

Procurement Services: Quick Reference

As a [Broader Public Sector institution](#), the university must follow compliant procurement processes. This requirement is outlined in our [Procurement Policy](#), Ontario's [Broader Public Sector \(BPS\) Procurement Directive](#), relevant trade agreements, and other legislation.

Need help? ProcurementServices@cunet.carleton.ca

Roles

Procurement Services supports the compliant acquisition of goods and services across the university by ensuring open, fair, and transparent procurement processes.

The **purchasing department or researcher** should:

1. Know what you want to buy, including minimum requirements or specifications;
2. Follow the [Procurement Policy](#) (e.g. **don't split purchases** to lower the total value); and
3. Comply with the [Supply Chain Code of Ethics](#) (e.g., avoid statements or actions that imply a vendor is preferred before the process is complete, **including as part of grant proposals**).

Plan Your Procurement

1. Follow the rules

- Use the correct [Means of Procurement](#) (e.g. quotes) based on [Total Value](#).
- Follow the [Provincial Policies](#).
- Consider other processes and stakeholders (e.g. [Facilities Management & Planning](#))

2. Understand Risk

Review our [risk assessment questions](#). Procurement Services will facilitate negotiations between relevant campus stakeholders and your vendor as required.

3. Contracts: Establish the Vendor Relationship

[Signing a Contract](#) without proper authority may expose the university to significant risk.

Total Value	Means of Procurement	Contract
<\$25,000 CAD	You can choose to use a PCard (<\$10,000) or Cheque Requisition	No university contract will be issued
<\$121,200 CAD	Submit a Purchase Requisition in eShop with all required documents	Standard Terms & Conditions
\$121,200+ CAD	Submit a request for resourcing	A robust contract will be negotiated

Did you know? Research Agreement vs. Procurement

If funds will be transferred from a Primary Investigator's (PI's) institution to another institution, it is **not** usually "procurement". If your agreement includes any hourly rates or payment for specific deliverables, you may be engaging in procurement, and all rules apply.

Limited Tendering Exceptions (Sole Source)

- Within the circumstances allowed by our trade obligations, you may seek approval to not follow the Procurement Policy using a [Limited Tendering Justification form](#).
- LTE is a non-competitive process and **cannot be used to**
 - Avoid competition,
 - Discriminate against vendors by giving preference to existing vendors, or
 - For the university's convenience (faster process, avoiding the need to change vendors, etc.).

Tips for drafting your Limited Tendering Justification Form (LTJF)

1. Start by selecting a relevant [Exception Code](#). These are the only available options.
2. Complete LTJF Sections 1-4 in full.
3. Draft your Justification (Section 3.2) with information that supports the Exception Code **only**.
4. Use layperson's terminology so a non-expert can understand what you are buying and why.

LTE's for procurements >\$121,200 CAD may require additional processes, especially if the source of funding is a CFI grant.

Resources

- [Customs Information](#)
- [FACTS How-to information for eShop](#)
- [Other Financial Services Departments](#) (e.g. Accounts Payable)
 - [Payments to a Small Business or Individual](#)
 - [Receipting your Purchase Order](#)