**Procurement Process**

Consider if your procurement activity involves Consulting Services or Goods and Non-Consulting Services

<table>
<thead>
<tr>
<th>Consulting Services</th>
<th>Goods or Non-Consulting Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>❚ Expert advice and guidance</td>
<td>❚ Westman’s Standard Procurement Processes Apply Policy 2.8 Purchase of Materials and Services</td>
</tr>
<tr>
<td>❚ Assessment without implementation</td>
<td>❚ Consultation and/or decision making</td>
</tr>
<tr>
<td>❚ Strategic advice, thinking, guidance or plans</td>
<td>❚ Strategic advice, thinking, guidance or plans</td>
</tr>
<tr>
<td>❚ Consideration and/or decision making</td>
<td>❚ Consideration and/or decision making</td>
</tr>
</tbody>
</table>

**Process**

- **Invitational Competitive Procurement Process**
  - Purchase value under $100,000, excluding taxes
  - Invite 3 bidders

- **Open Competitive Procurement Process**
  - Must be used if purchase value of $100,000 or greater, excluding taxes
  - Optional if purchase value under $100,000, excluding taxes

**Exemption Eligibility**

- **Verify single or sole sourcing situation**
- **Verify exemption under the Agreement on Internal Trade**
  - Perform necessary due diligence
  - Complete appropriate exception form if bypassing competitive procurement process
  - Approve single or sole sourcing per Section 14 of the Related Procedures of Policy 2.8-(Approval Authority Schedule)
    - President (purchase value under $1,000,000)
    - Board of Governors (purchase value of $1,000,000 or greater)

**Quick Links:**
- Policy 2.8 – Procurement of Materials and Services
- Exemption Form (if procurement value is between $10,000 and $100,000, excluding taxes)
- Exemption Form (if procurement value is greater than $100,000, excluding taxes)
- Agreement on Internal Trade Exemptions
- Consulting/Non-consulting Services – Examples
- Procurement Card (P-Card) Program
# Core Procurement Workflows

<table>
<thead>
<tr>
<th>Competitive</th>
<th>Non-Competitive</th>
<th>Informal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Competitive or Invitational Competitive</td>
<td>Single or Sole Source</td>
<td>Purchase Value Under $10,000</td>
</tr>
</tbody>
</table>

- **Purchase Need Identified**
- **Planning**
- **Requirements**
- **Competitive Document (RFP/RFA)**
- **Blackout Period & Bid Receipt**
- **Evaluation**
- **Agreement**
- **Award Notification**
- **Vendor Debriefing**
- **Document Retention**
- **Purchase Need Identified**
- **Planning**
- **Requirements**
- **Quote**
- **Evaluation**
- **Exception Form Executed**
- **Agreement**
- **Award Notification**
- **Document Retention**
- **Purchase Need Identified**
- **Planning**
- **Requirements**
- **Quote**
- **Evaluation**
- **Agreement**
- **Document Retention**
### Core Procurement Workflows

<table>
<thead>
<tr>
<th>Competitive</th>
<th>Non-Competitive</th>
<th>Informal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Open Competitive or Invitational Competitive</strong></td>
<td><strong>Single or Sole Source</strong></td>
<td><strong>Purchase Value Under $10,000</strong></td>
</tr>
<tr>
<td>Purchase Need Identified</td>
<td>Purchase Need Identified</td>
<td>Purchase Need Identified</td>
</tr>
<tr>
<td>Planning</td>
<td>Planning</td>
<td>Planning</td>
</tr>
<tr>
<td>Requirements</td>
<td>Requirements</td>
<td>Requirements</td>
</tr>
<tr>
<td>Competitive Document (RFP/RFA)</td>
<td>Quote</td>
<td>Quote</td>
</tr>
<tr>
<td>Blackout Period &amp; Bid Receipt</td>
<td>Evaluation</td>
<td>Evaluation</td>
</tr>
<tr>
<td>Evaluation</td>
<td>Exception Form Executed</td>
<td>Exception Form Executed</td>
</tr>
<tr>
<td>Agreement</td>
<td>Agreement</td>
<td>Agreement</td>
</tr>
<tr>
<td>Award Notification</td>
<td>Award Notification</td>
<td>Document Retention</td>
</tr>
<tr>
<td>Vendor Debriefing</td>
<td>Document Retention</td>
<td>Document Retention</td>
</tr>
<tr>
<td>Document Retention</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>