

PURCHASING

Background

Purchases are to be made with consideration of best value which includes all aspects such as cost, quality, supply, servicing, maintenance, local availability and environmental impact.

When the value of a purchase is such that the tendering process is administratively justifiable, tenders will be awarded on a competitive basis with consideration to all of the above aspects.

Procedures

To ensure as far as possible that the best value is obtained for dollars expended, all personnel who are delegated some responsibility for purchasing will observe the procedures provided below.

1. General Guidelines

- 1.1. Definitions of varying methods of procurement described below, and the decision to use any particular form will depend on the complexity of the requirement, the monetary value, and the urgency.

Purchasing Decision Matrix						
	Authorization Means	Determination of Supplier		Purchase Order	Process type	Approver
	Requisition	Quote	Tender			
< \$2500	Y	N	N	N	District Purchasing Card	Local
< \$5000	Y	Verbal	N	Y	Purchase order->invoice	Local
< \$10,000	Y	Written	N	Y	Purchase order->invoice	Director of Finance
< \$25,000	Y	N/A	Non advertised	Y	Non advertised tender process	Secretary Treasurer
> \$25,000	Y	N/A	Public	Y	Public tender process	Secretary Treasurer

2. Use of Purchase Orders

- 2.1. All supplies, services, and equipment being purchased over two thousand five hundred dollars (\$2500) must be covered by a Purchase Order initiated by a Principal or District Supervisor. Individual staff members are not to place orders other than by this method. This requisition is in a form that becomes a purchase order when signed by the Secretary-Treasurer or designate. The only exceptions to this requirement are as follows:

- 2.1.1. Purchases may be made through school trust accounts for home economics and industrial education consumable supplies, with reimbursement claimed by submission of a Form [Trust Account Voucher \(Form 511-1\)](#) with receipts attached.
- 2.1.2. Gases and fuel refills.
- 2.1.3. Supplier payment acceptance methods that have been pre-determined and fall outside of the scope of this administrative procedure due to updated technological advances. Secretary-Treasurer or designate authorization is required in advance.

3. Exceptional Circumstances

- 3.1. The Secretary-Treasurer or designate may authorize the immediate purchase of any item or service without recourse to the provisions of this Administrative Procedure where:
 - 3.1.1. Staff, student or public safety is in question;
 - 3.1.2. Purchase will prevent damage to District facilities, fleet and equipment;
 - 3.1.3. Essential services will be restored or maintained;
 - 3.1.4. Essential physical plant services will be restored; or
 - 3.1.5. Supply chain delays resulting from emergent events or exceptional circumstances outside of the District's control require immediate purchases in order to maintain essential supplies and services.

4. Determination of Suppliers

4.1. Corporate Credit Card/Purchasing Card Program

- 4.1.1. The Corporate Credit Card/Purchasing Card Program is not intended to avoid or bypass purchasing procedures as outlined in this Administrative Procedure. Instead, it is intended to provide flexibility and autonomy to the user while complementing current existing purchasing procedures and payment guidelines. Unlike personal charge cards, the P-Card Program incorporates controls over certain types of expenditures. These controls ensure that the P-Card can only be used with specific types of merchants and within specific dollar limits.
- 4.1.2. The Corporate Credit Card/Purchasing Card Program is intended to allow cardholders to more effectively conduct their duties, however, not all employees will be issued a personal corporate credit card. If employees have pre-approval of a Principal, Director, or Manager to facilitate a purchase through the use of the department or school location general corporate credit card and the card is currently unavailable, purchases can be reimbursed through the use of [Memo for Employee Reimbursement – Expense Claim Form \(Form 515\)](#). It is expected that this will occur at a minimum as departments and school locations have general corporate credit cards available for employee use. Memo for Employee Reimbursement forms must be authorized by the Principal, Director, or Manager that authorized the pre-approval and must be submitted to Accounts Payable personnel for reimbursement

4.2. Quotations Process

- 4.2.1. Request for quotes can take the following forms:

- 4.2.1.1. Written quotations from three or more sources in response to a written request. Responses may be submitted by fax, email or in person;
 - 4.2.1.2. Verbal quotations given by two or more supplier representatives, usually by telephone. Such quotations are to be recorded by the requester and retained with the purchase order.
 - 4.2.2. Quotations must be obtained for the following:
 - 4.2.2.1. Individual items costing over two thousand five hundred dollars (\$2500.00).
 - 4.2.3. All things being equal quality and suitability preference shall be given to local firms, then BC and then Canada. Local and provincial firms which have previously supplied the District will continue to be given the opportunity to provide quotations on items similar to those which they normally supply.
 - 4.2.4. Quotations must be solicited from a minimum of three (3) suppliers, except when less than three (3) are known. If assistance is required with the names of potential suppliers, contact the Director of Operations, Director of IT, Food Service Coordinator or Learning Resources Centre Personnel as appropriate.
 - 4.2.5. Copies of quotations received must be kept with the purchase documentation for later verification.
 - 4.2.6. The requisition must include the date of the quote and other pertinent details, such as whether or not delivery cost is included in the price. Incomplete requisitions will not be approved.
 - 4.2.7. If quotations are obtained from less than three suppliers, or if purchase from other than the low bidder is recommended, a memorandum of explanation must be kept with the purchase documentation.
- 4.3. Petty Cash Administration
- The use of Petty Cash will be as follows:
- 4.3.1. Petty cash will not be used without prior approval of the principal.
 - 4.3.2. Petty cash will be reimbursed only if submitted with thirty (30) days of the purchase.
 - 4.3.3. To reduce the administrative burden created by the use of petty cash, principals will set and monitor the limit of purchase using petty cash.
 - 4.3.4. There will be no administration conducted by accounts staff to obtain tax rebates on petty cash purchases.
 - 4.3.5. Principals and Supervisors are to submit a [Memo for Employee Reimbursement – Expense Claim Form \(Form 515\)](#) as required for replenishment.

4.4 Accounts Payable Process

4.4.1 Original invoices, statements and supporting documentation shall be forwarded to the appropriate supervisor for approval, consistent with the District's Authorized Signature form by school location, department or program. Supporting documentation for purchases made must be forwarded to Accounts Payable personnel in a timely fashion for immediate payment. When a purchase to be reimbursed is made in a foreign currency, supporting documentation shall include the exchange rate charged by the financial institution.

4.5 Tender Process

4.5.1 Tenders are offers made by firms which have been invited to submit tenders, in sealed envelopes, for goods or services; these tenders are received before a closing date and time specified in the "Invitation to Tender" document. The formality of this procedure ensures that the tender of a supplier is not disclosed to competitors before the closing date specified in the "Invitation to Tender".

5. Receiving of Tenders

- 5.1. Sealed tenders, clearly marked with the tender number or title, will be received by the Director of Operations up to 3:00 p.m. local time, DAY of Week, Date, YEAR. The method of delivery to accomplish this is the responsibility of the bidder. Tenders received after the closing time will be returned unopened. Faxed tenders will not be accepted.
- 5.2. Tenders will be opened publicly immediately following the tender closing.
- 5.3. Bidders wishing to obtain competitors' bid information must attend the tender opening. Bidders not attending the opening can request information through the Freedom of Information and Protection of Privacy legislation.

6. Submission of Tenders

- 6.1. Tenders must be submitted in the requested format.
- 6.2. Other information requested to be submitted, or submitted by the bidder as additional information, such as product printed matter, samples etc are not required to be enclosed in the envelope with the tender form. The Tender Form must be affixed to the other material being submitted as a single package.
- 6.3. All tenders submitted become the property of the District and as such, are subject to the Freedom of Information and Protection of Privacy legislation. To request documentation confidentiality, bidders must submit a covering letter, with their tender detailing the specifics of their request.

7. Withdrawal of Tenders

- 7.1. Tenders may be withdrawn personally, by written notice or by fax provided such notice of withdrawal is received by the Director of Operations prior to the tender closing time.

8. Revisions of Tenders

- 8.1. A tender already delivered to the District may only be revised in the following manner and the revision must be plainly referable to a particular tender. Revisions to tenders already received must be submitted only by fax or signed letter. The revision must state only the amount of which a figure is to be increased or decreased or specific directions as to the exclusion or inclusion of particular words.
- 8.2. Please note in the case of faxed revisions to tender, the District assumes no responsibilities and the bidder assumes all risks of using faxed communications for revisions. The faxed transmission must be received by the office of the Director of Operations prior to closing time.
- 8.3. Alterations, qualifications or omission to the Tender Form may be cause for rejection.
- 8.4. Failure to complete the tender document may result in rejection of tenders submitted.

9. Awarding of Tender

- 9.1. This tender will be irrevocable for a period of sixty (60) days from tender closing time. The lowest or any tender will not necessarily be accepted.
- 9.2. The completed tender document, terms, conditions, instructions, specifications and any attachments shall become part of any contract entered into between the successful bidder and the District.
- 9.3. The right is reserved to reject any or all tenders and to waive any minor informalities or irregularities in tenders received.
- 9.4. This tender, if awarded, may be in whole or in part and the District, reserves the right to award this tender to multiple bidders. In the event of funding difficulties, some areas or schools may be eliminated in order to meet budget constraints.
- 9.5. Criteria for award or rejection of this tender may include but not be limited to the following: price stated, total cost implication, product quality, references, past performance and the demonstrated ability and personnel to fulfill the requirements of the tender.

10. Insurance Clauses

- 10.1. The successful bidder must provide proof of the required insurance within five (5) business day of notice of award prior to proceeding with the work.

11. Contract Approval

- 11.1 The Secretary Treasurer shall approve all District contracts and agreements related to this procedure.

12. Prohibitions

- 12.1 The following activities are prohibited, unless specifically approved by the Secretary Treasurer:

- 12.1.1. The splitting of purchases to avoid the requirements of this policy by any method, including corporate credit cards.

- 12.1.2. A purchase by an employee of any goods or services for personal use, whereby the employee utilizes District purchasing methods, vendor account information, or pricing structures for personal gain, as per the [Employee Conflict of Interest AP 404](#).

- 12.1.3. Any purchase whereby an employee benefits from or is reasonably perceived by the public to have benefitted from, a District transaction over which the employee can influence decisions.

- 12.1.4. The use of cash or purchase of gift cards to keep on hand is not a permitted purchasing method.

- 12.1.5. Garage sale purchases are not permitted, as well, accessing marketplace type online websites for purchases is not permitted. Examples of online websites could include but is not limited to Craigslist, Facebook, EBay, and other used/second-hand websites.

Reference: Sections 22, 23, 65, 85 School Act
Income Tax Act
New West Partnership Trade Agreement

Adopted: March 1, 2011

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