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## Council Policy

Policy Name	<b>Purchasing/Procurement</b>
Issue Date	<b>May 3, 2000</b>
Revision Dates	<b>November 15, 2020</b> <b>September 2024</b>

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### Intent

As part of its ongoing commitment to operating in a transparent and fair manner with a focus on human rights, ethics, and climate stability; the Ontario Association of Architects will ensure that its procurement of services and products will be done, whenever possible, only from suppliers with a similar commitment to responsible policies and practices in these areas. Where applicable, the Ontario Association of Architects also commits to utilizing the qualifications-based selection procurement model.

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### Guidelines

#### Qualifications-Based Selection

Where applicable, the OAA will utilize a qualifications-based selection procurement model. In these instances, proposals will be clearly identified as a qualifications-based selection procurement and price will only be considered and/or negotiated with the proponent having the highest quality or technical score. In the event that a reasonable arrangement cannot be reached, the OAA will proceed to negotiate with the next highest proponent, and so on until the contract has been awarded.

#### Purchases under \$10,000

Where the value of the purchase will not exceed \$10,000, staff will have discretion to determine the appropriate procurement method but must endeavor to uphold commitments around employment and environmental practices. Unless circumstances make this prohibitive, staff should still try to solicit at least three proposals that respond to the product or service requirements.

#### Single Purchases over \$10,000

Where the value of the purchase will exceed \$10,000, staff will prepare a specification and attempt to ensure that at least three proposals are received that respond to the product or service requirements. Staff will ensure that the best quality proposal (based on pre-determined criteria) be selected.

#### Repeat Purchases over \$10,000

Where purchases will be repetitive, and the cost of each purchase will exceed \$10,000, staff will prepare a specification and attempt to ensure that at least three competitive proposals are received every three to five years.

### Blanket Purchasing over \$10,000

Where a blanket purchasing arrangement is appropriate, staff will attempt to ensure that at least three proposals are received every three to five years. Potential bidders would be advised of our purchasing policy, and invited to propose the best quality proposals based on this policy and the Association's priorities.

In certain, limited circumstances it may be more appropriate to structure *repeat* purchases of a service from a single source. For example, it may be in the OAA's benefit to return to the original printer for reprints of an OAA publication. Staff will be responsible for determining and effecting the approach which is most favourable to the OAA in such circumstances, subject to approval of the Executive Director. Wherever possible, QBS will be used when making the initial selection.

### Consulting Services

Consulting services include, for example, services of specialist consultants, legal services, expert witness services, etc.

Staff will solicit input from the President, Sr. Vice President & Treasurer or Vice President in the preparation of the Request for Proposal, the creation of the short-list of qualified candidates, and in the analysis of the proposals.

A Request for Proposal will be prepared which describes the services to be provided, including a clear definition of the scope of those services where possible, and which also sets out the content required in the proposal, and the criteria whereby the successful proponent will be determined. Wherever possible, at least three proposals will be invited from a short-list of qualified candidates.

With input from the President/Vice President, the Executive Director and staff responsible will review the proposals using a Quality Based Selection (QBS) approach, with specific criteria and weighting established appropriately to the type of services sought. Review may include interviews, where appropriate.

The assignment will be awarded to the proponent which scores highest in the QBS analysis. In some cases, this process will be used to establish a 'roster' or 'pool' of consultants, for example in the case of expert witnesses.

### Conflicts of Interest

Suppliers and prospective suppliers of goods and services, when seeking to establish or renew contracts with Ontario Association of Architects, must not try to gain improper advantage or preferential treatment for other relationships they may have with Ontario Association of Architects. Suppliers must disclose all conflicts of interest whether real, potential, or perceived.

### Employment Practices

It is the expectation that Suppliers abide by applicable employment, labour, non-discrimination, and human rights legislation. Where local laws do not prohibit discrimination or where these permit differential treatment, suppliers must be committed to non-discriminatory practices in their operations.

### Environmental Practices

It is the expectation that Suppliers abide by applicable environmental legislation. Where local laws do not have adequate environmental protections in place, suppliers should be committed to climate stability.

Failure to abide by the terms of this policy may result in the foregoing or cancellation of a contract.

### Exceptions

Exceptions to this policy, including sole sourcing, may be made by the Executive Director in consultation with the members of the Executive Committee of Council. In these instances, the decisions to deviate from the procurement policy will generally be made only where there is a compelling reason or circumstance.

Council and Staff must recognize and allow sufficient time to carry out the selection processes outlined above.

