

# 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"> <li>➤ Expert advice and guidance</li> <li>➤ Assessment without implementation</li> <li>➤ Strategic advice, thinking, guidance or plans</li> <li>➤ Consideration and/or decision making</li> </ul>	<ul style="list-style-type: none"> <li>➤ Western's Standard Procurement Processes Apply Policy 2.8 Purchase of Materials and Services</li> </ul>
Process	Process
<ul style="list-style-type: none"> <li>❖ <b>Invitational Competitive Procurement Process</b> <ul style="list-style-type: none"> <li>• Purchase value under \$100,000, excluding taxes</li> <li>• Invite 3 bidders</li> </ul> </li> <li>❖ <b>Open Competitive Procurement Process</b> <ul style="list-style-type: none"> <li>• Must be used if purchase value of \$100,000 or greater, excluding taxes</li> <li>• Optional if purchase value under \$100,000, excluding taxes</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>❖ <b>Informal Procurement Process</b> <ul style="list-style-type: none"> <li>• Purchase value under \$10,000, excluding taxes</li> <li>• Select vendor of choice and consider a purchasing card (p-card) transaction, preferred supplier transaction before a purchase requisition</li> </ul> </li> <li>❖ <b>Invitational Competitive Workflow</b> <ul style="list-style-type: none"> <li>• Purchase value between \$10,000 and \$25,000, excluding taxes</li> <li>• Invite 2 to 3 bidders</li> <li>• Accepted quote must be in writing</li> </ul> </li> <li>❖ <b>Invitational Competitive Procurement Process</b> <ul style="list-style-type: none"> <li>• Purchase value under \$100,000, excluding taxes</li> <li>• Invite 3 bidders</li> </ul> </li> <li>❖ <b>Open Competitive Procurement Process</b> <ul style="list-style-type: none"> <li>• Must be used if purchase value of \$100,000 or greater, excluding taxes</li> <li>• Optional if purchase value under \$100,000, excluding taxes</li> </ul> </li> </ul>
Exemption Eligibility	Exemption Eligibility
<ul style="list-style-type: none"> <li>❖ <b>Verify single or sole sourcing situation</b></li> <li>❖ <b>Verify exemption under CETA and CFTA agreements</b> <ul style="list-style-type: none"> <li>• Perform necessary due diligence</li> <li>• Complete appropriate exception form if bypassing competitive procurement process</li> <li>• 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"> <li>○ President (purchase value under \$2,500,000)</li> <li>○ Board of Governors (purchase value of \$2,500,000 or greater)</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>❖ <b>Verify single or sole sourcing situation</b></li> <li>❖ <b>Verify exemption under the CETA and CFTA agreements</b> <ul style="list-style-type: none"> <li>• Perform necessary due diligence</li> <li>• Complete appropriate exception form if bypassing competitive procurement process</li> <li>• 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"> <li>○ One level higher than usual requirement</li> </ul> </li> </ul> </li> </ul>

## Quick Links:

- [Policy 2.8 – Procurement of Materials and Services](#)
- [Consulting/Non-consulting Services – Examples](#)
- [Procurement Card \(P-Card\) Program](#)

# Core Procurement Workflows

