## GOODS, AND GOODS RELATED SERVICES

<table>
<thead>
<tr>
<th>PROCUREMENT CONTRACT VALUE</th>
<th>COMMITMENT TYPE</th>
<th>NUMBER OF QUOTES</th>
<th>METHOD OF PURCHASE - QUOTE TYPE</th>
<th>LEAD TIME GUIDELINE (WORKING DAYS)</th>
<th>COMMITMENT ISSUED BY (CONTRACT EXECUTION)</th>
<th>SPECIAL CONDITIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$2,500 per item or aggregate. Except Restricted Items as per Purchasing Policy FM5105 (1750)</td>
<td>Petty Cash, Purchasing Card, Credit Card, Debit Card (Purchase Order Optional)</td>
<td>One Written Quote, Invoice, or Credit Card or Cash Register Receipt (rotate Suppliers). Two where practical</td>
<td>Telephone, fax, e-mail, written, in person</td>
<td>Delegated to Departments - Article 1.3 Purchasing Policy FM5105 (1750)</td>
<td>Delegated (Signing Authority Policy FM5100 (1002))</td>
<td>Receipts required with payment claim and monthly reconciliation statement. Purchase Order optional. Individuals obtaining quotations and making purchases (value &lt;$2,500) MUST USE the same practices and procedures as does Purchasing Services (obtain competitive quotations and retain these on file for audit purposes)</td>
</tr>
<tr>
<td>&gt;$2,500 &lt;$10,000 per item or aggregate</td>
<td>Purchase Order</td>
<td>Minimum of three where practical</td>
<td>Written (fax or e-mail) Directed Award Form completed for sole/single source request</td>
<td>3 - 5 days</td>
<td>Purchasing Officer, Assistant Purchasing Officer</td>
<td>Rotate Suppliers that are invited to quote.</td>
</tr>
<tr>
<td>&gt;$10,000 &lt;$25,000 per item or aggregate</td>
<td>Purchase Order</td>
<td>Minimum of three where practical, unless posted on BCBid</td>
<td>RFQ/RFP(1 page Spec.) Directed Award Form completed for sole/single source request</td>
<td>5 - 10 days</td>
<td>Director, Purchasing Services or Purchasing Officer</td>
<td>Full list of potential Suppliers when less than 8 in marketplace, BCBid not required, but recommended for market coverage.</td>
</tr>
<tr>
<td>&gt;$25,000 &lt;$50,000 per item or aggregate</td>
<td>Purchase Order</td>
<td>Posted on BCBid</td>
<td>ITT/RFQ/RFP (Full Specs.) Directed Award or Notice of Intent if deemed a requirement by Purchasing</td>
<td>5 - 10 days</td>
<td>Director, Purchasing Services, or Purchasing Officer (Initialed by Director)</td>
<td>Full list of potential Suppliers when less than 8 in marketplace, and posted on BC BID electronic bid board.</td>
</tr>
<tr>
<td>&gt;$50,000 &lt;$200,000 per item or aggregate</td>
<td>Purchase Order or Agreement</td>
<td>Posted on BCBid</td>
<td>ITT/RFQ/RFP (Full Specs.) Directed Award or Notice of Intent if deemed a requirement by Purchasing</td>
<td>Min. 2 weeks</td>
<td>Director, Purchasing Services, Assistant Manager, and Executive Director, Financial Services</td>
<td>Full list of potential Suppliers when less than 8 in marketplace, and posted on BC BID and MERX electronic bid boards.</td>
</tr>
<tr>
<td>Not Specified</td>
<td>Corporate Supply Agreement (CSA), Purchase Order, or Long Form Contract</td>
<td>Open Market - Full List</td>
<td>ITT/RFQ/RFP</td>
<td>4 Weeks</td>
<td>Director, Purchasing Services, or as per Signing Authority Policy 1002</td>
<td>Full list of potential Suppliers in marketplace, and posted on BC BID and MERX electronic bid boards.</td>
</tr>
</tbody>
</table>
### UNIVERSITY OF VICTORIA - PURCHASING SERVICES
### SPENDING and COMMITMENT AUTHORITY LEVELS - GUIDELINES

**CONSULTING, TRAINING AND PROFESSIONAL SERVICES (NON - ACADEMIC)**

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<tr>
<td>&lt;$2,500 per item or aggregate, Except Restricted Items as per Purchasing Policy FM5105 (1750) (Articles 1.3, 1.4, and 1.5)</td>
<td>Short Form Contract and/or Purchase Order</td>
<td>Two (rotate Suppliers where practical)</td>
<td>Written</td>
<td>Delegated to Departments - Articles 1.3, 1.4 and 1.5 Purchasing Policy FM5105 (1750)</td>
<td>Delegated (Signing Authority Policy FM5100 (1002))</td>
<td>Require BFRF if personal service. Except where specifically delegated under Purchasing Policy FM5105 (1750). Purchase Order optional. Individuals obtaining quotations and making purchases (value &lt;$2,500) MUST USE the same practices and procedures as does Purchasing Services (obtain competitive quotations and retain these on file for audit purposes)</td>
</tr>
<tr>
<td>&gt;$2,500 &lt;$5,000 per item or aggregate</td>
<td>Short Form Contract and Purchase Order</td>
<td>Two (rotate Suppliers where practical)</td>
<td>Written, Directed Award Form for single/sole source request</td>
<td>2 - 5 days</td>
<td>Director, Purchasing Services, Purchasing Officer</td>
<td>Require BFRF if personal service. Except where specifically delegated under Purchasing Policy FM5105 (1750).</td>
</tr>
<tr>
<td>&gt;$5,000 &lt;$25,000 per item or aggregate</td>
<td>Short Form Contract and Purchase Order</td>
<td>Three where practical (rotate Suppliers where practical)</td>
<td>Written, Directed award form for single/sole source request</td>
<td>2 - 5 days</td>
<td>Director, Purchasing Services, Purchasing Officer</td>
<td>Require BFRF if personal service. Except where specifically delegated under Purchasing Policy FM5105 (1750).</td>
</tr>
<tr>
<td>&gt;$25,000 &lt;$75,000 per item or aggregate</td>
<td>Short Form Contract and Purchase Order</td>
<td>Min. Three (rotate Suppliers where practical)</td>
<td>Written /RFP/RFQ, Directed Award Form for single/sole source request</td>
<td>5 - 10 days</td>
<td>Director, Purchasing Services, Purchasing Officer</td>
<td>Require BFRF if personal service. Except where specifically delegated under Purchasing Policy FM5105 (1750).</td>
</tr>
<tr>
<td>&gt;$75,000</td>
<td>Long Form Contract or Purchase Order</td>
<td>Full List</td>
<td>ITT/RFP/RFQ/IPP, Direct Award/Notice of Intent to Award if deemed a requirement by Purchasing</td>
<td>MIN. 2 WEEKS</td>
<td>Director, Purchasing Services, Assistant Manager, and Executive Director, Financial Services</td>
<td>Require BFRF if personal service. Except where specifically delegated under Purchasing Policy FM5105 (1750). Full list of potential Service Providers or BC Bid Board and MERX where appropriate.</td>
</tr>
</tbody>
</table>

**Note:** On all contracts where confidentiality or intellectual property issues or concerns may be factors; or, where financial, material, safety, infrastructure, or occupational health risks are inherent within the work to be performed, these contracts cannot be entered into, irrespective of the value, without prior review and approval from Purchasing Services.
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<tr>
<td>&lt;$2,500 per item or aggregate</td>
<td>Letter of Engagement and/or Purchase Order</td>
<td>One Written, Preferably two where practical</td>
<td>Written Quotations, fax, e-mail, or in person</td>
<td>Delegated</td>
<td>Manager, FMGT</td>
<td>Invoice or Receipts required. Rotate Suppliers invited to quote.</td>
</tr>
<tr>
<td>&gt;$2,500 &lt;$10,000 per item or aggregate</td>
<td>Letter of Engagement and/or Purchase Order</td>
<td>Two Written Quotes Where Practical</td>
<td>Written, Fax, e-Mail Quotations</td>
<td>Delegated</td>
<td>Manager, FMGT</td>
<td>Rotate Suppliers invited to quote.</td>
</tr>
<tr>
<td>&gt;$10,000 &lt;$25,000 per item or aggregate</td>
<td>Letter of Engagement and/or Purchase Order, Contract and CCDC or Consultant Short Form Agreement</td>
<td>Minimum of three written quotations where practical</td>
<td>ITT/RFQ/RFP/RFQu. Included specifications and contract terms and conditions including RFQ's</td>
<td>5 - 10 days</td>
<td>Executive Director, Facilities management or Director, Purchasing Services</td>
<td>Full list of potential Suppliers in marketplace, or posted on BC Bid to obtain full market coverage.</td>
</tr>
<tr>
<td>&gt;$25,000 &lt;$100,000</td>
<td>Purchase Order, Long Form Contract, and/or CCDC</td>
<td>Minimum of three written quotations or full list where practical</td>
<td>ITT/RFQ/RFP/RFQu. Included specifications and contract terms and conditions including RFQ's</td>
<td>2 - 4 weeks</td>
<td>Executive Director, Facilities management or Director, Purchasing Services</td>
<td>Full list of potential Suppliers in marketplace, and posted on BC Bid electronic bid board recommended.</td>
</tr>
<tr>
<td>&gt;$100,000</td>
<td>Purchase Order, Long Form Contract, and/or CCDC</td>
<td>Minimum of three written quotations or full list where practical</td>
<td>ITT/RFQ/RFP/RFQu. Included specifications and contract terms and conditions including RFQ's</td>
<td>2 - 4 weeks</td>
<td>Executive Director, Facilities management or Director, Purchasing Services</td>
<td>Full list of potential Suppliers in marketplace, and must be posted on BC Bid Board and/or MERX if value &gt;$250,000</td>
</tr>
<tr>
<td>&gt;$250,000</td>
<td>Purchase Order, Long Form Contract, and/or CCDC</td>
<td>Posted on BC Bid, and MERX/GETS. Normally posted through the BC Construction Association Bid Depository</td>
<td>ITT/RFP/RFQu</td>
<td>2 plus weeks depending on the nature of the acquisition</td>
<td>President or VPFO; and Executive Director FMGT</td>
<td>UVic Seal Required</td>
</tr>
<tr>
<td>Change Orders from original Contract</td>
<td>Change Order</td>
<td>Single Source, On-Site Contractor</td>
<td>Written</td>
<td>Delegated</td>
<td>Executive Director, Facilities management or Director, Purchasing Services</td>
<td>First right of refusal from on-site Contractor</td>
</tr>
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