

WWF PROCUREMENT POLICY AND PROCEDURES
FOR GOODS AND SERVICES
FOR NON-U.S GOVERNMENT-FUNDED SOURCES

(subject to the requirements of the primary donor**)

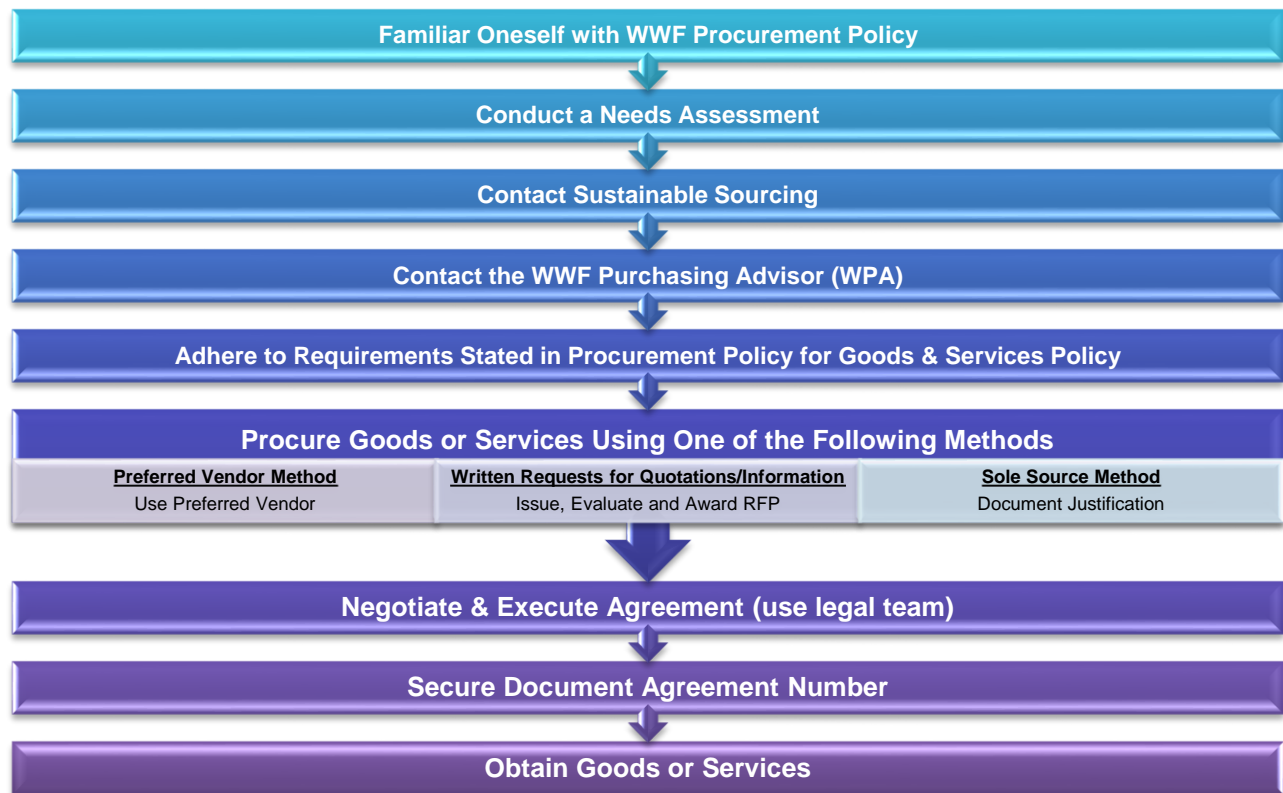
World Wildlife Fund, Inc. (WWF) has established a procurement policy to ensure the most efficient use of limited resources when obtaining the goods and services necessary for the operation of the organization and the implementation of its conservation activities.

Where any portion of the procurement will be funded, fully or partially, by a U.S. Government source, see USG WWF Procurement Policy Supplement, https://worldwildlifefund.sharepoint.com/sites/GovtFunding/_layouts/15/questaccess.aspx?questaccesstoken=GkkyTW68WUpsVd4ZAGpj4JckD78YpDclCnS0tIFJEQA%3d&docid=2_0db2f1481e8e2477fafd7a0c70897e5d6&rev=1.

Process

WWF employees must adhere to the WWF Procurement Policy to ensure that the procurement of goods and services are conducted in an honest, competitive, fair and transparent manner which delivers the best value for money outcome, at the same time protecting the reputation of WWF, taking into account the required specification, quality, service, delivery, reliability, environmental and social issues and the total cost of ownership.

WWF has designated WWF Purchasing Advisors (WPA) who serves as the primary contact for specific goods or services. A WPA designation indicates that the employee is responsible for providing appropriate guidance for all procurement that fall under his/her procurement expertise. All procurements must be reviewed by the designated WPA who will guide the purchaser through the procurement process. For assistance procuring goods or services not listed on the WPA list, Sustainable Sourcing, in the Facilities & Administration Department must be consulted. The WWF Sustainable Sourcing Specialist has experience in procurement, including specification development, request for proposal process, bid document preparation, bid analysis, negotiation, legal requirements, advanced level contract management and administration skills.

WWF PROCUREMENT PROCESS

For all purchases, first check the Sustainable Sourcing Specialist, who will then direct you to the appropriate WWF Purchasing Advisor list which is located on the Purchasing intranet site at <https://worldwildlifefund.sharepoint.com/Facilities/Pages/Purchasing-at-WWF.aspx>. The WWF Purchasing Advisor serves as the primary contact for specific purchases for the organization.

Each WWF Purchasing Advisor is responsible to maintain a current list of Preferred Vendors and, if applicable, copies of their agreements. A Preferred Vendor is a vendor who has been selected by (or with the guidance of) the Sustainable Sourcing Specialist or relevant WWF Purchasing Advisor and has a current agreement in place with WWF. *Generally a Preferred Vendor, is a vendor who has a relationship within good standing and has been used within the past 18 – 24 months by the WPA providing you with guidance.*

Contact the Facilities & Administration Department for assistance for any categories not found on the Purchasing Advisor lists. In these cases, documentation would be maintained by the purchaser (example: if a vehicle was purchased for a field office, the F&A Manager would be responsible for maintaining the vehicle contract, warranties, etc.).

When establishing a preferred vendor relationship, the required documentation on file includes and is not limited to the following: detail of technical requirements, written RFP (if necessary for the appropriate price thresholds), written vendor responses, documented quotations from vendors, and detailed cost/price analysis to justify vendor selection. Records must also include verification that costs are reasonable, and as applicable, allocable to the project and allowable in accordance with Donor provisions. For audit purposes, all original documentation should be kept by the purchaser, and copies of the documentation kept with the WWF Purchasing Advisor if there is a WPA for the particular commodity or service.

All agreements must be reviewed by the GCO prior to being signed, with limited exceptions described here <https://intranet.wwfus.org/gc/ReviewingAgreements.htm>. Once an agreement has been reviewed, approved by GCO and signed by both parties an agreement number must be obtained from the Accounting Department.

GENERAL REQUIREMENTS FOR ALL PROCUREMENT

- [EQUIPMENT & SUPPLIES](#)
- [VENDORS CONTRACTS](#)
- [INDEPENDENT CONTRACTOR AND CONSULTANT AGREEMENTS](#)

A. Planning: All staff members are responsible for verifying that adequate funds are available in the operational or project budget to make the planned purchase, taking into account quantity, shipping costs, and parts required. Program and field staff must also take into account whether maintenance services will be available and to determine what internal program approvals or donor approvals must be obtained **prior** to purchase.

B. Unnecessary or duplicate items: Proposed purchases must respond to the operational or technical needs of the purchasing program, department or field office. Purchases should not be made when an item is already available through existing WWF inventory. Where appropriate, an analysis should be made of lease and purchase alternatives to determine which would be most economical and practical.

C. Commitment to Sustainable Purchasing: In keeping with the Commitment to Conservation in the Office policy, WWF considers energy efficiency, recycled content, and recyclability in addition to price and quality. Additionally, WWF considers life cycle costs as well as the carbon footprint of the goods including shipping. WWF looks to companies who do or are able to provide environmentally preferable products (EPP) are products and/or services, in addition to sharing materials to be presented during the RFP process. WWF will define EPP as those products and/or services that have a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose. Such products or services may include, but are not limited to, those which contain documented recycled content, minimize waste, conserve energy or water, and reduce the amount of toxics disposed or consumed.

D. Buyer Guidance: Seek guidance from the respective WWF Purchasing Advisors in their respective areas of expertise; Strategic Agreement Services for donor requirements; the General Counsel's Office and/or Chief Financial Officer when required; others as may be helpful.

E. Competitiveness: To the maximum extent possible, WWF conducts its vendor and goods purchasing through open and free competition. WWF is committed to seeking out the supplier/contractor who responds to the specific need with a competitive price and best overall quality, with a commitment to sustainable purchasing practices.

F. Contract Administration Process: The respective staff member is responsible for ensuring that all services are delivered or all equipment is received in good condition, and that systems are in place to confirm that the vendor has adhered to the terms and conditions of the contract.

G. Required Documentation on File: Thorough records of each step of the purchase are recommended, from the planning to the shipping. This includes Primary Donor and/or WWF Purchasing Advisor approval for the procurement, as required and applicable; cost/price analysis; all quotations received; and justification for vendor selection.

H. Requests for Quotations (RFQs) and Requests for Proposals (RFPs): When appropriate, Requests for Quotations or Requests for Proposals for goods and services provide for all of the following:

- A clear and accurate description of the technical requirements for the material, product or service to be procured in competitive procurement. Such a description shall not contain features which unduly restrict competition.
- Requirements which the bidder must fulfill and all other factors to be used in evaluating quotations or Proposals.
- A description, whenever practicable, of technical requirements in terms of functions to be performed or performance required, including the range of acceptable characteristics or minimum acceptable standards.
- The specific features of brand name or equal descriptions that bidders are required to meet when such items are included in the Requests for Quotations.
- The acceptance, to the extent practicable and economically feasible, of products and services dimensioned in the metric system of measurement
- Preference, to the extent practicable and economically feasible, for products and services that conserve natural resources and protect the environment and are energy efficient.

I. Guidelines for Obtaining the Best Price. The following guidelines shall be used:

- Collect several quotes or quotations in writing when possible (reference procurement guidelines).
- For goods, seek guidance from the appropriate WWF Purchasing Advisors when possible.
- For goods, ask if a supplier/contractor will offer discounts for prompt payment and/or longer term commitment;
- For goods, consider the cost of a maintenance agreement and warranty.
- If the price of the preferred supplier/contractor is too high, try to negotiate it down. WWF Purchasing Advisors and/or the Facilities department can assist if needed.
- Before closing the deal, check references of the supplier/contractor; check the environmental record and/or the environmental friendliness of the supplier/contractor.
- Document the cost/price analysis used for determining the best rate, or to justify why a sole source was used.

J. Cost and Price Analysis: Some form of cost or price analysis shall be made and documented in the procurement files in connection with every procurement action. Price analysis is accomplished through comparison of price quotations submitted, market prices and similar indicators, and application of discounts, etc. Cost analysis is the review and evaluation of each element of cost to determine each is reasonable, and, as applicable, allocable to the project and allowable in accordance with Donor provisions.

K. Testing Goods: Examine and test goods when you receive them; ensure that the vendor has met all terms and conditions of the purchase agreement. If you have experienced problems with a particular vendor, alert the WWF Purchasing Advisor as appropriate.

L. Shipment of Goods and Insurance: When possible, have the supplier ship directly to the destination. When shipping goods to another location, adequate insurance must be obtained for actual replacement value plus shipping costs. Bills of lading and other appropriate documentation should be sent to the WWF staff or designated recipient in the field for receipt of the goods through customs. For shipment of goods purchased with government funds, coordinate with Strategic Agreement Services to ensure that all shipping requirements of the donor agency have been met. For more information visit <https://worldwildlifefund.sharepoint.com/General-Counsel/Pages/Economic-Sanctions-Export-Controls-and-Counter-terrorism-Laws.aspx> if you have questions about exports, contact the General Counsel's office.

M. Inventory. Each office maintains an up-to-date inventory of equipment and supplies. Inventory records must be maintained on all property, furniture and equipment which has a single item cost of over \$300

N. Conflict of Interest: WWF maintains a standard of conduct for its staff in order to prevent actions which may be deemed as a conflict of interest when purchasing goods and services with any funding source. Click here to view the Conflict of Interest Policy: <https://worldwildlifefund.sharepoint.com/Pages/Conflict-of-Interest.aspx> (See Additional Requirements for USG Funding for specific information regarding USG-funded procurement).

O. U.S. Patriot Act: Anti-Terrorism Clause: WWF cannot in any manner knowingly provide support to terrorist organizations or individuals. All grantees and consultants must be checked on the OFAC and UNSC lists. Please work with Agreement Services for review of the process and consult the General Counsel's Office as questions arise

| <u>EQUIPMENT & SUPPLIES</u> | | | |
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| <u>REQUIREMENTS</u> | <u>Under \$5,000</u> | <u>\$5,000 to \$149,999</u> | <u>\$150,000 and over</u> |
| <p>WWF Preferred Vendor approved by the WWF Purchasing Advisor</p> <p><i>Note: Sole source justification is not required when using a WWF Preferred Vendor.</i></p> | Use WWF Preferred Vendor approved by the WWF Purchasing Advisor. | Use WWF Preferred Vendor approved by the WWF Purchasing Advisor. | Use WWF Preferred Vendor approved by the WWF Purchasing Advisor. |
| <p>Written Requests for Quotations (when not using WWF Preferred Vendor)</p> <p><i>Note: The purchaser should consult with the Sustainable Sourcing Specialist, then the WWF Purchasing Advisor for guidance on written quotations. A bid should be used when not using a WWF Preferred Vendor.</i></p> | Documented quotations from one or more vendors recommended. | <p>(1) Documented quotations from two or more vendors required.</p> <p>(2) Quotations from WWF Preferred Vendors are recommended as part of the competitive bidding process.</p> | <p>(1) Documented formal Requests for Proposals (RFP) are required from at least three vendors.</p> <p>(2) RFP responses from WWF Preferred Vendors are recommended as part of the competitive bidding process.</p> |
| <p>Sole source vendor selection</p> | Allowed without prior approval, as long as WWF Purchasing Advisor has been consulted first (if one exists). | <p>(1) Allowed only with prior approval of Program Director, SVP, or Field Office Representative as long as WWF Purchasing Advisor has been consulted first (if one exists).</p> <p>(2) Files must contain written justification for the use of non-competitive process.</p> | <p>(1) Allowed only with prior approval of SVP, Program Operations (for Program) or CFO (for Non-Program), as long as WWF Purchasing Advisor has been consulted first (if one exists).</p> <p>(2) Files must contain written justification for the use of non-competitive process.</p> |

| VENDORS (BUSINESSES / COMPANIES) | | | |
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| REQUIREMENTS | <u>\$25,000 or less</u> | <u>\$25,001 to \$149,999</u> | <u>\$150,000 and over</u> |
| <p>WWF Preferred Vendor approved by the WWF Purchasing Advisor</p> <p><i>Note: Sole source justification is not required when using a WWF Preferred Vendor.</i></p> | Use WWF Preferred Vendor approved by the WWF Purchasing Advisor. | Use WWF Preferred Vendor approved by the WWF Purchasing Advisor. | Use WWF Preferred Vendor approved by the WWF Purchasing Advisor. |
| <p>Written Requests for Quotations (when not using WWF Preferred Vendor)</p> <p><i>Note: The purchaser should consult with the Sustainable Sourcing Specialist, then the WWF Purchasing Advisor for guidance on written quotations. A bid should be used when not using a WWF Preferred Vendor.</i></p> | Documented quotations from two or more vendors recommended. | <p>(1) Documented quotations from two or more vendors required.</p> <p>(2) Quotations from WWF Preferred Vendors are recommended as part of the competitive bidding process.</p> | <p>(1) Documented formal Requests for Proposals are required from at least three vendors for a competitive bidding process when WWF Preferred Vendors are not applicable to meet the procurement needs.</p> |
| <p>Sole source vendor selection</p> | Allowed without prior approval, as long as WWF Purchasing Advisor has been consulted first (if one exists). | <p>(1) Allowed only with prior approval of Program Director, SVP, or Field Office Representative as long as WWF Purchasing Advisor has been consulted first (if one exists).</p> <p>(2) Files must contain written justification for the use of non-competitive process.</p> | <p>(1) Allowed only with prior approval of SVP, Program Operations (for Program) or CFO (for Non-Program), as long as WWF Purchasing Advisor has been consulted first (if one exists).</p> <p>(2) Files must contain written justification for the use of non-competitive process.</p> |

| INDEPENDENT CONTRACTORS AND CONSULTANTS (INDIVIDUALS) | | | |
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| dollar amounts are for fees only | | | |
| REQUIREMENTS | <u>\$25,000 or less</u> | <u>\$25,001 to \$149,999</u> | <u>\$150,000 and over</u> |
| Written Requests for Quotations | Contact with two or more consultants recommended, subject to the requirements of the Primary Donor if restricted funds. | Documented contacts from two or more consultants required. | Formal Request for Quotations required. Written quotations from at least three consultants will be obtained as part of the competitive bidding process. |
| Sole source consultant selection | Written justification for the use of non-competitive process recommended. | Allowed with written justification. Rationale for selection will also be documented. | Allowed only with prior approval of SVP, Program Operations (for Program) or CFO (for Non-Program). Files must contain written justification for the use of non-competitive process. |
| Required documentation on file | <ul style="list-style-type: none"> (1) Records must include detail of technical requirements. (2) Individual consultants' Curriculum Vitae (CVs) must be on file. (3) Cost/price comparison among two or more consultants recommended. (4) Written justification for the use of non-competitive process recommended. (5) Include copies of quotations. | <ul style="list-style-type: none"> (1) Records must include detail of technical requirements, documented quotations from two or more consultants (unless sole source), cost/price analysis, and rationale for consultant selection. (2) Individual consultants' Curriculum Vitae (CV's) must be on file. (3) Files will contain written justification for the use of non-competitive process. (4) Include copies of quotations. | <ul style="list-style-type: none"> (1) Records must include detail of technical requirements, written Request for Proposals (RFP) documented RFP responses from 3 or more consultants, and detailed cost/ price analysis and other documentation to justify vendor selection (unless sole source). (2) Individual consultants' Curriculum Vitae (CV's) must be on file. (3) Files will contain written justification for the use of non-competitive process. (4) Include copies of quotations. |

REQUIREMENTS FOR CONSULTANTS

See WWF's Consultant Issuance Policies and Procedures (CIPP)

https://worldwildlifefund.sharepoint.com/ProgramOps/_layouts/15/WopiFrame.aspx?sourcedoc={5EA6D601-A5F5-4F9D-943E-4F54A38EA21A}&file=CIPP-Feb%202014.docx&action=default