

Updated **Schedule E - Exclusions**

1. Excluded purchases, acquisitions and expenditures:

(a) This policy does not apply to the acquisition of the following Deliverables:

- i. services provided by licensed lawyers, notaries or forensic auditors;
- ii. services of expert witnesses or factual witnesses used in court or legal proceedings, including tribunal matters;
- iii. financial services including banking, merchant fees, brokerage, debt issuance, and investments;
- iv. insurance premiums and services, including insurance adjusters, and replacement purchases made as a result of an insurance claim;
- v. goods intended for resale to the public;
- vi. goods purchased on a commodity market;
- vii. works of art;
- viii. subscriptions to newspapers, magazines, or other periodicals.
- ix. goods, services or construction where 100 percent of the total cost is funded by a third party;
- x. advertising for Town services or programs;
- xi. public relations, media, social media monitoring, trade show registration, booth rentals, and event sponsorship;
- xii. Procurements for By-election services;

(b) This policy does not apply to Contracts or agreements relating to hiring of employees or employee compensation, or memberships or dues, or reimbursement of employee expenses, or employee training, including conferences, courses, and seminars.

(c) This policy does not apply to goods or services procured from a government entity or non-profit organization. Note: This exclusion does not apply to procurements

that are covered by the Canada-European Union Comprehensive Economic and Trade Agreement (the “CETA”).

(d) This policy does not apply when the Procurement is for a Contract to be awarded to the winner of a design contest, and the contest was organized in a fair and transparent manner and was advertised by publicly posted notice and participants were judged by an independent jury.

(e) This policy does not apply when the Procurement is being conducted on behalf of an entity that is not covered by the Procurement Policy.

(f) This policy does not apply to payment of the Town’s general expenses, such as:

- i. Taxes including Harmonized Sales Tax (HST), remittance of property taxes and development charges to school boards and York Region
- ii. Debt repayment and sinking fund contributions
- iii. Costs related to employee training, development and recruitment in accordance with Town policies
- iv. Grants to agencies in accordance with Town policies
- v. Postage and courier services
- vi. Utility charges for consumption and acquisition of water, sewer, electricity, natural gas
- vii. Utility relocation and construction costs relating to a capital project
- viii. Town sponsored employee purchase programs
- ix. Employment agencies for temporary employment contracts
- x. Appraisal fees
- xi. Arbitrator, mediator and other similar professionals
- xii. Suppliers and entertainers for special events and programs