

Model Procurement and Contracting Procedures

The first of its kind in Canada, the Procurement School is offering a trade-agreement compliant comprehensive Procurement Procedures Manual designed for Canadian public sector organizations.

Whether you're a small entity operating without a dedicated procurement department or a large organization with centralized procurement processes, our manual is designed to fit your needs seamlessly.

Pain Areas

Our Model Procurement and Contracting Procedures address the following:

- When the organization have no procedures, or more commonly, have a few but not comprehensive centralized procedures then (a) staff do their own thing, (b) no controls in place to ensure integrity of procurement/contracting, (c) no consistency in approach, (d) efficiencies are lost as people constantly ask what am I supposed to do? (e) compliance risks, (f) if no procurement expertise onsite, staff have no guidance on how best to proceed
- Net effect is (a) inconsistency of approach throughout the organization; (b) non-compliance with trade agreements and/or policies; (c) increase in errors; (d) inefficiency of operations; (d) staff frustration caused by uncertainty, addressing mistakes and inefficiencies.

The procedures manual addresses all of this by providing a centralized and comprehensive manual that is easy for staff to understand and use, ensuring consistency and compliance.

Target Audience

- Decision makers, project sponsors, person responsible for the procurement function in any organization: COO, Treasurer, VP Finance, Director Procurement, Procurement Manager, Chief Administrative Officer
- Procurement staff, Department heads, Line managers

Key Components

Step-by-Step Guidance: From procurement planning to end of contract assessment, our manual provides a comprehensive roadmap.

Procurement Process Flowchart and Master Checklist: Simplify complex processes with easy-reference tools.

Procedures and Guides: Navigate every stage of procurement with ease, including strategy design, RFx document selection, information gathering, bid evaluation, debriefing sessions, negotiation, and contract awarding.

Tools and Templates: Access a range of internal approval requests, bidder notifications, and public postings templates to assist with streamlining operations.

Key Features

Expert Development: Crafted by seasoned procurement and legal professionals with extensive experience in Canadian public procurement.

Compliance: Fully compliant with trade agreements, ensuring adherence to legal standards.

Best Practices: Reflects the pinnacle of procurement administration best practices.

Ease of Use: Written in plain English and designed for user-friendliness.

About

Since 1980, The Procurement School has been helping Canadian public sector organizations realize maximum value through their procurement and contracting activities.

Incorporating the latest developments in adult education and curriculum design, our online and blended learning options capture the latest legal, practical, and business developments to empower procurement professionals to improve contract outcomes.

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Ready to revolutionize your procurement process?
Take the first step with a free consultation session. Contact us today.

Contact Us

P: 250-370-0041
E: hello@procurementschool.com
W: <https://procurementschool.com>

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#301 – 1321 Blanshard Street
Victoria, BC V8W 0B6

Customizable: Easily tailor the manual to suit your organization's unique requirements with our comprehensive customization instructions.

Pricing Bundle

Document Number	Document Name (Asterisk means this is intended to be customized by the user based on its systems and practices and is not available as an off-the-shelf procedure)	Price
	PROCEDURES	
P010	Annual Procurement Planning Procedure	\$ 175.00
P020	Developing the Procurement Strategy	\$ 350.00
P025	Low Dollar Value Procurement Procedure	\$ 175.00
P030	Competitive Procurement Procedure	\$ 350.00
P040	Non-Competitive Procurement Procedure	\$ 175.00
P050	Preparing the Scope of Work Procedure	\$ 350.00
P060	<i>Procurement Card Procedure*</i>	
P070	<i>Purchase Order Procedure*</i>	
P080	Contract Preparation and Signature Procedure	\$ 175.00
P090	Contract Negotiation Procedure	\$ 175.00
P100	Purchasing from a Standing Arrangement Procedure	\$ 175.00
P110	Establishing and Using a Prequalified Supplier List Procedure	\$ 350.00
P120	Buying Group Purchasing Procedure	\$ 525.00
P130	<i>Initiating Online RFx Procedure*</i>	
P140	Invitational Competitive Process Procedure	\$ 700.00
P150	Public Competitive Process Procedure	\$ 350.00
P160	RFP Bid Evaluation Procedure	\$ 350.00
P170	Bidder Disqualification Procedure	\$ 350.00
P180	RFx Cancellation Procedure	\$ 350.00
P190	Pre-Contract Verification Procedure	\$ 350.00
P200	Bidder Debriefing Procedure	\$ 350.00
P210	Managing Supplier Complaints Procedure	\$ 350.00
P220	<i>Record Retention Procedure*</i>	
P230	Invoice Processing Procedure	\$ 520.00
P240	Contract Amendment and Extension Procedure	\$ 350.00
P250	Contract Termination Procedure	\$ 350.00
P260	Supplier Suspension Procedure	\$ 700.00
	GUIDELINES	
G010	Defining Initial Contract Term and Options	\$ 525.00
G020	Strategic Sourcing Options	\$ 175.00
G030	Standing Arrangement Guidelines	\$ 350.00
G040	Prequalified Supplier List Guidelines (Multi-Use Lists)	\$ 350.00
G050	Buying Group Guidelines	\$ 350.00

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G060	Pre-RFx Information Gathering	\$ 525.00
G070	Calculating the Procurement Value under Trade Agreements	\$ 350.00
G080	<i>RFx Selection Guidelines*</i>	
G090	Managing Bidder Inquiries	\$ 525.00
G100	<i>Managing Bid Process Irregularities*</i>	
G110	Contract Management Guidelines (Best Practices)	\$ 525.00
G120	Assessing Contract Results Guidelines	\$ 350.00
	TOOLS AND TEMPLATES	
T005	Annual Procurement Plan Template	\$ 175.00
T010	Procurement Process Flowchart	\$ 350.00
T015	Master Procurement Checklist	\$ 350.00
T020	Procurement Strategy Approval Request Form	\$ 350.00
T030	RFx Addendum Template	\$ 175.00
T040	RFx Cancellation Notice Template	\$ 175.00
T050	Evaluator Conflict of Interest and Confidentiality Declaration Template	\$ 350.00
T060	RFP Evaluation Team Scoring Form Template	\$ 350.00
T070	Contract Award Notice - Preferred Bidder Template	\$ 350.00
T080	Contract Award Notice - Unsuccessful Bidder Template	\$ 175.00
T090	Contract Award Notice - Disqualified Bidder Template	\$ 175.00
T100	Contract Award Notice - Public Notice Template	\$ 175.00
T105	Non-Competitive Award - Bidder Communications Template	\$ 175.00
T110	Contract Amendment Template	\$ 175.00
T120	Contract Term Extension Template	\$ 525.00
T130	Notice of Termination - For Convenience Template	\$ 350.00
T140	Notice of Default Template	\$ 175.00
T150	Contract Close-Out Letter Template	\$ 175.00
T160	Competitive Contract Approval Request	\$ 175.00
T170	Public Notice of Participation in a Buying Group Template	\$ 175.00

All templates

If you wish to buy the entire Procurement Procedures Manual, then we will offer 20% discount on the standard price, which is \$13,720.

2-hour complimentary session with our subject matter expert to discuss your organization's needs

Custom Quote

Procurements Procedure Manual can be sold in a bundle, in parts, and can also be customized. Please schedule a complimentary call with our subject matter expert to understand your organization's needs to generate a custom price quote.

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