, renovations and the purchase of vehicles and

c) furniture must be led by Facilities Services and Campus Planning.

4.4 Departments planning to procure services that involve Suppliers (including Suppliers that are independent contractors) providing one or more individuals to work directly with the University should consult with People Culture and Diversity before submitting the Purchase Requisition to check for conflicts with collective agreements and receive advice on next steps (including Workday set up if required).

4.5 With the exception of Low Value Purchases, Purchase requisitions (also known as PRs) must be completed in Workday with associated supporting documentation (including quotations and statements of work) uploaded. Procurement will review the information provided and complete a risk assessment before determining whether Competitive Procurement processes are required and if not whether a Contract is needed or if a Purchase order (also known as a PO), with a link to the University General Terms and Conditions is sufficient.

Low Value Direct Purchases

4.6 Low value direct purchases can be made without the need to submit a purchase requisition:

a) using the Purchasing Card with the process managed as an expense within Workday;

b) with vendor invoices processed by Accounts Payable

Other Permitted Direct Purchases

4.7 Direct purchasing is also permitted without Procurement involvement for:

a) individual purchases under an established Continuing Service Order; and

b) the Purchase of goods for resale by the Bookstore and other departments approved to act as University resellers, which only require budget holder approval.

4.8 Capital assets (as defined in B.218 Capital Assets Policy) may not be purchased without a purchase requisition.

4.9 Procurement may grant approval for specific departments to make direct purchases (including with a Purchasing Card) for up to a value of $5,000 on an exceptional basis where operational challenges can be evidenced by the relevant administrator. Exceptions will be granted by the Procurement Manager in consultation with Accounts Payable for specific goods or services on a time-limited basis. Procurement Services will track and report exceptions at least annually.

Intermediate-Value Procurement

4.10 Procurement in the Intermediate Value category as set out in the Procurement Threshold Table, requires one written quote, with two quotes recommended as best practice.

Mid-Value Procurement

4.11 Procurement in the Mid-Value category, as set out in the Procurement Threshold Table requires a minimum of two written quotes, to ensure competitive quality and pricing.

Competitive Procurement

4.12 If the total value of the opportunity exceeds the Higher Value threshold in the Procurement Threshold Table, Competitive Procurement is required. Procurement Services must be consulted and will:

a) provide tailored guidance and support; including on the development of requirements and the evaluation criteria and process; and

b) manage the entire Competitive Procurement process to best meet the needs of the project and/or department that initiated the Procurement process.

4.13 The opportunity must be posted on BC Bid and the University's designated public tendering portal in order to provide information to all potential Suppliers in a transparent non-discriminatory manner.

4.14 Procurement Services has developed a detailed Guide to Competitive Bidding which clearly sets out responsibilities and the steps in the Competitive Procurement process; additionally, expert guidance, templates and facilitation are provided to support departments through the Competitive Procurement process.

4.15 The end-to-end Competitive Procurement process generally takes 8-12 weeks to complete. Departments are encouraged to contact Procurement Services as early as possible to ensure sufficient time to plan and conduct the process.

Direct Awards

4.16 The University has developed a Direct Award process to allow the awarding of a Contract to a specific Supplier for Mid- and Higher Valued Purchases in where one or more of the specific and exceptional circumstances outlined below apply:

a) the Supplier is a public sector organization (including a ministry, crown corporation, municipality, publicly funded post-secondary academic institution, school board or health authority) or a non-profit organization;

b) when only one supplier is legally, technically, or practically capable of providing the required goods, services, or construction. No other supplier can meet the University's specifications or requirements;

c) when multiple suppliers are available in the market, but the University selects one specific supplier because that supplier alone can meet the University's operational, compatibility, or continuity requirements

d) an unforeseeable emergency exists, and the goods, services or construction cannot be obtained in time if the Competitive Procurement Process is used;

e) Competitive Procurement would interfere with the University's ability to maintain security or order or to protect human, animal or plant life or health; or

f) The acquisition is of a confidential or privileged nature and disclosure through a competitive procurement process could reasonably be expected to compromise university confidentiality, cause economic disruption or be contrary to the public interest.

4.17 Advance approval is required. To initiate a Direct Award, a Direct Award Request must be submitted, using the Procurement portal. The request must be supported by a clear rationale for the deviation and evidence of value for money. All requests will be reviewed by the Procurement Manager. Approval for Mid-value Direct Awards where a comparative quote is not available will be made by the Director, Risk Management. The use of a Direct Award for a Higher Value purchase without the use of a Competitive Procurement process must be risk assessed by the Director Risk Management and approved by the Vice-President Finance and Administration. The Direct Award Request Guideline provides guidance on the full Direct Award process.

4.18 If the value of the Direct Award exceeds the threshold for Competitive Procurement, the University may issue a public Notice of Intent (NOI). If responses are received, the University must evaluate them and proceed with a competitive process if another qualified supplier is identified.

Continuous Standing Orders

4.19 Departments requiring the ongoing supply of goods, services or construction may consult with Procurement Services to set up a Continuous Standing Order (CSO) at the beginning of the fiscal year. Procurement thresholds apply. Where a CSO is in place individual purchase requisitions and orders are not required unless the CSO value is exceeded. CSOs may only be put in place on an annual basis but can be reviewed and amended as needed throughout the year.

Pre-Qualified Supplier Lists

4.20 Pre-Qualified Suppliers Lists may be created to more efficiently procure services when the need for the service can be identified in advance and Competitive Procurement processes can be used to set up arrangements with selected Suppliers that then can be called on as required. The Pre-Qualified Suppliers List Protocol describes how Pre-Qualified Suppliers will be engaged at the University.

New Supplier Verification

4.21 If a new Supplier is to be engaged, a New Supplier Request must be submitted through Workday. Before submitting the purchase requisition, departments should use Workday's search functionality to verify whether the Supplier already exists in the system. Procurement Services will complete Supplier verification, checking that the Supplier:

a) has provided their full legal business name, physical address and contact information;

b) is legally registered with a valid business number; and

c) has a current and active account with WorkSafeBC

4.22 After the Procurement verification checks are completed Accounts Payable will approve the new Supplier and add financial information.

Contracts

4.23 When goods, service) or construction are to be provided to the University, Procurement Services will provide an appropriate Contract based on the information provided in either Procurement portal requests or Purchase Requisitions and attached documents.

4.24 If the Supplier requests changes be made to the University Contract or requires that their own agreement is used instead Procurement will coordinate a Contract review Services must not be provided without a signed Contract in place and Supplier provided Contracts must not be entered into before the Contract review has been completed and any issues identified have been resolved. Contracts may only be signed by the appropriate Signing Authority as set out in B.215 Spending and Signing Authority.

4.25 If the Contract includes a clause indemnifying the Supplier this needs to be reviewed and approved by the BC Government Risk Management Branch before it is signed.

WorkSafeBC Coverage, Insurance and Safety

1. Suppliers are required to have a current and active account with WorkSafeBC and maintain minimum levels of insurance as determined by the University and set out in the Supplier Contract. Exceptional insurance and WorkSafeBC coverage arrangements may be agreed where the Supplier is a single individual, is providing a specialist service to the University, and there are no alternative Suppliers available. Prior to the issuance of the Contract or PO, Procurement Services will complete Supplier verification including confirmations of WorkSafeBC standing and insurance validity.

4.26 Prior to performing services for the University, all Suppliers, must:

a) provide their Safe Work Procedures for the activities to be performed to Safety and Emergency Management Services for review and approval;

b) ensure that any of their workers and those of any subcontractors who will be performing services on University Property or Premises under Contract with the University adhere to the Capilano University Safety Guidelines; and

c) ensure that all workers report to University security when they arrive on site every day

Terms of Payment

4.27 The University's standard terms of payment are net 30 days from receipt of invoice or goods, whichever is later. The use of a Contract that includes advance payment to a Supplier will only be approved by Procurement Services when the requisitioning department can evidence that:

a) the supply of the goods, services, or construction cannot be made by an alternate Supplier with less stringent payment terms;

b) no alternative goods, services or construction will meet the University's needs; or

c) special discounts can be obtained; and

d) the Supplier is assessed to be financially stable, reliable, and able to fulfill the Contract.

4.28 The requisitioning department is also required to provide the following details:

a) the basis on which the advance payment will be considered earned; and

b) the method by which the advance payment will be recovered if the contracted goods or services are not provided.

4.29 Procurement Services will bring any significant advance payments to the attention of the relevant Signing Officer during the Contract review process for approval before the Contract is signed

Contract Amendments

4.30 If a department identifies the need to make a change to an executed Contract a request for advice and support, including the justification for the proposed change(s) to be made should be sent to Procurement Services, who will provide an appropriate Contract amendment document to be shared with the Supplier. Amendments must maintain the original nature and intent of the Contract. Supplier provided Contract amendment documents may only be used after Procurement Services review and approval. A change order must also be submitted in Workday.

4.31 If the proposed Contract amendment is likely to result in the approved maximum Contract amount to be exceeded, Procurement Services will assess whether a new procurement process is required or if the Direct Award process may be applicable. and both the Contract amendment and new total Contract value (not just the incremental change) must be approved by the applicable Signing Officer

Supplier Performance Management

4.32 Supplier performance must be actively monitored throughout the life of the Contract. Departments are responsible for verifying and confirming the receipt of goods, services, or construction in Workday. Any concerns regarding performance must be promptly identified, documented, and communicated to the Supplier. Additionally:

a) the Supplier must be notified in writing of any significant performance issues or deficiencies in a timely manner; and

b) early termination of a Contract must not occur without consultation and guidance from Procurement Services.

Exempt Goods, Services or Construction

4.33 The purchase of the following goods, services or construction does not require the use of a Competitive Procurement process regardless of financial value. Departments are encouraged to consult with Procurement Services for guidance if they are unsure whether a planned purchase falls into one of these categories:

a) goods for resale by the Bookstore or other University reseller;

b) books and subscriptions by the Library or Bookstore;

c) treasury, investment, and tax consulting services;

d) insurance, auditing and legal services;

e) memberships;

c) utilities and postage;

d) engaging artistic personnel for The BlueShore Financial Centre for the Performing Arts;

e) and other exceptions 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 (links to the Agreements are provided on the Procurement Frontlines website).

Supplier Complaints and Dispute Management

4.34 All supplier complaints and disputes related to the Procurement processes, including Contract awards, must be submitted in writing and sent by email to purchasing@capilanou.ca. Complaints and disputes will be managed in accordance with the dispute-resolution process outlined in the applicable solicitation documents or in the relevant Contract's terms and conditions.

4.35 Complaints must clearly outline the issue, provide relevant background, and include any applicable supporting documentation.

5. DISPOSALS

5.1 The disposal of goods (including but not limited to computers, audio-visual equipment, office furniture, marine and industrial equipment, lighting and tools, vehicles and portable classrooms but excluding goods purchased for retail) that are identified as being surplus to University needs should be competed in a coordinated manner overseen by the Procurement Manager in order to maximize the value to the University. When departments identify goods that are surplus to their needs, a request should be sent to Procurement Services who will provide advice and guidance on the disposal process, including liaising with Financial Services to ensure that appropriate financial accounting processes are followed.

5.2 The direct sales of surplus goods to University employees is not allowed. Auctions through a third party may be arranged from time to time.

5.3 Departments declaring goods as surplus are responsible for ensuring the items have been prepared for disposal, including all completing disconnections from any foundations or utilities and the proper securing of any hazardous materials, and are ready to be picked up.

5.4 In the case of media devices and other computer technology items that may be capable of storing data including but not limited to: personal computers, laptops, smart devices (including iPhones, Tablets, Android devices or any other type of cell phone), servers, multi-function devices, fax machines, data backup tapes, tape drives, memory sticks, floppy disks, hard drives, CDR R/W, DVD R/W Digital Technology Services is responsible for ensuring all stored data has been wiped out prior to disposal.

6. ADMINISTRATOR

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

7. ASSOCIATED POLICIES

B.213 Travel and Business Expenses Policy

B.213.1 Travel and Business Expenses Procedure

B.215 Spending and Signing Authority Policy

B.215.1 Spending and Signing Authority Procedure

B.506 Standards of Conduct Policy

B.218 Capital Assets Policy

B.517 Conflict of Interest Policy

OP. 220 Purchasing Card Policy

8. SUPPORTING GUIDANCE, FORMS AND TEMPLATES

8.1 Procurement Services provides extensive guidance to support the Procurement process on the Procurement Services pages on the Universities intranet, including:

the Guide to Competitive Bidding;

Direct Award Guidance; and

the Pre-Qualified Suppliers List Protocol

8.2 The purchasing process is supported by:

a) the Workday ERP. Guidance and training materials are available on the Enterprise Resource Planning (ERP) Project Frontlines page.

b) the procurement portal, for procurement related requests including contract review, direct award requests, request to initiate competitive procurement processes, and for general procurement related requests and advice.

9. REFERENCES

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

10. PROCEDURE HISTORY

Table 11. Procedure History

Version	Effective date	Date Approved	Approval Body	Description of Changes
1	December 13, 2023	December 13, 2023	SLC	New procedure created to support the new B.313 Procurement Policy
2	October 13, 2026	October 13, 2026	SLC	Updated to align with Workday implementation, revise procurement thresholds and purchasing requirements, and enhance guidance for contracts, direct awards, and supplier management.