

MEMORANDUM

To: Deans and Senior Leaders

From: Gitta Kulczycki, Vice President Finance and Administration

Date: July 30, 2021

Re: New Procurement Policy

I am pleased to announce that Dalhousie’s revised University Procurement Policy is now approved and available on the website.

The revised policy supports Dalhousie’s new Strategic Plan, Third Century Promise, by increasing efficiency through more streamlined requirements for lower-value purchases, while placing more accountability on employees involved in the procurement of goods and services.

The policy will allow us to balance the requirements for best value for purchases through an open, equitable and transparent process for vendors, while also ensuring our people have the flexibility and authority to move forward efficiently on initiatives that align with our mission.

The following is a summary of the highlights and changes in the new policy:

1. Changes in Thresholds for Procurement of Goods and Services:

Thresholds for public tenders: The University is required to comply with legislation and trade agreements (Nova Scotia Procurement Act, Atlantic Trade and Procurement Partnership, Canadian Free Trade agreement). The thresholds for public tenders in these agreements has been increased and the policy has been adjusted accordingly.

	Previous	Revised
Goods	\$25,000 +	\$105,700 +
Services	\$50,000 +	\$105,700 +
Construction	\$100,000 +	\$264,200 +

Revised Lower Dollar Value Thresholds: Lower-level thresholds are determined internally by the University and increases in these thresholds will reduce effort in procuring goods and services. The new thresholds compared with policy at other U15 Universities.

	Previous	Revised
Pcard for purchases up to:	\$3,000	\$10,000
Requirements for quotes:		
1 quote	<\$10,000	<\$25,000
2 quotes	n/a	\$25,000 to \$49,999
3 quotes	>\$10,000	\$50,000 up to the tendering thresholds above

The changes to the thresholds for tender and requirements for quotes will be implemented immediately and there will be further communication on the change to the Pcard thresholds, which will be implemented shortly.

2. Accountability for Procurement Activities:

The University is responsible to act (and be seen to act) in a fair, equitable and transparent manner for all university procurement and the changes in the thresholds require that more responsibility and accountability be placed on employees for procurement activities.

Employees involved in procuring goods and services will need to familiarize themselves with the new policy, which provides a clearer articulation of responsibilities of all employees when procuring University goods and services. The Procurement Code of Conduct has been updated and faculty and staff members involved in procurement activities are accountable to the code of conduct.

3. Procurement Reviews:

Purchases above certain dollar value thresholds require review by the AVP Financial Services or by the Vice-President Finance and Administration to confirm that the procurement has met policy requirements. Consistent with the other thresholds that have been increased, these thresholds have been updated to reduce the number of purchases requiring higher level review, which will also speed up the process.

4. Dalhousie's EDIA commitments:

The new policy incorporates updates in line with the university's commitment to Equity, Diversity, Inclusion and Accessibility, including:

- a. outreach to goods and service providers that have been historically underrepresented.
- b. requirement to identify and reduce the barriers that limit the participation of marginalized vendors.

These changes to the policy will allow for easier purchasing with fewer requirements and approvals as well as clearer information on responsibilities and requirements for procuring goods and services.

If you have any questions, please do not hesitate to contact Susan Robertson, Assistant Vice-President Financial Services or Monty Thibeault, Director of Procurement (acting).