Procurement Services is responsible for the oversight and management of the Board Policies concerning the Purchase of Materials and Services (MAPP 2.8) and Conflict of Interest (MAPP 3.4) procedures and processes for Western. A large part of our role is to ensure Western is compliant with the Broader Public Sector Accountability Act (2010) and associated Procurement Directives.

Western’s Procurement Policy 2.8 and Supplemental Procedures are located here:

Mission Statement

Procurement Services facilitates the best-value procurement of goods and services in support of the research community and the campus at large through the use of strong procurement skill sets, solid win-win supplier negotiations, exemplary customer service and exceptional knowledge of procurement standards and guidelines.

Mustang Market

Mustang Market is Western’s web-based purchasing system. It replaces the requisitioning tool in PeopleSoft and moves these functions into a graphical, easy to use interface that streamlines the purchasing process.

Using Mustang Market, you can search for and buy many products such as:

- Office Supplies
- Electronics
- MRO
- Scientific Supplies
- And more

Mustang Market provides a variety of benefits, including:
- Direct access to negotiated contracts with our preferred vendors
- A simplified interface that streamlines shopping
- Approve or decline a requisition from a smartphone
- Submit invoices online for payment

*Purchase orders should be issued in advance of receiving goods and/or services. Without a valid purchase order issues with shipping, customs and payment can delay receipt of your goods. Western is not legally obligated to pay for good or services that have been obtained without a purchase order being issued in advance.*

**Visa Purchasing Card (P-Card):**

The Visa purchasing card allows you to obtain your goods quickly and pay for them immediately while providing you the flexibility to make purchases at your convenience.

The Visa purchasing card is the preferred method of payment for purchases under $5000. The card may be used at any authorized vendor who accepts Visa. There is no cost to you to use this program.

For more information please visit: [http://www.uwo.ca/finance/purchasing/pcard.html](http://www.uwo.ca/finance/purchasing/pcard.html) or contact us at pcard@uwo.ca.

*Items under $100 cannot be processed in Mustang Market and we recommend paying for these low dollar purchases on your p-card

**Standing Orders**

Standing orders are issued when a product or service is being provided by the same vendor on an ongoing and regular basis. Examples of this include regularly scheduled deliveries of supplies or scheduled maintenance.

Most often, these types of payments can be processed on a Visa purchasing card (p-card) and the vendor can bill your credit card for the payments. There are times where a credit card is not an appropriate method of payment therefore a standing order must be used.

Standing orders can be created and managed inside of Mustang Market. Details can be found in the Mustang Market training guides or by contacting procurement@uwo.ca.
Systems Contracts

Procurement Services has negotiated contracts with a number of vendors for products and services regularly used by the Western community.

The majority of these vendors can be found on the home page of Mustang Market and include products such as computers, stationery supplies and lab supplies.

A complete listing of our systems contracts can be found on the Procurement Services website: http://www.uwo.ca/finance/purchasing/suppliers.html

Competitive Bid Process Requirements

The Board of Governors Policy 2.8 (Purchase of Materials and Services) clearly outlines the requirements for the competitive bidding process. The competitive bid process may take the form of telephone quotations, written Request for Quote, written Request for Proposal, or by OBS (electronic “Open Bid System”). The most appropriate method will be decided by Procurement Services in conjunction with the user and/or as required by law.

Guidelines for the requirements to obtain competitive pricing are:

- Up to $10,000 - at the discretion of the Procurement Services Buyer
- $10,001 to $25,000 - two verbal quotes minimum, three preferable with the awarded quote documented in writing
- $25,001 to $100,000 - minimum of three formal quotes, five preferably, or advertised tenders preferably from a pre-qualification process
- Over $100,000 - competitively bid through an open electronic system or, in the rare case, sole sourced with appropriate documentation (refer to Section 3.00 of 2.8 Procurement of Materials and Services-Procedures)

An open, competitive process must be conducted for consulting services\(^1\) regardless of value. Approval from the appropriate authority is required for each process and must be completed prior to commencement. Any exemptions must be in accordance with the applicable trade agreements.

- $0 up to, but not including, $100,000 - invitational or open competitive process
- $100,000 or more - open competitive process
- Under $1,000,000 requires a signature from the President
- Over $1,000,000 requires a signature from the President or a Vice-President and the Board of Governors.

\(^1\) Consulting Services means the provision of expertise or strategic advice that is presented for consideration and decision making. (Broader Public Sector Procurement Directive, 2011)
Procurement Services has created a workflow document that will assist in determining whether the services you require are consulting or non-consulting. As per the definition of “consultant” and “consulting services” set by the BPS Procurement Directive, 2011, a large majority of services that were once considered “consulting” would now be considered “non-consulting” and have different approval requirements. Please contact Procurement Services at procurement@uwo.ca if you require clarification.

http://www.uwo.ca/finance/purchasing/docs/workflow.pdf

Departments must not reduce the overall value of procurement (e.g. dividing a single procurement into multiple procurements) in order to circumvent the competitive bidding or approval requirements (refer to Section 15.00 of 2.8 Procurement of Materials and Services-Procedures)

Other Considerations

Sustainability (Sustainable Procurement Guide)
Procurement Services has developed the Sustainable Procurement Guide as a tool to share our recommendation for purchasing products that balance economic, environmental and social benefits.

http://www.uwo.ca/finance/purchasing/docs/Sustainable%20Purchasing%20Guide.pdf

Accessibility

As mandated by the Ontario government on January 1, 2013, accessibility criteria and features must be incorporated into all procurement practices. It is the responsibility of each staff or faculty member procuring or acquiring goods, services or facilities to consider and apply the appropriate accessibility criteria to their procurement decisions. If it is not practical to incorporate accessibility criteria or features, you must be ready to provide an explanation upon request.

Units are responsible for reviewing the points below and implementing procurement practices that meet legislated requirements.

http://www.uwo.ca/finance/purchasing/Accessibility.html

Research Finance

Research Finance supports the research community at Western in the financial management of research grants and contracts awarded to individual researchers and to the institution. This unit is involved in a wide scope of activities and provides services that include financial reporting, financial analysis and forecasting, expenditure monitoring, compliance oversight, cash flow management and audit facilitation. Procurement Services works with Research Finance to ensure that funds are utilized in accordance with the terms, conditions and regulations of the funding source and/or policies of the University.
Procurement Post Newsletter

Procurement Services distributes a newsletter quarterly (depending on volume of content). If you wish to receive this newsletter please contact us at procurement@uwo.ca.

Past issues can be found at: http://www.uwo.ca/finance/publications/index.html

Customs & Logistics

**Exporting:**

If you are shipping or exporting anything out of country, you must consult with the Customs and Logistics Team: customs@uwo.ca

Our Customs team will guide you on proper procedure and will assist with exporting documents.

Goods shipped or exported out of Canada are regulated by the Customs Act, Export & Import Permits Act and numerous other legislations. Many Canadian acts and regulations have provisions for international activities. Export reporting to Canada Border Services Agency and Statistics Canada is conducted online through the Customs and Logistics Section in Procurement Services. Export declarations and reports will be completed by the Customs & Logistics Team in accordance with the policies and requirements of Canada and the destination country.

Any required permits and/or licenses must be presented with the shipment prior to export. Additional documentation may be required for goods such as clothing and textiles, toxic and hazardous materials, radio frequency devices and controlled goods.

Goods listed on Canada’s Export Controls list will require an Export Permit. Applications for Export permits are processed online by the Manager of Customs and Logistics.

**Importing:**

Goods arriving from outside the country MUST show The University of Western Ontario as the first line of the “ship to” address. Any required permits and/or licenses must be presented with the shipment prior to import.

If the goods were acquired on a Western purchase order, suppliers receive a copy of our routing order indicating preferred carriers and customs broker information with the purchase order.

Because Western is registered with Canada Customs as an importer, goods generally tend to move smoothly through Canada Customs. All the major carriers (Fed Ex, DHL, UPS, etc.) are instructed to forward shipment documentation to our Customs broker for clearance. Ensuring The University of
Western Ontario is identified on the first line can reduce delays at Customs by limiting confusion on identifying the “importer of record”, which is particularly important for perishable goods.

Failure to properly declare description, value, and country of manufacture for foreign goods can subject Western to significant fines through Canada Customs and Revenue Agency (CCRA) and Administrative Monetary Penalty System (AMPS), and can also trigger a customs audit. Please contact Customs and Logistics for non-purchase order goods that you may be expecting, such as orders purchased on VISA, collaborative research samples, donations, review copies of books, etc.

Resources:

Accessibility: [http://www.uwo.ca/finance/purchasing/Accessibility.html](http://www.uwo.ca/finance/purchasing/Accessibility.html)

Consulting or Non-Consulting Services Workflow Document: [http://www.uwo.ca/finance/purchasing/docs/workflow.pdf](http://www.uwo.ca/finance/purchasing/docs/workflow.pdf)

Credit and debit card processing at Western: [http://www.commerce.uwo.ca/](http://www.commerce.uwo.ca/)

Customs & Logistics: [http://www.uwo.ca/finance/purchasing/customs.html](http://www.uwo.ca/finance/purchasing/customs.html)


Visa Purchasing Card (P-card): [http://www.uwo.ca/finance/purchasing/pcard.html](http://www.uwo.ca/finance/purchasing/pcard.html)
## Contacts

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Email: [procurement@uwo.ca](mailto:procurement@uwo.ca)