

# Procedure

## Invitational Procurement

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**This Procedure falls under the Procurement Administrative Policy.**

**Approved By:**

Deputy City Manager  
Financial and Corporate Services

**Date of Approval:**

04/16/2020

**Program:** Financial Management

*The City of Edmonton's resilient financial position enables both current and long-term service delivery and growth.*

**Next Scheduled Review:**

04/16/2023

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**Purpose**

The purpose of this procedure is to prescribe invitational procurement processes available to business area purchasers in lieu of a competitive procurement process for purchases between \$25,000 and \$75,000 where more than one supplier is available who meet the City's requirements, or for procurements with a value between \$75,000 up to \$500,000 for goods, services and intellectual property rights (between \$200,000 up to \$500,000 for construction), where a trade agreement exception applies and more than one supplier is available.

Invitational procurements above \$75,000 where no trade agreement exception applies must utilize the Non-competitive Procurement Procedure.

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**Definitions**

All definitions contained in the Procurement Administrative Directive apply to this procedure.

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**Processes**

**1. Conduct an Invitational Procurement**

- 1.1. The business area purchaser must determine the contract scope for the procurement.
  - 1.2. The business area purchaser must complete a sourcing request, including the completion of the Procurement and Contract Risk Assessment, which will determine whether the procurement is high-risk or low-risk.
  - 1.3. The business area purchaser must document the evaluation plan that identifies how the submissions received from invited suppliers will be evaluated to determine the preferred supplier.
  - 1.4. The business area purchaser should identify, preferably, at least three potential suppliers that may respond to the proposed invitational procurement.
  - 1.5. If the contract is high risk and non-City standard, the business area purchaser must arrange
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- for legal review of all contract documents in accordance with the Review and Execution of Agreements Directive (A1459).
- 1.6. The CPSS Buyer will prepare the sourcing event in SAP Ariba, issue the sourcing event to the invited suppliers, receive submissions, and provide the submissions that meet the mandatory requirements to the business area purchaser.
  - 1.7. The business area purchaser, in addition to any other evaluation committee members, will review all submissions and select a preferred supplier in accordance with the evaluation criteria in the invitational sourcing event. The evaluation of proposals should be conducted in accordance with the Competitive Procurement Procedure.
  - 1.8. Following award of the contract or cancellation of the sourcing event, the CPSS Buyer will notify all unsuccessful bidders and will, in consultation with the business area purchaser, provide debriefings for any interested bidders following the notification.

### 2. *Execution of the Contract*

- 2.1. If there has been negotiation on the contract in accordance with the sourcing event, and the contract is high risk and non-City standard, the business area purchaser must arrange for legal review of all contract documents in accordance with the Review and Execution of Agreements Directive (A1459).
- 2.2. The CPSS Buyer will prepare, and arrange for execution of, the contract resulting from the invitational sourcing event in accordance with the Signing Contracts Guideline.
- 2.3. After execution of the contract, the CPSS Buyer will prepare and issue a purchase order or outline agreement for the contract.

The Branch Manager, Corporate Procurement and Supply Services, will monitor the use of invitational procurements and provide reports to the relevant Deputy City Manager of any procurements that do not comply with this procedure.

### **Additional Resources**

The Branch Manager, Corporate Procurement and Supply Services may, after review by the City Solicitor, approve standards to support or provide further detail to the above processes; however, any amendments to the processes contained in this procedure must be approved by the City Manager.