

PURCHASING PROCEDURES

Background

The District has a responsibility to establish purchasing procedures that will result in quality purchases of goods and services within the financial constraints of the District.

Purchasing procedures will be established and implemented that maximize value for the dollars spent.

Guidelines

1. As a public institution, the District will purchase competitively, without prejudice, and will seek maximum educational value for the funds expended.
2. The District will attempt to obtain the maximum value for each dollar expended consistent with good educational and purchasing practices. Consideration should be given to the supplier's reputation and experience, the ability to deliver or perform within the time specified, and the ability to provide after-sales maintenance and service. Past experience on previous orders will also be considered.
3. All other factors being equal, the District's procedure is to purchase from local, provincial and Canadian suppliers, before seeking other options.
4. To the extent that it is reasonable, efficient and consistent with school-based management philosophy, the District supports the concept of centralized purchasing to service the needs of the various schools in the District.
5. All items purchased through the Secretary-Treasurer, or directly by individuals in the name of the school or District, will become the property of the District.
6. All purchases must fall within the limitations of the annual budget, as approved by the Board of Trustees, and must be consistent with the educational goals and programs as outlined in the Three Year Educational Plan. Purchases outside of budget limitations must be specifically approved by the Board of Trustees.

Procedures

1. The Secretary-Treasurer is responsible for establishing and maintaining purchasing procedures subject to the following:
 - 1.1 The Principal or designate is responsible for approving purchase orders at the school level in accordance with school-based management philosophy and the approved budget.

- 1.2 The Operations and Maintenance Manager or designate is responsible for approving purchase orders for the maintenance department in accordance with school-based management philosophy and the approved budget.
- 1.3 Copies of approved purchase orders are forwarded to the District office.
- 1.4 The Principal or designate is responsible for approving invoices received and forwarding them to the District office for payment.
- 1.5 The Operations and Maintenance Manager or designate is responsible for approving invoices received and forwarding them to the District office for payment.
- 1.6 A copy of the purchase order must be attached to the invoice when the order is complete.
- 1.7 When appropriate, the purchase order may be generated at District office so that it may be tendered.

2. General Considerations: Tenders and Quotes

- 2.1 The lowest bid consistent with the specifications will normally be accepted. However, a tender other than the lowest may be accepted if the reasons in support of such action are deemed by the Secretary-Treasurer to be in the best interests of the District. The District reserves the right to reject or accept any tenders, compliant or not, including the right to reject all tenders.
- 2.2 A record of the tenders or quotations on each article or service for which prices are called shall be retained for a period of one year.
- 2.3 The name of the successful bidder on each tender call shall be made available on request.
- 2.4 For construction and maintenance work, upon receipt of a requisition and supporting tender information, a purchase order authorizing the work shall be issued.

3. Obtaining Prices: Educational and Administrative Purposes

- 3.1 Estimated Value under \$10,000:
 - Two or more verbal quotations shall be obtained where possible and practical.
- 3.2 Estimated Value \$10,000 to \$74,999:
 - No fewer than three written quotations shall be obtained ~~where possible~~.
- 3.3 Estimated Value Over \$75,000:
 - Formal public tenders shall be invited from suppliers appropriate to the commodity required (pursuant to the Agreement on Internal Trade and Alberta Regulation 383/88).

4. Obtaining Prices: Construction and Maintenance Work

- 4.1 Estimated Value Under \$10,000:

- Two or more verbal quotations shall be obtained where possible and practical.
- 4.2 Estimated Value \$10,000 to \$74,999
- At least three written quotations shall be obtained.
- 4.3 Estimated Value Over \$75,000:
- Formal public tenders shall be invited from suppliers appropriate to the commodity required (pursuant to the Agreement on Internal Trade and Alberta Regulation 383/88).
- 4.4 Estimated Value Over \$200,000:
- Board approval is required by formal motion.
 - Formal public tenders shall be invited from suppliers appropriate to the commodity required (pursuant to the Agreement on Internal Trade and Alberta Regulation 383/88).
- As Outlined in the School Capital Manual:
- For projects with construction value over \$200,000, School jurisdictions are required to comply with applicable provisions of provincial agreements such as the Agreement on Internal Trade (AIT) and the New West Partnership Trade Agreement (NWPTA) respecting procurement of goods and services necessary to complete an infrastructure project. GOA-funded projects will be subject to compliance with the *School Buildings and Tendering Regulation*. Any school building construction contract valued over \$200,000 must be approved by Infrastructure's Contracts Review Committee (CRC) prior to award.
 - For projects with construction value of less than \$500,000, school jurisdictions with sufficient capacity may complete construction with own forces. Any sub-contracts over \$200,000 must be submitted to Infrastructure for CRC approval.
 - Project delivery by construction management for projects over \$200,000 requires Infrastructure approval of the scheme prior to the jurisdiction proceeding with obtaining tenders or quotations from builders and suppliers.
- 4.5 For immediate emergency repairs necessitated through fire, water, sewage, wind, or electrical damage, the supervisor of operations and maintenance and Secretary-Treasurer shall take whatever action is necessary to restore operations. The Board shall be advised of any emergency action taken resulting in an expenditure in excess of \$100,000.

5. Purchasing Insurance

The Secretary-Treasurer shall be responsible for maintaining adequate insurance coverage.

6. Legal and Other Professional Services

Such professional services as are required shall be obtained as directed by the Superintendent.

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