



PURCHASING

APPROVED: 1982.06.15
REVISED: 1988.11.22
1999.01.26
2004.10.26
2009.05.26

POLICY

Assets, materials and services needed for the operations of the school district shall be procured in the most economical and expeditious manner possible, at a cost that represents best value, while maintaining relationships with suppliers on a fair and ethical basis. Procedures for the acquisition of goods and services are the responsibility of the Secretary-Treasurer.

DEFINITIONS:

“Tender” is a formal request from the district to solicit prices for goods or services from suppliers on a prescribed form conforming to the district’s conditions of purchase. Tenders are issued when the product or service specifications are fully defined and the purchase value is in excess of \$25,000. Tenders are initiated by advertising through newspapers and school district bulletin boards and/or invitation from the district’s list of bidders.

“Quotation” is a statement of price, terms of sale and description of goods or services offered by a vendor to the school district. The request from the school district may be formal (on a prescribed form) or informal (via telephone, etc.).

“Proposal” is a request from vendors in situations where the district knows what the requirement is but does not have complete specification. The vendor is invited to submit ideas complete with prices and terms of sale on his solution to fill the requirement.

Responsibility Centre: Secretary-Treasurer
References: *School Act*, Sections 74 and 85

PURCHASING

PREAMBLE

There is a need to delineate procedures for the procurement of goods, materials and services for the school district and its schools.

Approved: 1999.01.26



PURCHASING**REGULATIONS:**1. General Regulations

- 1.1 The Secretary-Treasurer is responsible for the purchasing and distribution function throughout School District No. 57. These functions may be delegated, but the Secretary-Treasurer shall be responsible for ensuring that policies and procedures are followed.
- 1.2 Purchases made in the name of the school district that do not conform to this policy may be considered to be an obligation of the person making the purchase and not an obligation of the Board. The Board's purchasing power and procedures may not be used for personal use or benefit.
- 1.3 The purchase of materials and services shall be based on total best value, which is determined by weighing all or some of the following factors:
 - 1.3.1 Acquisition cost, including transportation.
 - 1.3.2 Operating cost.
 - 1.3.3 Availability of parts, service, training and technical expertise from the vendor.
 - 1.3.4 How well the product does the job for which it was intended.
 - 1.3.5 Durability and reliability of the product.
 - 1.3.6 Cost of supportive inventory.
 - 1.3.7 Expedient delivery.
 - 1.3.8 Warranty.
- 1.4 Vendors or products that have an unsatisfactory record of performance or service may be disqualified from the contract award of tenders at the discretion of the Secretary-Treasurer
- 1.5 Purchases shall not be made from an employee of the Board where the transaction is related to the employee's work responsibilities.
- 1.6 The lowest or any tender will not necessarily be accepted.

Specific Regulations1.7 Method of Acquisition

- 1.7.1 Where the total value of a purchase exceeds \$25,000, the method of purchase shall be either a tender or a request for proposal.



PURCHASING

- 1.7.2 Where the total value of the purchase exceeds \$1,000 but is less than \$25,000 the purchasing department shall attempt to obtain a minimum of three (3) quotations.
 - 1.7.3 Where the total value of a purchase is less than \$1,000, the Secretary-Treasurer is responsible for ensuring that purchases are made at competitive prices.
 - 1.7.4 Notwithstanding the above, where a particular unit is specified and where it is definitely known that there are no alternative resources (sole source), the unit may be purchased by direct negotiation with the supplier.
- 1.8 Approval
- 1.8.1 The Secretary-Treasurer is authorized to accept a bid or proposal other than the lowest whenever best value considerations indicate a higher bid to be in the best interest of the school district.
 - 1.8.2 The Secretary-Treasurer may refer to the Board acceptance of tenders or proposals involving unusual or controversial issues.
- 1.9 Reporting
- 1.9.1 The Secretary-Treasurer shall prepare a quarterly report on purchases over \$25,000.
- 1.10 Availability of Tender Results
- 1.10.1 All tenders shall be opened in public.
 - 1.10.2 All persons entering a bid are entitled to attend the tender opening.
- 1.11 Emergencies
- 1.11.1 To meet an emergency, the Superintendent of Schools may authorize the immediate purchase of any item without recourse to the provisions of this policy or regulations, but such purchases shall be reported to the Board at the next regular Board meeting.

Approved: 1982.06.15
 Revised: 1988.11.22, 2004.10.26, 2009.05.26

