



Policy 4040
PURCHASING AND TENDERING

Adopted: 1997-06-24	Reviewed:	Amended:2004-03-23 2013-01-15 2019-02-05
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SUBJECT: **PURCHASING & TENDERING**

The Board of Education has a responsibility to ensure that all goods and services purchased for the District represent the best value for money, with respect to price and quality. The Board ensures appropriate business procedures are in place to control all purchasing and that all procedures are able to withstand public scrutiny.

The Board of Education delegates purchasing for School District No. 78 (Fraser-Cascade) to the Superintendent of Schools and/or the Secretary-Treasurer with final approval for single item purchases exceeding \$30,000 resting with the Superintendent.

School Principals, the Director of Facilities and Transportation and the Transportation Supervisor have the authority to purchase single items not to exceed \$30,000.

The Board of Education, as part of the normal annual budget approval process provides each school and department with an annual budget. It is the responsibility of each school Principal, Maintenance Supervisor or the Transportation Supervisor not to exceed the total budget without approval of the Secretary-Treasurer.

The Board will, openly and fairly, tender any item or service valued over \$30,000 using a solicitation method appropriate to the value of the goods or services being acquired.



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REGULATIONS

SUBJECT: **PURCHASING**

1. General Purchasing

- a) Purchasing and use of purchase orders is authorized only to procure goods and services for the School District.
- b) Purchases up to \$ 30,000 are at the discretion of the Superintendent of Schools, the Secretary-Treasurer, the Principal, the Maintenance Supervisor or the Transportation Supervisor (for items purchased from budgets allocated to the school or department).
- c) For purchases between \$ 30,000 and \$ 75,000, written quotes are required from not less than three (3) sources, unless the market is more limited. These purchases must be by purchase order and signed in advance by the budget authority and the Secretary-Treasurer.

All purchases of goods and services of \$75,000 or more and construction projects of \$250,000 or more must be by public process such as offered by www.bcbid.gov.bc.ca. This process alerts potential bidders of contract opportunities and invites their bids through Invitation to Tender.

To adhere to the Agreement on Internal Trade (AIT) the Board of Education must ensure Board-managed projects remain within the \$250,000 threshold. The value of a project should be accurately established by strictly defining the scope of the work and developing a firm cost estimate.

- d) Purchasing for any item must be in accordance with a purchasing procedure, approved by the Board and attached to form part of this policy.
- e) All other factors being equal, the Board's policy is to purchase from local, Provincial, and Canadian suppliers, in that order of preference.
- f) A list of Subcontractors will be provided to the Board through the Operations and Facilities Committee for work completed as part of the Annual Facility Grant.

Purchasing Procedures

The Board of Education supports the concept that decisions and actions be made at the school level. Therefore the responsibility and control of the school (department) budget should be delegated to the school Principal, Maintenance Supervisor or Transportation Supervisor. In order to facilitate this philosophy, purchases will be made in the following manner:

1. Purchase orders will be prepared at the school (department).
2. The purchase order will be approved at the school (department) by the Principal, Vice-Principal, Maintenance Supervisor or Transportation Supervisor.
3. The school (department) sends the purchase order to the supplier, with a copy to the District Office.
4. The invoice is sent directly to the District Office where payment is made following confirmation by the school (department) that the goods have been received.
5. School (department) budgets are monitored by the school (department). Budget and expenditures are available to schools through the school access program on a daily basis.
6. The school (department) will have the final decision on where to charge costs to the appropriate school (department) budget provided these decisions are made within the rules as set out by the B.C. School District Financial and Accounting Manual.
7. The District Office will monitor the overall school budget (the bottom line). Individual account budgets within the school (department) will be the responsibility of the school Principals, Maintenance Supervisor, or Transportation Supervisor.
8. Expenditures for Capital Budgets and Special Purpose Funds can only be spent for the purpose intended by the Ministry or the Board of Education. Capital and Special Purpose Funds must be within the funds allocated.
9. School surpluses and deficits may be carried forward to the following year.
10. No special purchasing arrangements that personally benefit an employee or agent of the Board are permitted.



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REGULATIONS

SUBJECT: **TENDERING**

1. General Procedures

- a) Invitations for tender will be required on all purchases or services that cost over \$ 75,000.
- b) Tenders for purchases or services under \$ 75,000 are at the discretion of the Board.
- c) Invitations for tenders will generally be advertised. Requests for quotations may or may not be advertised depending on the nature of the service or good being requested.
- d) The "Requests for Proposal" tender method may be used for a limited tender (example Auditing Services).
- e) All tenders must be opened in public on the day of tender closing. The results of the tender are public information.
- f) All tenders shall contain the clause "The Board reserves the right to reject the lowest or any tender".
- g) For a tender to be considered, it must be received at the Board Office on or before the time and date of closing. Late tenders will not be considered except in unusual circumstances when a majority of the Board may elect to consider a tender that was received late.
- h) All tenders are to be opened by a committee of at least two (2). The committee shall include the Secretary-Treasurer or his/her delegate. At the time the tenders are opened the names of bidders and bid amounts shall be recorded.