

Procurement Process

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

Consulting Services	Goods or Non-Consulting Services
<ul style="list-style-type: none"> ➤ Expert advice and guidance ➤ Assessment without implementation ➤ Strategic advice, thinking, guidance or plans ➤ Consideration and/or decision making 	<ul style="list-style-type: none"> ➤ Western's Standard Procurement Processes Apply Policy 2.8 Purchase of Materials and Services
Process	Process
<ul style="list-style-type: none"> ❖ Invitational Competitive Procurement Process <ul style="list-style-type: none"> • Purchase value under \$121,200, excluding taxes • Invite 3 bidders ❖ Open Competitive Procurement Process <ul style="list-style-type: none"> • Must be used if purchase value of \$121,200 or greater, excluding taxes • Optional if purchase value under \$121,200, excluding taxes 	<ul style="list-style-type: none"> ❖ Informal Procurement Process <ul style="list-style-type: none"> • Purchase value under \$25,000, excluding taxes • Select vendor of choice and consider a purchasing card (p-card) transaction, preferred supplier transaction before a purchase requisition ❖ Invitational Competitive Workflow <ul style="list-style-type: none"> • Purchase value between \$25,001 and \$75,000, excluding taxes • Invite 2 to 3 bidders • Accepted quote must be in writing ❖ Invitational Competitive Procurement Process <ul style="list-style-type: none"> • Purchase value under \$121,200, excluding taxes • Invite 3 bidders ❖ Open Competitive Procurement Process <ul style="list-style-type: none"> • Must be used if purchase value of \$121,200 or greater, excluding taxes • Optional if purchase value under \$121,200, excluding taxes
Exemption Eligibility	Exemption Eligibility
<ul style="list-style-type: none"> ❖ Verify single or sole sourcing situation ❖ Verify exemption under CETA and CFTA agreements <ul style="list-style-type: none"> • 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) <ul style="list-style-type: none"> ○ President (purchase value under \$2,500,000) ○ Board of Governors (purchase value of \$2,500,000 or greater) 	<ul style="list-style-type: none"> ❖ Verify single or sole sourcing situation ❖ Verify exemption under the CETA and CFTA agreements <ul style="list-style-type: none"> • Perform necessary due diligence • Complete appropriate exception form if bypassing competitive procurement process • Approve single or sole sourcing per Section 12 of the Related Procedures of Policy 2.8- (Approval Authority Schedule) <ul style="list-style-type: none"> ○ One level higher than usual requirement

Core Procurement Workflows

