

	Procurement Policy	
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1. Purpose

The purpose of this Policy is to specify the principles and requirements to be used for the procurement of goods and services to be paid for directly or indirectly by the Canadian Partnership Against Cancer Corporation (the “Partnership”).

The objectives of this Policy are to ensure:

- a) The procurement process is fair, open and transparent.
- b) Probity and accountability and to demonstrate value for money in the expenditure of public fund;

2. Policy

All individuals conducting business on behalf of the Partnership shall undertake the procurement of goods and services in accordance with sound and prudent procurement practices.

This Policy is in effect for all procurements of goods and services by the Partnership.

Where 50% or more of the funding for a procurement initiated by a funding recipient is provided by the Partnership, the funding recipient should use a procurement process that is consistent with the principles of this Policy.

3. Principles

Except as otherwise permitted by this Policy:

- 3.1 Individuals shall conduct all procurements in accordance with this Policy using a process that is fair and transparent and, where required, open and competitive.
- 3.2 Individuals must demonstrate and document that value for money is received for all Partnership expenditures made in connection with procurements.
- 3.3 Individuals must avoid any potential conflicts of interest that may arise in connection with the procurement process and any resulting contracts.
- 3.4 Individuals must avoid creating relationships through the procurement process whereby the Partnership develops an ongoing reliance on a particular vendor when other vendors are available.
- 3.5 This Policy does not apply in circumstances where the Partnership has a corporate supply arrangement for goods or services.
- 3.6 When contracting for services to be performed by individuals working at a research institution (university, hospital, institute, etc.), bids should only be solicited, and contracts only entered into, with the applicable research institution.

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Individuals must manage all procurements and resulting agreements in a responsible manner such that:

- 3.7 The interests of the Partnership and the public are protected;
- 3.8 The business rationale for the procurement is documented;
- 3.9 Funding is in place before the procurement is initiated, e.g. release of procurement documents;
- 3.10 All necessary approvals are obtained;
- 3.11 Requirements are stated in an unbiased manner and in sufficient detail so that resulting bids can be evaluated fairly and compared meaningfully;
- 3.12 Confidentiality is maintained to protect the interests of the Partnership and the bidders;
- 3.13 Vendors and potential vendors are treated equitably and with respect;
- 3.14 Payment is tied to the supply or completion of agreed work or deliverables; and
- 3.15 All required documentation is prepared and retained for audit purposes.
- 3.16 For commonly procured goods or services with values less than \$100,000, the Partnership will use Pre-qualified suppliers, where feasible and established.
- 3.17 A competitive Bid process (e.g., requests for quotations, requests for proposals, requests for standing offers, request for supplier qualifications, etc) shall be used to establish Prequalified suppliers or to select a vendor for such goods or services.
- 3.18 The bidding documents related to each individual Competitive Bid process shall specify provisions for any renewal.
- 3.19 All competitive procurements will assign a minimum weighting of 25% to the financial component.
- 3.20 No one shall prepare, design or otherwise structure a procurement contract, select a valuation method or subdivide a contract so as to avoid a competitive process, or to circumvent any obligation of this Policy.

4. Procurement Methods

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4.1 **Procurements Valued at Less than \$25,000**

Individuals are encouraged to conduct an open competitive procurement, but may procure goods and services valued at less than \$25,000 by inviting proposals or by selecting a specific vendor, subject to the Partnership's delegations of authority and the principles of this Policy.

4.2 **Procurements over \$25,000 but less than \$100,000 - Invitational Competitive Procurement**

Individuals are encouraged to use an open competitive procurement process but must invite competitive proposals from a minimum of three vendors qualified to meet the requirements of the procurement.

4.3 **Procurements over \$100,000 - Open Competitive Procurement**

Individuals must use an open and competitive procurement process for goods or services valued at \$100,000 or more.

The notice of the procurement opportunity must be accessible by appropriate vendors. Acceptable methods include posting to the Partnership's website or releasing through an electronic tendering service such as MERX or Biddingo.

4.4 **Exception Process over \$25,000**

4.4.1. For procurements over \$25,000, individuals require specific approval from the Vice President, Finance and Corporate Services for non-competitive procurements which include:

- a) Single source procurement, where the selected vendor is not the only available vendor for the required goods or services.
- b) Sole source procurement, where the selected vendor is the only known vendor able to meet the requirements for the goods or services.
- c) Urgent procurement, when time and circumstances are such that the normal competitive procurement process is not feasible.

4.4.2. Typically, the written request to approve an exception process should include the following information and justification:

- a) The business requirements for the goods or services (how and what it contributes to the Partnership business).
- b) An assessment of the business impact if the approval is not provided

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- c) The rationale for using a non-competitive procurement process, including an explanation of the circumstances that prevents a competitive procurement process; the qualifications of this vendor and whether this vendor has had previous contracts with the Partnership.
- d) A description of the proposed non-competitive procurement process, competitiveness of the rate of payment; and whether it is one time contract.
- e) A list of the potential pool of vendors that may have responded to a competitive procurement.

5. Agreement Addendums

- 5.1. Any extension(s) to completion date or change(s) to terms of an initial agreement must be approved in advance by the official with approval authority of the initial agreement.
- 5.2. Any increase(s) in an agreement value up to 15% of the initial agreement value must be approved in advance by the official with approval authority for the initial agreement. If the total agreement value exceeds their signing authority approval must be obtained from the next higher approval authority.
- 5.3. Any increase(s) in an agreement value more than 15% above the initial agreement value must be approved in advance by the next higher approval authority.
- 5.4. Agreements that were single sourced, and where the cumulative value is less than \$25,000 can be extended without going through a competitive bid process, if the total cumulative value remains under \$25,000. If the cumulative value will surpass \$25,000, the extension must be approved by the Vice President, Finance and Corporate Services.

6. Authorization Levels

- 6.1. Procurements may be undertaken by the Partnership only after the related funding has been approved by the Board or in accordance with the financial authorization levels (Delegations of Authority Framework) approved by the Board.

AUTHORIZATION	AGREEMENT AMOUNT
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Director	Up to \$50,000
Vice President	Up to \$250,000
CEO	Up to \$1 Million
Board	Greater than \$1 Million

7. Exceptions to Policy

- 7.1 Exceptions to this policy may be made in extenuating circumstances upon approval of the Vice President, Finance and Corporate Services and the CEO.

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