

STAR



STRENGTHENING
ADMINISTRATION
OF RESEARCH

2021 Workshop Series

-
- Welcome! Thank you for joining us. The workshop will begin shortly.
 - Please check that you are on mute and your video is off.
 - This workshop will be recorded.
 - Have your case studies reference nearby

2021 Workshop Series

Research Procurement Updates

February 17, 2021, 10:30 am – 11:30 am

Nathan King

Senior Procurement Officer, Procurement Services

Land Acknowledgement

"We wish to acknowledge this land on which the University of Toronto operates. For thousands of years it has been the traditional land of the Huron-Wendat, the Seneca, and most recently, the Mississaugas of the Credit River. Today, this meeting place is still the home to many Indigenous people from across Turtle Island, and we are grateful to have the opportunity to work on this land."

Access Check

Access is a shared responsibility between everyone in this workshop.

- Is there anything (presenter screen, sound) that may affect your participation in this session?
- For any other general access issues, please use the Zoom chat to send a private chat message to *Alexandra Candib*

Agenda

- Procurement During COVID-19
- Procurement Policy Updates
- Customs Broker Updates
- Poll Questions
- Case Studies
- Question Period

Procurement During COVID-19

- The University's ability to adapt
- Provide support and ensure that Research related to COVID-19 happens as needed
- The pandemic does not negate the University or the Tri-Agency policies and processes
- Procurement Services is available to support and assist with any and all procurement related issues

Procurement Policy Updates

- Enhancements to University's Procurement Policy:
 - Procurement Thresholds
 - PCard Program
 - U of T Supplier Network
 - Guide to Financial Management



University of Toronto Procurement Policy

Procurement Method	Informal (1 Written Quote)	Invitational (2 Written quotes)	Invitational (3 Written quotes)	Open (Tender Call / RFX)
Goods	Up to \$9,999	\$10,000-\$49,999	\$50,000 - \$99,000	\$100,000
Non-consulting Services	Up to \$9,999	\$10,000-\$49,999	\$50,000 - \$99,000	\$100,000
Consulting Services	N/A	N/A	Up to \$99,999	\$100,000
Construction	Up to \$9,999	\$10,000-\$49,999	\$50,000 - \$99,000	\$100,000
Procurement Authority	Local Unit	Local Unit	Local Unit	Procurement Services

PCard Program

- PCard Spend Thresholds:
 - A single transaction does not exceed \$10,000 (excluding taxes)
 - The monthly spend limit does not exceed \$50,000 (excluding taxes)
 - Purchases must not be split to circumvent the single transaction limit
- Research Specific Requirements
 - All purchases made on the PCard must be eligible expenses based on the funding agencies guidelines and policies

Customs Broker Updates

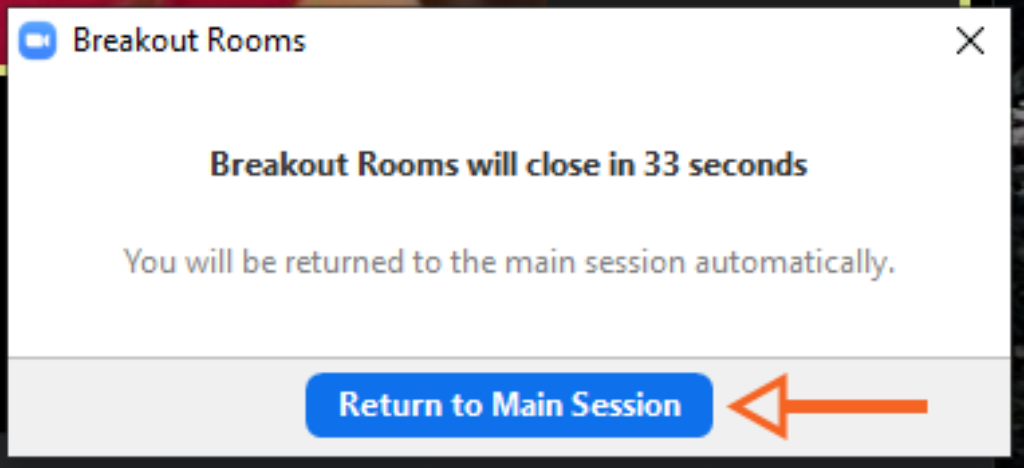
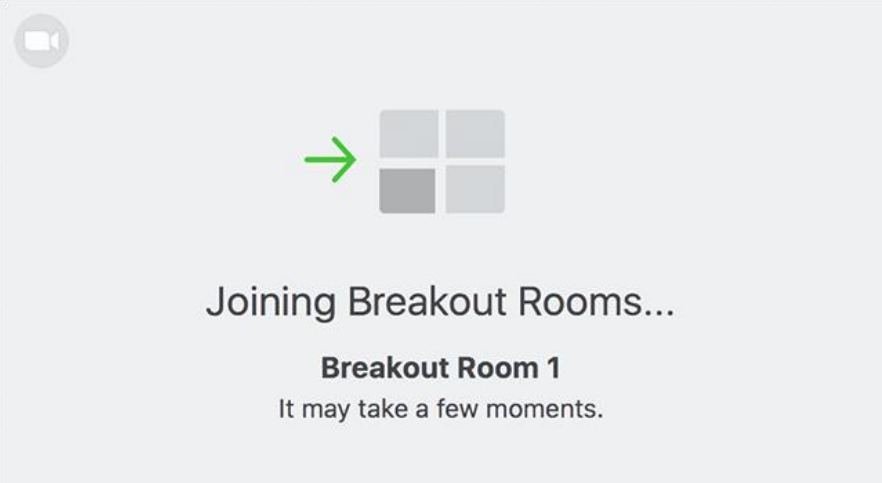
- Thompson Ahern & Co. is now the University of Toronto's Customs Broker
- Process and Pricing Updates
- Customs Department Profile (CDP) Form
- Import Goods Form

Customs Broker – Who to contact

Services	Contact
Customs Clearance (including after-hours shipments)	uoftoronto@taco.ca (905) 677-3471
Team Lead, Customs clearances	sgeorge@taco.ca (905) 677-3471 x5436
Invoice copies, charges, rates, billing	fgangoo@taco.ca (905) 678-5486
Consulting & Compliance	mkirby@taco.ca (905) 677-3471 x5490
24-Hour Processing Personnel	windsoroffice@taco.ca (519) 250-0400

Poll Questions

Breakout Rooms



Case Studies

- Meant to create discussion within your groups.
- Think about what the main considerations should be.
- What assumptions did you make? Which questions would you ask?
- After the breakout room, I'll ask that you raise your hand if you'd like to share your groups discussions.

Case Study #1

Your lab is buying a new Mass Spectrometer and all of the companies providing quotes are from abroad. Supplier A provides a better equipment based on the requirements included in the Invitation to Quote (ITQ), and you would like to proceed with their quote. Your Department has completed a Customs Department Profile Form but isn't sure if it includes the default account information. How do you proceed?

Items	Supplier A	Supplier B	Supplier C
Mass Spectrometer	\$42,000	\$40,000	\$60,000
Warranty/Service	\$10,000	Included	\$ 7,000
Delivery	\$ 5,000	\$ 6,000	\$ 3,000
Total Cost	\$57,000 CAD	\$46,000CAD	\$70,000CAD

Case Study #2

You are procuring a specialized microscope that is only sold outside of Canada. You've received the following two quotes. How do you proceed? What are the main considerations?

Items	Supplier A	Supplier B
Microscope	\$36,000	\$40,000
Software	\$2,000	\$1,000
1 year – Warranty	\$5,000	\$2,000
Delivery		\$6,000
Total Cost	\$43,000 USD	\$49,000 USD

Questions

Still Have Questions?

Contact Us:

- <https://research.utoronto.ca/contact-us>
- <https://www.procurement.utoronto.ca/about-procurement/contact-us>

Feedback, please!



2021 STAR Workshop Series: Next Events

Internal Audit: Understanding Research Expenditure Compliance Wed. March 10,
10:00-11:00am

Canada Foundation for Innovation (CFI) *(Invitation-only)*
Post-Award Management Thurs., April 8
10:30-11:30am

CFI Fair Market Value *(Invitation-only)* Tues., May 4
1:30-2:30pm

Tri-Agency Guide on Financial Administration: Part 1 Wed. May 12,
2:00-3:00pm

Tri-Agency Guide on Financial Administration: Part 2 Thurs. May 13,
10:00-11:00am

Resources

Procurement Services	https://www.procurement.utoronto.ca/
Thresholds	https://www.procurement.utoronto.ca/about-procurement/competitive-procurement#thresholds
Invitation to Quote (ITQ) SOP	https://www.procurement.utoronto.ca/tools-templates-forms/invitation-to-quote-sop
Supporting Documentation	https://www.procurement.utoronto.ca/programs-and-services/purchasing-goods-services/supporting-documentation
Customs	https://www.procurement.utoronto.ca/programs-and-services/customs
Research Procurement	https://www.procurement.utoronto.ca/programs-and-services/research-procurement

Resources

- Division of the Vice-President, Research & Innovation (VPRI) <https://research.utoronto.ca>
- STAR Program <https://research.utoronto.ca/training-resources/research-administration-training-star-program>
- 2021 STAR Quick Tips...(starting in late Spring)

Thank you for participating!