

Attachment 1: Summary of Changes to Toronto Zoo Purchasing Protocol (FIN-003)

Policy	Ref. No.	Current	Proposed	Explanation
Purpose	10.	Does not exist	This policy is intended to: 10. Facilitate alternative approaches to procurement, where appropriate, to support equity and innovation goals.	The Purpose statement outlines the intent of the Toronto Zoo Purchasing Protocol. The proposed change is to recognize that enabling Strategic Plan objectives such as collaborating with indigenous and community partners, building a culture of innovation, and establishing the Zoo as a demonstration zone for emerging technologies may require alternative procurement approaches.
Definitions		Chief or Senior Financial Officer	Senior Financial Officer	Removing reference to Chief Financial Officer
Legislative Authority		The Municipal Act (2001) Part VI, Section 271, as amended states that a local board shall adopt policies with respect to its procurement of goods and services, including policies with respect to: 1. Types of procurement processes that shall be used:	The <i>City of Toronto Act, 2006</i> , S.O. 2006, Ch. 11, Sch. A, at Section 212, provides that a local board (restricted definition), which includes the Toronto Zoo, shall adopt and maintain policies with respect to its procurement of goods and services.	Updated reference to the City of Toronto Act in place of the Municipal Act.

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		2. Goals to be achieved by using each type of procurement process. 3. Circumstances under which each type of procurement process shall be used. 4. Circumstances under which a tendering process is not required. 5. Circumstances under which in-house bids will be encouraged as part of the tendering process. 6. How the integrity of each procurement process will be maintained. 7. How the interests of the municipality or local board, as the case may be, the public and persons participating in a		

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		procurement will be protected. 8. How and when the procurements will be reviewed to evaluate their effectiveness; and 9. Any other prescribed matter.		
Trade Agreements		• Canadian Free Trade Agreement (CFTA) • Canadian /European Union Comprehensive Economic and Trade Agreement (CETA) • Ontario-Quebec Trade and Cooperation Agreement The above agreements are developed for internal trade within Canada and among provinces with the main objectives being to eliminate inter-provincial trade barriers	Relevant trade agreements: • Canadian Free Trade Agreement (CFTA) • Canadian /European Union Comprehensive Economic and Trade Agreement (CETA) • Ontario-Quebec Trade and Cooperation Agreement	Update to applicable trade agreements, including removal of outdated references.

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		and to improve the competitiveness of Canadian companies by removing preferential treatment based on location or other local considerations. Under these agreements, our Zoo is required to provide open access to our procurement requirements above minimum threshold of \$100,000 per tender.		
Accessibility for Ontarians with Disabilities Act (AODA)		This legislation places a legal obligation on the Zoo to provide accessibility for Ontarians with disabilities with respect to goods, services, facilities, accommodation, employment, building, structures, and premises on or before January 1, 2014.	This legislation places a legal obligation on the Zoo to provide accessibility for Ontarians with disabilities with respect to goods, services, facilities, accommodation, employment, building, structures, and premises.	Removes reference to a definitive date as the obligation to provide accessibility is ongoing.

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Environmental Purchasing		Staff must consider the “cradle to grave” impact of the product or service prior to making the purchasing decision.	Staff must consider the “full life cycle” impact of the product or service prior to making the purchasing decision.	Updated terminology.
Social Procurement	New	Does not exist	The Toronto Zoo encourages bidding by suppliers owned and/or operated by persons from equity-deserving communities including Indigenous-led, People of Colour, 2SLGBTQ+, women, etc. In accordance with policy FIN-008, when available, at least one diverse supplier is to be included in all invitational solicitations between \$7,500 and \$133,800. Solicitations with an anticipated value over \$5 million (including option years) shall include workforce development opportunities.	Introducing new language regarding the Toronto Zoo’s Social Procurement policy establishing minimum requirements for soliciting of bids from diverse suppliers and in the provision of workforce development commitments.
Forced Labour and Child Labour	New	Does not exist.	The Toronto Zoo is committed to ensuring that its supply chains do not involve the use of forced labour or child labour. All	Adding explicit language to the Purchasing Protocol stating the Toronto Zoo’s commitment to ensuring that suppliers and business partners do not use forced

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			suppliers to the Toronto Zoo will be required to provide an attestation signed by the head of the organization that their products or services have not been produced through or used supply chains involving forced labour or child labour.	labour or child labour within their supply chains.
Non-competitive (Goods/Services Purchase \$350-\$5,000; Projects, Consulting, Facilities, Equipment & Construction Purchase \$350-\$7,500)		The Division/Cost Centre shall request one (1) written price quotations for purchase requisitions of \$350 - \$7,500 or less in value, where possible by email, facsimile or other similar method, before a purchase order is issued for purchases relating to Projects, Consulting or Construction. For all other purchases of general goods and services, this threshold is lowered to \$5,000.	The Division/Cost Centre shall request one (1) written price quotations for purchase requisitions of \$350 - \$7,500 or less in value, where possible by email, facsimile or other similar method, before a purchase order is issued for purchases relating to Projects, Consulting or Construction.	Establishes a common threshold of \$7,500 for all non-competitive purchases requiring one written quotation.

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Informal Quotations (Goods/Services Purchases \$5,000-\$10,000; Project Consulting & Construction Purchases \$7,500-\$20,000)		The Supervisor, Purchasing & Supply shall obtain at least three (3) written price quotations for general goods and services over \$5,000 but less than \$10,000, by written invitation to qualified bidders. For projects, consulting, or construction over \$7,500 but less than \$20,000, at least (3) price quotations shall be obtained by written invitation to qualified bidders.	Deleted.	Standardizes the threshold for three invitation quotations for the simplicity of staff and vendors.
Request for Quotations (RFQ) (Goods/Services Purchases \$10,000-\$25,000; Project Consulting & Construction Purchases		The Supervisor, Purchasing & Supply shall request bids for general goods and services over \$10,000 but less than \$25,000, by written invitation to qualified suppliers. For projects, consulting, or construction over \$20,000 but less than \$50,000, bids shall be	The Supervisor, Purchasing & Supply shall request bids for all purchases over \$7,500 up to \$133,800, by written invitation to a minimum of three (3) qualified suppliers.	Establishes common threshold for a invitation quotations conducted by the Supervisor, Purchasing & Supply. The maximum threshold has been raised to \$133,800 aligning with the City of Toronto threshold and in accordance with applicable trade agreements.

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		requested by written invitation to qualified suppliers.		
Request for Tender (RFT)- (Goods/Services Over \$25,000; Project, Consulting & Construction Over \$50,000)		Purchases for general goods and services over \$25,000 or projects, consulting, or construction over \$50,000 will be offered for public tender, which may necessitate notification or advertising in a national recognized newspaper for the required goods or services.	Purchases over \$133,800 will be offered for public tender, which may necessitate notification or advertising in a national recognized newspaper, media site, or industry association site for the required goods or services.	Standardizes the threshold for conducting open and competitive tender processes above \$133,800 in alignment with City of Toronto threshold and in accordance with applicable trade agreements. Updates advertising channels to reflect current industry norms.
Exemptions/ Exclusions from Competitive Bid Process	New	Does not exist	Contribution Agreements between the Toronto Zoo and other specific parties are subject to the Zoo's Policy FIN-009 instead of the Purchasing Protocol (FIN-003).	Establishes that in addition to the listed exemptions and exclusions from competitive bids, the Zoo may enter into contribution agreements that support the testing of new technologies and partnering with Indigenous and other community partners in accordance with the criteria established in Policy FIN-009.