



# Procurement Policy

Department: All Departments  
Policy Number: 006-2026  
Effective Date: May 5, 2026  
Legislative Authority: Municipal Act, 2001, s.271(1); applicable trade agreements;  
Buy Ontario Act, 2024 and Municipal Buy Ontario  
Procurement Directive  
Approved by: Resolution 2026-160  
Review Period:

## Contents

1. PURPOSE: .....	2
2. DEFINITIONS .....	2
3. APPLICATION .....	3
4. EXEMPTIONS .....	4
5. ETHICS AND CONFLICT OF INTEREST .....	4
6. ROLES AND RESPONSIBILITIES .....	5
7. APPROVAL AUTHORITIES .....	6
8. PROCUREMENT METHODS AND THRESHOLDS .....	7
9. OPEN COMPETITION AND POSTING PERIODS .....	8
10. EVALUATION AND AWARD .....	8
11. LIMITED TENDERING / NON-COMPETITIVE PROCUREMENT .....	10
12. EMERGENCY PROCUREMENT .....	10
13. CHANGE ORDERS, CONTRACT EXTENSIONS, AND CONTRACT MANAGEMENT .....	11
14. BUY ONTARIO, TRADE AGREEMENTS, AND ACCESSIBILITY .....	11
15. DISPOSAL OF SURPLUS ASSETS .....	12
16. RECORDS AND REPORTING .....	12
17. SUPPLIER PERFORMANCE .....	13
18. EXCEPTIONS TO THIS POLICY .....	13
19. ADMINISTRATIVE PROCEDURES AND INTERPRETATION.....	13
20. TRANSITION .....	13

## 1. PURPOSE:

1.1 The purpose of this Policy is to:

- a) Promote the most cost-effective and efficient use of Township funds and resources;
- b) Ensure procurements are conducted in a fair, open, transparent, and accountable manner;
- c) Obtain best value through an appropriate balance of price, quality, service, delivery, performance, risk, sustainability, and lifecycle cost;
- d) Establish clear approval authorities, procurement methods, and administrative controls;
- e) Ensure compliance with applicable legislation, trade agreements, provincial directives, and Township policies;
- f) Support practical and proportionate procurement processes based on value, complexity, and risk; and
- g) Maintain public confidence in Township procurement decisions.

1.2 All Township procurements shall be guided by the principles of accountability, transparency, fairness, value for money, compliance, and integrity.

## 2. DEFINITIONS

2.1 In this Policy:

- **Best Value** means the optimal balance of price, total lifecycle cost, quality, service, performance, compatibility, risk, and other relevant factors.
- **Bids and Tenders** means the Township's designated electronic bidding platform.
- **CAO** means the Chief Administrative Officer of the Township or designate.
- **Competitive Procurement** means a procurement process that provides suppliers with an equitable opportunity to compete for Township business.
- **Construction** means construction, reconstruction, demolition, repair, or renovation of a building, structure, road, utility, or engineering works.
- **Consulting Services** means advisory or professional services provided to assist in decision-making, strategy, design, or project execution, excluding legal services.
- **Department Head** means the CAO, Director of Finance/Treasurer and any member of the Township's Senior Management Team, or any other management

employee specifically authorized under this Policy or by the CAO to exercise Department Head authority for procurement purposes.

- **Emergency** means a situation requiring immediate action to prevent or respond to danger to life, health, safety, property, essential services, or significant operational disruption.
- **Evaluation Team** means the Township employees and/or external advisors appointed to evaluate procurement submissions.
- **Finance Coordinator** means the Township staff member assigned primary day to day procurement administration responsibilities under the direction of the Director of Finance/Treasurer.
- **Informal Quotation** means a streamlined competitive process conducted through written quotations, email quotations, or the Township's electronic procurement platform.
- **Limited Tendering / Non-Competitive Procurement** means a procurement where a competitive process is not used, or where fewer suppliers are invited than would normally be required.
- **Procurement Value** means the total estimated cost of the procurement, inclusive of all options, extensions, renewals, contingencies, and applicable taxes net of recoveries or rebates, where reasonably estimable.
- **Purchase Order** means the Township's authorized commitment document for procurement.
- **Request for Proposal (RFP)** means a competitive process used where solutions, approaches, or methodologies may vary and evaluation is based on criteria other than price alone.
- **Request for Quotation (RFQ)** means a competitive process used where requirements are clearly defined and award is normally based primarily on price and compliance.
- **Request for Tender (RFT)** means a formal competitive process used where specifications are clear and award is generally based on lowest compliant bid or best value as defined in the solicitation.
- **Township** means The Corporation of the Township of Wellington North.

### 3. APPLICATION

3.1 This Policy applies to the procurement of all goods, services, consulting services, construction, equipment, software, and related requirements by or on behalf of the Township unless expressly exempted under this Policy.

3.2 The Township's primary electronic procurement platform is Bids and Tenders. Open competitive procurement opportunities shall normally be issued through this platform unless otherwise approved by the Director of Finance/Treasurer or designate.

3.3 Day to day procurement administration shall be coordinated by the Finance Coordinator, under the direction of the Director of Finance/Treasurer.

#### 4. EXEMPTIONS

4.1 The following categories are exempt from the competitive procurement requirements of this Policy, but remain subject to budget approval, financial controls, and any other applicable Township policies:

- a) Borrowing, investing, and banking services;
- b) The acquisition, sale, lease, licence, expropriation, or disposition of land or interests in land;
- c) Legal services, arbitration, mediation, and litigation-related services;
- d) Employment contracts, recruitment, labour relations matters, and payroll remittances;
- e) Employee benefits and statutory remittances;
- f) Utilities, postage, and tariff-regulated services;
- g) Insurance placements and renewals;
- h) Memberships, subscriptions, conference registrations, training, and tuition;
- i) Grants, donations, rebates, and transfer payments made by the Township;
- j) Goods or services acquired under another legislated, judicial, or administrative process; and
- k) Any other exclusion expressly approved by Council or established by law.

#### 5. ETHICS AND CONFLICT OF INTEREST

5.1 Township employees and elected officials shall conduct procurement activities with integrity and in the public interest.

5.2 No employee or elected official shall participate in any procurement activity where they have an actual, potential, or perceived conflict of interest.

5.3 No employee or elected official shall accept gifts, hospitality, favours, or benefits from a supplier where such acceptance may influence, or reasonably appear to influence, a procurement decision.

5.4 Information relating to procurements, evaluations, pricing, negotiations, and recommendations shall be treated as confidential except as required for the proper conduct of the procurement process or by law.

5.5 No procurement shall be divided, restructured, or sequenced for the purpose of avoiding the approval thresholds or procurement method requirements set out in this Policy.

5.6 Vendors participating in Township procurement processes shall:

- a) Fully inform themselves of the procurement requirements and follow all instructions set out in the procurement documents;
- b) Provide accurate, complete, and truthful information to the Township;
- c) Not submit misleading, fraudulent, or materially incomplete information;
- d) Not engage in collusion, bid-rigging, improper influence, or any conduct that compromises the fairness or integrity of the procurement process; and
- e) Disclose any actual, potential, or perceived conflict of interest relating to the procurement.

5.7 The Township may disqualify, suspend, or restrict a vendor from participating in a procurement process, or from future Township procurement opportunities, where the vendor:

- a) Has provided false, misleading, or materially incomplete information;
- b) Has engaged in collusion, improper influence, or other conduct that compromises the integrity of the procurement process;
- c) Is in an actual or unresolved conflict of interest;
- d) Has demonstrated serious or repeated performance deficiencies, including significant health and safety concerns; or
- e) Has otherwise acted in a manner that adversely reflects on the vendor's business integrity, reliability, or ability to perform Township work.

5.7.1 Any decision to disqualify, suspend, or restrict a vendor shall be documented and made by the CAO in consultation with the Director of Finance/Treasurer and, where appropriate, the Township Solicitor.

## 6. ROLES AND RESPONSIBILITIES

6.1 Council shall:

- (a) Approve this Policy and amendments to it;
- (b) Approve budgets and project funding;
- (c) Approve procurements and contracts where required by this Policy; and
- (d) Approve exceptions to this Policy where recommended by staff.

6.2 The Chief Administrative Officer shall:

- (a) Provide overall administrative oversight for procurement governance;
- (b) Approve procurements within delegated authority;
- (c) Concur in shortened posting periods, limited tendering, and policy exceptions where required; and
- (d) Ensure procurement practices support Township service delivery and strategic priorities.

6.3 The Director of Finance/Treasurer shall:

- (a) Be responsible for corporate oversight of procurement compliance;

- (b) Establish procurement procedures, templates, forms, and administrative guidance;
- (c) Oversee the Finance Coordinator's procurement administration role;
- (d) Review procurement recommendations and documentation for compliance;
- (e) Approve procurements within delegated authority;
- (f) Maintain or direct corporate reporting on procurement activity, exceptions, and awards; and
- (g) Interpret this Policy and issue administrative procedures consistent with it.

6.4 Under the direction of the Director of Finance/Treasurer, the Finance Coordinator shall:

- (a) Administer the Bids and Tenders platform;
- (b) Support departments in selecting the appropriate procurement method;
- (c) Maintain standard procurement templates and records;
- (d) Coordinate postings, addenda, closings, and award notices;
- (e) Maintain a central procurement file for formal procurements; and
- (f) Support compliance monitoring and reporting.

6.5 Department Heads or their authorized designates shall:

- (a) Define the business need and procurement scope;
- (b) Confirm budget availability and funding source;
- (c) Prepare specifications, scope of work, evaluation criteria, and recommendations;
- (d) Manage supplier performance and contract administration; and
- (e) Ensure procurements are initiated in sufficient time.

## 7. APPROVAL AUTHORITIES

7.1 Budget approval does not, by itself, constitute authority to award a contract beyond the delegated limits in this Policy.

7.2 The approval authorities set out in **Schedule "A"** are hereby adopted.

7.3 Where a recommended award exceeds the approved budget or delegated approval limit, Council approval is required unless otherwise expressly authorized by this Policy.

7.4 Budget amendments, unbudgeted capital expenditures, or new commitments not already authorized through the budget shall require Council approval identifying the purpose, cost estimate, and funding source.

## 8. PROCUREMENT METHODS AND THRESHOLDS

8.1 The procurement methods and thresholds set out in **Schedule “B”** are hereby adopted.

8.2 The choice of procurement format shall be based on the nature, value, complexity, risk, and market conditions associated with the requirement.

8.3 The Township may use non-binding information gathering tools prior to commencing a procurement process where it would assist in understanding market capacity, available solutions, delivery options, budget considerations, or procurement strategy.

8.3.1 Request for Information (RFI): A Request for Information may be used to obtain market information that will assist the Township in developing specifications, scope, delivery requirements, budget estimates, or procurement strategy. An RFI does not constitute a competitive procurement process and does not create any contractual obligation on the part of the Township.

8.3.2 Request for Expression of Interest (REOI): A Request for Expression of Interest may be used where the Township wishes to assess supplier interest, market capability, or possible delivery approaches before deciding whether and how to proceed with a procurement. An REOI does not constitute a competitive procurement process and does not create any contractual obligation on the part of the Township.

8.4 The Township may use:

- (a) Direct purchase for low value routine requirements;
- (b) Informal quotations for lower value competitive purchases;
- (c) Invitational RFQs for moderate value requirements;
- (d) Open competitions for higher value or higher risk requirements; and
- (e) RFPs where the Township is seeking the best overall solution rather than lowest price alone.

8.5 The Township may participate in cooperative procurements, vendor of record arrangements, framework agreements, and shared service contracts where they provide best value and are compliant with law.

8.6 Without limiting the generality of section 8.5, the Township may utilize existing cooperative purchasing and sector arrangements, including but not limited to Local Authority Services (LAS), Canoe Procurement Group of Canada, Ontario Education Collaborative Marketplace (OECM), and other municipal, public sector, or government purchasing arrangements where such use is permitted and represents best value.

8.7 Where a procurement is made through a cooperative purchasing arrangement, vendor of record, framework agreement, or other shared procurement process that was conducted in a compliant manner and permits Township participation, use of that arrangement shall be deemed to satisfy the Township’s competitive procurement requirements, provided that:

- (a) The originating procurement process was undertaken by a public sector or other recognized entity using a fair, open, and transparent process, where required;
- (b) The Township is eligible to participate in or access the arrangement;
- (c) The procurement represents best value to the Township; and
- (d) The applicable approval authority under this Policy has been obtained.

8.8 Prequalified Vendors: The Township may establish and maintain lists or pools of prequalified vendors for categories of goods, services, consulting services, or construction where it is beneficial to do so.

8.8.1 Prequalification may be used where the Township wishes to assess in advance a vendor's qualifications, experience, financial capacity, technical capability, health and safety record, or ability to satisfy mandatory requirements.

8.8.2 Where a prequalified vendor list is established, subsequent invitational procurements may be limited to the vendors included on that list, provided the process used to establish the list was fair, open, and transparent where required.

8.8.3 The Township may determine the term, refresh cycle, and administration procedures for any prequalified vendor list.

## 9. OPEN COMPETITION AND POSTING PERIODS

9.1 Open competitive procurements shall be publicly posted on Bids and Tenders for a period that is reasonable having regard to the procurement value, complexity, market conditions, and time required for suppliers to prepare responsive submissions.

9.2 The standard posting guidance set out in **Schedule "C"** shall be used unless otherwise justified and approved.

9.3 A shorter posting period may be approved by CAO or Director of Finance/Treasurer where justified by documented project timing, operational needs, or exceptional circumstances, provided the shortened period still preserves meaningful competition.

9.4 Approval of a shortened posting period for an open competitive procurement requires:

- (a) Written justification from the issuing Department Head or designate; and
- (b) Concurrence from the CAO and Director of Finance/Treasurer.

9.5 Where the rationale for a shortened posting period is weak, highly sensitive, or likely to be contentious, staff should seek Council authorization.

## 10. EVALUATION AND AWARD

10.1 Evaluation criteria and weighting shall be established before the procurement is issued and shall be disclosed in the solicitation where required.

10.2 Formal procurements shall be evaluated by an evaluation team consisting of at least two Township representatives, and more where warranted by the complexity of the requirement.

10.3 The Township may seek written clarifications where permitted by the solicitation and where doing so does not compromise fairness.

10.4 Negotiations are permitted only where the solicitation expressly allows for them, or where a limited tendering or non-competitive process has been properly justified and approved.

10.5 Contracts shall be awarded to the supplier whose submission best meets the requirements of the solicitation and the Township's best value objectives, subject to budget and approval authority.

10.6 The Township may offer debriefings to unsuccessful proponents for formal competitive procurements.

10.7 The Township may require bid security, performance security, labour and material payment bonds, letters of credit, certified cheques, insurance, or other forms of security where appropriate to the value, complexity, and risk of the procurement.

10.8 Bid security shall normally be required for construction tenders and other procurements where the Township would be exposed to material financial, operational, or project-delivery risk if the successful bidder fails to enter into the contract.

10.9 Performance security and labour and material payment security shall normally be required for construction contracts or other contracts involving work on Township infrastructure, facilities, roads, utilities, or other capital assets where non-performance, default, liens, subcontractor non-payment, or delayed completion could materially affect the Township.

10.10 For nonconstruction goods, services, consulting services, and lower-risk procurements, security may be required where warranted by the procurement value, supplier risk, market conditions, advance payments, critical service requirements, warranty obligations, or other project-specific risks.

10.11 The type and amount of any required security shall be specified in the solicitation document.

10.12 The issuing Department Head, in consultation with the Director of Finance/Treasurer, shall determine whether security is required.

10.13 Where a successful bidder fails to execute the contract or provide the required security within the time specified, the Township may cancel the award, retain any bid security to the extent permitted by the solicitation, and proceed in accordance with the procurement documents and applicable law.

10.14 Following approval of an award in accordance with this Policy, contracts and related procurement documents may be executed by the officers authorized under the Township's signing by-law or other applicable Council direction.

10.15 No contract shall be executed unless the applicable approval authority, funding approval, and procurement requirements under this Policy have been satisfied, unless Council has expressly approved otherwise.

## 11. LIMITED TENDERING / NON-COMPETITIVE PROCUREMENT

11.1 A competitive procurement may be waived, limited, or otherwise exempted from the normal competitive process only where justified, documented, and approved in accordance with this Policy.

11.2 Examples of permitted circumstances include:

- (a) An emergency;
- (b) Only one supplier is reasonably capable of meeting the requirement;
- (c) Compatibility or standardization with existing equipment, systems, or services is essential;
- (d) No compliant bids were received through a prior competitive process;
- (e) An existing contract extension represents best value and is permitted by the contract terms or supported by a documented business case;
- (f) Confidentiality, legal risk, or market sensitivity makes an open process impractical;  
or
- (g) Urgency caused by circumstances that could not reasonably have been foreseen and where a competitive process would materially compromise Township interests.

11.3 The limited tendering / non-competitive approval requirements set out in Schedule "D" form part of this Policy.

11.4 A written justification shall be retained in the procurement file for every limited tendering or non-competitive procurement.

11.5 Limited tendering shall not be used for the purpose of avoiding competition, approval thresholds, or open posting requirements.

## 12. EMERGENCY PROCUREMENT

12.1 Where an emergency requires the immediate procurement of goods or services essential to protect life, health, safety, property, essential services, or the public interest, the applicable Department Head may obtain the required goods or services without following the normal procurement process.

12.2 The Department Head shall:

- (a) Use whatever process is practical under the circumstances;
- (b) Notify the CAO and Director of Finance/Treasurer as soon as possible; and
- (c) Submit a written report to Council at the next regular meeting where the value exceeds delegated authority or where reporting is otherwise warranted.

### 13. CHANGE ORDERS, CONTRACT EXTENSIONS, AND CONTRACT MANAGEMENT

13.1 Change orders must remain within approved project budgets and delegated authority.

13.2 Material contract scope changes that significantly alter the original procurement intent require review by the Director of Finance/Treasurer and may require a new procurement process or Council approval.

13.3 Contract extensions are permitted only where contemplated by the original contract, supported by a documented business case, and approved within the applicable authority limits.

13.4 Departments are responsible for contract administration, supplier performance monitoring, and approval of deliverables.

13.5 Contract extensions and amendments shall not be used to expand a contract beyond what was originally contemplated, or to circumvent the need to procure additional deliverables through a competitive procurement process in accordance with this Policy.

13.6 Where a contract amendment or extension is within the general scope of the original procurement, within the approved project budget, and supported by an available contingency or approved funding source, the amendment may be approved in accordance with the original approval authority.

13.7 Where a proposed contract amendment or extension:

- a) adds deliverables, goods, services, or construction not originally contemplated;
- b) materially changes the scope, nature, or intent of the original procurement; or
- c) increases the contract value beyond approved budget or delegated authority,

the matter shall be reviewed by the Director of Finance/Treasurer and may require a new procurement process, a limited tendering justification under section 11, and/or Council approval.

### 14. BUY ONTARIO, TRADE AGREEMENTS, AND ACCESSIBILITY

14.1 The Township shall conduct procurements in compliance with all applicable legislation, trade agreements, directives, and Township policies.

14.2 Where applicable legislation, regulation, directive, or provincial procurement requirement requires the Township to prioritize Ontario or Canadian goods and services, the Township shall structure procurements and evaluations accordingly. The Township shall comply with such requirements as amended from time to time, and the Director of Finance/Treasurer may issue administrative procedures, declarations, forms, and guidance necessary to implement them.

14.3 Except where expressly permitted or required by law or directive, the Township shall not apply local preference.

14.4 In accordance with the Accessibility for Ontarians with Disabilities Act, 2005, the Township shall have regard for accessibility in procuring goods, services, and facilities. Where it is not practicable to do so, the rationale shall be documented.

## 15. DISPOSAL OF SURPLUS ASSETS

15.1 Departments shall first consider internal reallocation of surplus goods or equipment.

15.2 Assets determined to be surplus shall be disposed of in a manner that is fair, transparent, and in the Township's best interest.

15.3 Disposal methods may include public auction, electronic auction, public notice, sealed bids, trade-in, recycling, or scrapping.

15.4 No surplus asset shall be sold directly to a Township employee except through a publicly accessible process open to all bidders.

15.5 The CAO may approve disposal methods for surplus assets, subject to any Council direction.

## 16. RECORDS AND REPORTING

16.1 A procurement file shall be maintained for all formal procurements and any limited tendering or non-competitive procurement.

16.2 Files shall contain, as applicable, the business case, budget confirmation, solicitation documents, addenda, submissions, evaluation materials, approval records, award recommendation, contract, and correspondence.

16.3 Procurement records shall be retained in accordance with the Township's records retention requirements.

16.4 The Director of Finance/Treasurer may report procurement activity to Council on a periodic basis, including, where appropriate:

- a) Formal competitive awards above a prescribed threshold;
- b) Limited tendering / non-competitive procurements;
- c) Emergency procurements;
- d) Shortened posting periods approved under section 9;
- e) Policy exceptions approved by Council; and
- f) Material contract amendments or extensions that exceed the original delegated approval authority.

16.5 Public notice of award may be posted through the Township's electronic procurement platform where required by law, trade agreement, or Township practice.

## 17. SUPPLIER PERFORMANCE

17.1 Departments shall document significant supplier performance issues, including non-performance, repeated deficiencies, or serious health and safety incidents.

17.2 The CAO, in consultation with the Director of Finance/Treasurer and where appropriate the Township Solicitor, may restrict a supplier from future procurement opportunities for a defined period where performance history warrants it.

17.3 Any such restriction shall be documented, proportionate, and defensible.

## 18. EXCEPTIONS TO THIS POLICY

18.1 Council may approve an exception to any requirement of this Policy by resolution.

18.2 Staff reports recommending an exception shall describe:

- (a) The procurement need;
- (b) The section of the Policy for which an exception is sought;
- (c) The reason the exception is requested;
- (d) The funding source; and
- (e) The risk and control implications.

## 19. ADMINISTRATIVE PROCEDURES AND INTERPRETATION

19.1 The Director of Finance/Treasurer may issue or amend administrative procedures, standard forms, templates, bid instructions, evaluation forms, and guidance documents to implement this Policy, provided such procedures do not conflict with Council's approved direction.

19.2 Questions regarding interpretation of this Policy shall be referred to the Director of Finance/Treasurer.

19.3 Where this Policy conflicts with applicable legislation, regulation, trade agreement, grant or funding condition, or other legal requirement binding on the Township, the more restrictive requirement shall apply to the extent of the conflict.

## 20. TRANSITION

20.1 Any procurement process issued prior to the effective date of this Policy may be completed in accordance with the policy, procedure, or procurement rules in effect at the time the procurement was issued.

20.2 Any contract, vendor-of-record arrangement, or procurement commitment established prior to the effective date of this Policy shall remain valid in accordance with its terms, unless otherwise amended, extended, or replaced in accordance with this Policy.

## SCHEDULE "A"

### APPROVAL AUTHORITIES

Role	Approval Authority
Council	Over \$250,000, and all exceptions or awards otherwise reserved to Council
CAO	Up to \$250,000
Director of Finance/Treasurer	Up to \$200,000
Other Department Heads / SMT Members	Up to \$100,000

Approval authority is based on the highest level of approval required for the procurement value, unless this Policy or an administrative procedure requires additional concurrence.

## SCHEDULE "B"

### PROCUREMENT METHODS AND THRESHOLDS

Procurement Method	Procurement Value	Normal Process
Petty Cash / Low Value	Up to \$100	Receipt-based purchase in accordance with petty cash rules
Purchasing Card / Direct Purchase	Up to \$5,000	Direct purchase, with market check where appropriate
Informal Quotation	Over \$5,000 to \$25,000	Minimum of 2 written quotations, where practical
Invitational RFQ	Over \$25,000 to \$100,000	Written competition issued to a minimum of 3 suppliers, where practical
Open Competition (RFT / RFQ / RFP)	Over \$100,000	Publicly posted through Bids and Tenders

## **SCHEDULE “C”**

### **STANDARD OPEN POSTING GUIDANCE**

<u>Procurement Type</u>	<u>Recommended Posting Period</u>
Simple open procurement	Minimum 15 calendar days
Moderate complexity	21–30 calendar days
Major / complex / technical	30+ calendar days as appropriate

A shorter posting period may be used where justified and approved in accordance with Section 9 of this Policy.

## **SCHEDULE “D”**

### **LIMITED TENDERING / NON-COMPETITIVE APPROVALS**

<b>Procurement Value</b>	<b>Required Approval</b>
Up to \$25,000	Applicable Department Head and Director of Finance/Treasurer
Over \$25,000 to \$100,000	Applicable Department Head, Director of Finance/Treasurer, and CAO
Over \$100,000	Council, unless an emergency applies and immediate action is required in accordance with section 12 of this Policy

Every limited tendering or non-competitive procurement shall include a written justification retained in the procurement file.

## **SCHEDULE “E”**

### **LIMITED TENDERING JUSTIFICATION CHECKLIST**

A limited tendering or non-competitive procurement file shall document:

1. Description of the requirement;
2. Estimated value;
3. Funding source;
4. Reason competition is impractical or not in the Township’s best interest;
5. Options considered;
6. Supplier selected;
7. Why the recommended approach represents best value or lowest risk under the circumstances; and
8. Approvals obtained.

## **SCHEDULE “F”**

### **BID IRREGULARITIES AND COMPLIANCE**

The Township may waive minor informalities or irregularities that do not materially affect the procurement process, provided the waiver does not compromise fairness, transparency, or the integrity of the competition.

#### **Automatic rejection**

The following shall normally result in automatic rejection, unless otherwise expressly permitted in the solicitation:

1. Late submissions;
2. Submissions not received through the method required in the solicitation;
3. Bid not properly signed;
4. Missing mandatory pricing where pricing is required;
5. Material qualifications, restrictions, or conditions that alter the submission;
6. Failure to provide mandatory bid security, mandatory forms, mandatory bonds, or mandatory declarations where required; and
7. Submissions that are incomplete in a material way.

#### **Curable / waivable irregularities**

The Township may permit correction, clarification, or waiver of the following where the irregularity is minor and does not prejudice other bidders:

1. Minor clerical or typographical errors;
2. Missing initials beside non-material changes;
3. Missing corporate seal;
4. Failure to acknowledge an addendum that is not material;
5. Mathematical errors, in which case the Township may apply the pricing interpretation rules stated in the solicitation; and
6. Other minor irregularities that do not affect the substance of the submission.

#### **Decision authority**

The issuing Department Head, in consultation with the Director of Finance/Treasurer, shall determine whether an irregularity is minor or material. Where the matter is complex, sensitive, or contentious, the CAO and/or Township Solicitor may be consulted.