



---

Responsible Unit	Financial Services / Procurement Services
Last Reviewed/Updated	July 2022
Approving Sector Head	Mary MacVicar
Procedure	CFI Procurement Procedure

---

## Overview

The Canada Foundation for Innovation (CFI) is an independent corporation created by the Government of Canada in 1997.

CFI's goal is to strengthen the capability of Canadian universities, colleges, research hospitals, and other not-for profit institutions to conduct world-class research and technology development. Their investment in state-of-the-art research infrastructure projects supports research excellence and helps strengthen research training across Canada.

Procurement Services oversees the acquisition of goods and services on behalf of Acadia University. For CFI projects, the role of Procurement Services is one of a consultative nature assisting the Principal Investigator (PI), the Manager, Research Grants and Programs, and members of the Financial Services team. The process is intended to support the PI with the procurement of required goods and services while ensuring that applicable University and CFI policies and procedures are followed. The process will also ensure that applicable Federal and Provincial legislation and trade agreements governing the acquisition of goods and services is adhered to.

“The CFI operates on the principle that its funds must be used effectively and economically. To maximize the purchasing power of its investment and to ensure a fair and transparent process, the CFI requires that all purchases follow the usual institutional tendering and purchasing policies and procedures.”

“A formal competitive bid process must be performed when required by institutional policies. To help reduce the administrative burden, this process should be performed only once, prior to the purchase of an item. The requirement for competitive bidding should be clearly communicated to all involved at the onset. The institution should not make any purchase commitments to suppliers when soliciting pricing information at the proposal and award finalization stages, ensuring that a formal competitive bid process can be carried

out prior to the actual purchase. For items involving in-kind contributions, the institution is also expected to follow its usual policies and procedures, which must follow the guidelines outlined in section 6.5.”

Excerpt from the *CFI Policy and program guide*, published 2019

## Procedure

The following procedure focuses on the final acquisition process and the role of Procurement Services:

### Budget Finalization and Consultation with Procurement Services

Following notification of award, the PI shall contact Procurement Services who will coordinate the appropriate process by way of a Request for Proposal (RFP) or Request for Quotation (RFQ). If a competitive process is not to be followed, an Alternate Procurement Practices Justification Form is required. Below is an outline of the process:

- a) The process cannot be initiated prior to final approval of the funding. Following final funding approval, the PI should contact Procurement Services to arrange for a meeting to discuss the project requirements.
- b) During the planning phase, the PI will be required to provide detailed specifications for the items, the CFI line item number/s corresponding with the grant application, the mandatory requirements for vendor selection, as well as an evaluation matrix that will establish the weighted criteria to be used when reviewing the proposal responses.
- c) Based on the discussion, Procurement Services will recommend the appropriate competitive process and will provide assistance with its development.
  - i. The PI will obtain quotations for below-item thresholds as per the University Procurement Policy. Requests must be made in writing to each vendor, including sufficient information to elicit a response from each vendor, such as specifications, quantity, warranty, insurance, training, delivery location, shipping, etc. Procurement Services can assist with obtaining quotes, if required.



- ii. Procurement Services will lead the competitive process for requests above tender thresholds.
- d) In accordance with the Memorandum of Understanding for the Atlantic Trade and Procurement Partnership (ATPP), Canada Free Trade Agreement (CFTA), and the University's Procurement Policy, Procurement Services will advertise the requirement as appropriate. Where thresholds warrant public notification, the University will use the Province of Nova Scotia's public tendering site.
- e) Legislation requires that vendors are given a minimum three-week period to submit a response.
- f) Receipt and evaluation of quotations: Copies of quotes are to be submitted to Procurement Services for review before the requisition is submitted in Colleague. Procurement will review the quotes with the PI. Once a vendor is selected, the PI submits a requisition in Colleague, and it is processed by Procurement Services.
- g) Receipt and evaluation of competitive solicitations above tender threshold:
  - i. Electronic submissions for competitive processes above tender thresholds are received by Procurement Services through the Bonfire tendering portal.
  - ii. Following the close of the competitive process, Procurement Services will review all proposals to ensure compliance with the mandatory requirements.
  - iii. Procurement Services will then forward compliant proposals to the PI (and other evaluators, if applicable) for review. All compliant responses must be evaluated in accordance with the criteria established in the planning stage and published in the RFP document. Evaluation of proposals will be undertaken in Bonfire. Comments and observations are summarized and scores averaged. This information is referenced in a debriefing session, upon the request of any vendors participating in the process.
  - iv. The vendor will be selected based on the highest overall score.
- h) As legislated and outlined in the University's institutional policies, a competitive process is mandatory above the thresholds outlined in Acadia University's Procurement Policy. Recognizing however that there may be rare circumstances under which a competitive process is not appropriate, sole supplier justification may be submitted by the PI for consideration. Before proceeding, review the Alternative Procurement Practices (ALTP) Procedures and complete the ALTP Justification Form.

