

PURCHASING

Background

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

The Division has a responsibility to establish purchasing procedures that will obtain maximum value for every purchase, to purchase competitively, and to consistently use responsible purchasing practices.

Procedures

1. As a public institution, the Division encourages all interested suppliers to quote on the requirements of the Division.
2. The Division will attempt to obtain the maximum value for each dollar expended consistent with good educational and purchasing practices. Consideration will be given to the supplier's reputation, experience, the ability to deliver or perform within the time specified, and the ability to provide after-sales maintenance, warranties and service or other criteria deemed to be relevant to the purchase. Past experience on previous orders will also be considered.
3. All other factors being equal, the Division's policy is to purchase from local, provincial and Canadian suppliers in that order of preference.
4. To the extent that it is reasonable, efficient and consistent with school-based management philosophy, the Division supports the concept of centralized purchasing to service the needs of the various schools in the Division.
5. All items purchased through the Secretary-Treasurer, or directly by individuals in the name of the school or the Division, will become the property of the Division.
6. No person shall canvas, sell or offer to sell goods, services or merchandise to a teacher or a student in a school without the prior consent of the principal.
7. The Secretary-Treasurer is responsible for establishing and maintaining purchasing procedures subject to the following:
 - 7.1 Purchase orders are required for all aggregated purchases of \$2,000 at the school level and \$5000 at central office, and over, and must be approved before commitment is made to a vendor for purchase. See AP 515 Appendix A – For Schools and AP 515 Appendix B – For Central Office.
 - 7.2 Purchase orders are required as per AP 515 Appendix A and B even if some items are backordered or the order will be split between invoices by the vendor.
 - 7.3 The Principal is responsible for approving purchases at the school level in accordance with school-based management philosophy and the approved budget as per AP 515 Appendix A and B.

- 7.4 The Director of Facilities is responsible for approving purchase orders for the maintenance and custodial departments in accordance with school-based management philosophy and the approved budget.
- 7.5 Purchased orders initiated in hardcopy are to be entered into the accounting software for tracking purposes.
- 7.6 The Principal is responsible for reviewing and approving invoices or reimbursements received electronically and forwarding them to the Division office for payment.
 - 7.6.1 Individual purchases or reimbursements from vendors, in which STAR Catholic School Division has an established business account, are not eligible for approval or reimbursement. (ie. purchases from Amazon must be made through the division's business account and not through a personal account or credit card).
- 7.7 Each invoice for goods over \$200 must have an acknowledgement by a second individual who is an employee of the division but not the purchaser. The acknowledgement must indicate "Received", delivery date, signature, and printed name of the second individual.
- 7.8 Invoices entered into the accounting software, where an PO is required, are to be matched to the PO within the accounting software.
- 7.9 When appropriate, the purchase order may be generated at Division office so that it may be tendered.
- 7.10 Invoices may be evaluated for order disaggregation: splitting an order into multiple orders. Intentional disaggregation will be viewed as a violation of this administrative procedure.

8 General Considerations: Tenders and Quotes

- 8.1 There will be a full and open competition among vendors. The Secretary-Treasurer will facilitate the obtaining of quotations and purchases.
- 8.2 In accordance with the agreement on internal trade (AIT) all purchases of goods greater than 100,000 dollars and construction in excess of 250,000 dollars must go to public tender through an electronic bidding system for municipal, academic school and hospital sectors. For all purchases, see AP 515 Appendix A for Schools and AP 515 Appendix B – For Central Office for procurement requirements.
- 8.3 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 Division.
- 8.4 Full and open competition among vendors will be waived only in special circumstances, such as:
 - 8.4.1 Equipment, supplies, materials, or services are urgently required to continue essential service;
 - 8.4.2 A product or vendor is of a proprietary nature and obtainable from only one source; and

- 8.4.3 The purchase price has an aggregate value of less than \$5000, except for building repairs, for which the limit shall be increased to \$10,000.
- 8.5 For immediate emergency repairs necessitated through fire, water, sewage, wind or electrical damage, the principal and Secretary-Treasurer shall take whatever action is necessary to restore operations. The Board shall be advised when any emergency action is necessary to restore operations. The Board shall be advised of any emergency action taken resulting in expenditure in excess of the operating budget.
- 8.6 A record of the tenders or quotations on each article or service for which prices are called shall be retained and submitted with the invoice for payment to Financial Services.
- 8.7 The name of the successful bidder and the price on each tender call shall be made available on request.
- 8.8 For construction and maintenance work, upon receipt of a requisition and supporting tender information, a purchase order authorizing the work shall be issued.

Reference: Section 33,52,53,68,85,188,196,197,204,222,225,229 Education Act
Freedom of Information and Protection of Privacy Act
Agreement on Internal Trade; Annex 502.4