Procurement Process

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

Consulting Services		Goods or Non-Consulting Services	
A A A A	Expert advice and guidance Assessment without implementation Strategic advice, thinking, guidance or plans Consideration and/or decision making	 Western's Standard Procurement Processes Apply Policy 2.8 Purchase of Materials and Services 	
Process		Process	
*	 Invitational Competitive Procurement Process Purchase value under \$121,200, excluding taxes Invite 3 bidders Open Competitive Procurement Process Must be used if purchase value of \$121,200 or greater, excluding taxes Optional if purchase value under \$121,200, excluding taxes 	 Informal Procurement Process 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 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 Purchase value under \$121,200, excluding taxes Invite 3 bidders Open Competitive Procurement Process 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	
*	 Verify single or sole sourcing situation Verify exemption under CETA and CFTA agreements 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 \$2,500,000) Board of Governors (purchase value of \$2,500,000 or greater) 	 Verify single or sole sourcing situation Verify exemption under the CETA and CFTA agreements 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) One level higher than usual requirement 	

Core Procurement Workflows

Competitive	Non-Competitive	Informal
Open Competitive or Invitational Competitive	Single or Sole Source	Purchase Value Under \$25,000
Purchase Need Identified	Purchase Need Identified	Purchase Need Identified
Planning	Planning	Planning
Requirements	Requirements	Requirements
Competitive		+
Document (RFP/RFA)	Quote	Quote
→	├	↓
Blackout Period & Bid Receipt	Evaluation	Evaluation
	+	
Evaluation	Exception Form Executed	Agreement
		→
Agreement	Agreement	Document Retention
	—	
Award Notification	Award Notification	
<u> </u>	+	
Vendor Debriefing	Document Retention	
Document Retention		