

Procurement Policy & Procedures

PURPOSE

The purpose of this policy is to ensure that our purchase of goods and services for the performance of ISANS adhere to the following principles:

- **Fair competition:** ISANS treats all bidders with fairness and ensures that they are given the same level of information when preparing quotations or tenders
- **Conflict of Interest:** Any conflict of interest should be declared to ISANS in accordance with this policy
- **Cost effectiveness:** ISANS will evaluate quotations and tenders not only on competitiveness in pricing but also on factors such as the quality of the products/services, track records of the bidders, and alignment with ISANS values
- **Accountability:** ISANS is accountable to funding partners and the public for any procurement involving the use of government funding

CONFLICT OF INTEREST

All board members, employees, volunteers, or agents who are engaged in any aspect of procurement are expected to conduct themselves in a professional and ethical manner, maintaining high standards of integrity and the use of good judgment. No employee, board member, volunteer or agent of ISANS shall participate in the selection, award or administration of a bid if a conflict of interest is real or apparent to a reasonable person.

- Conflicts of interest may arise when any employee, board member, volunteer or agent of ISANS has a financial, family or any other beneficial interest in the vendor firm selected or considered for an award.
- No employee, board member, volunteer or agent of ISANS shall either solicit or accept gratuities, gifts, consulting fees, trips, favors or anything having a monetary value from a vendor, potential vendor, or from the family or employees of a vendor, potential vendor or bidder.

RESPONSIBILITY

ISANS Managers are responsible for determining whether a purchase is allowable taking into consideration funding restrictions. They will also ensure purchases are in accordance with this policy. The Director of Operations is available to provide support or advice upon request. ISANS Managers will be responsible for ensuring confidentiality in the procurement process.

PROCUREMENT PROCEDURES

1. The Manager will:

- Review the appropriate funding agreement and applicable regulations to ensure that the goods or services to be purchased or contracted are allowable prior to procurement
- Determine the price of the procurement and follow the appropriate procedures. A purchase shall not be split into multiple smaller purchases in order to avoid the approval/documentation process.
- Attempt, where possible, to identify immigrant-owned small businesses that may be able to provide the good or services.
- Responsible and accountable at all stages for the procurement of goods and services for his/her team.

2. Documentation and authorization requirements for procurements

- **Purchases under \$1,000:** The Manager will authorize the purchase following the procurement principles, policy and procedures.
- **Purchases \$1,000 to \$3,000:** Obtain a minimum of 2 written quotations. The Manager will authorize the purchase.
- **Purchases \$3,000 to \$10,000:** Obtain a minimum of 2 written quotations. The Manager will make a recommendation to the Director of Operations. The Director of Operations will authorize the purchase. A copy of the 2 quotations and selected vendor's invoice must be submitted to Finance Department for payment.
- **Purchases \$10,000 and over:** Obtain quotations/proposals in writing via a formal Request for Proposal (RFP). Manager evaluates and analyzes the proposals, and makes a recommendation in writing to the Director of Operations. The Director of Operations will authorize the purchase. A copy of all written bids, written recommendation, and the selected vendor's invoice must be submitted to Finance Department for payment.

3. Request for Proposal (RFP)

Any purchase over \$10,000 will be via an RFP, prepared by the Manager and posted on ISANS website. The RFP will include:

- Purpose
- General information, including any deadlines
- Statement of work, specifications, requirements, milestones and deliverables
- Bid/proposal preparation and submission instructions
- Evaluation criteria
- Award notification
- Instructions for budget and estimated pricing
- Any special terms and conditions
- Required vendor certifications

4. Sole Source Procurements

Sole source procurement is when ISANS chooses a vendor for purchases of more than \$1,000 without an open competition. This will only be used as a last resort. The Manager must document the reason(s) for not following the usual procurement process and submit these reasons together with the vendor's invoice to Finance Department for payment.

Sole source procurement should only be used if:

- Only one response was received to request for quotations
- The vendor has unique or prior experience that makes them the only one capable of providing the goods or services.
- The goods or services are needed urgently and there is insufficient time to complete the usual procurement process.