

# AP 640 Purchasing

## Policy #640 Purchasing



### RATIONALE:

To ensure that quality supplies, services, and equipment are procured for the District at the best value (cost, delivery, quality, and service), and that the purchasing process is timely, consistent, efficient, and accountable.

### PROCEDURE:

#### 1. Conflict of interest

Issues which might be seen as a conflict of interest are to be avoided (unless special permission is sought from the secretary-treasurer). Such issues include, but are not limited to:

- 1.1. Employees purchasing used equipment items from the district without the school or department first going through a disposal process.
- 1.2. Employees having a vested interest in who receives an award or are involved in making decisions on Requests for Proposals (RFP).

#### 2. Standardization

- 2.1. District standards have an economic benefit to the district. The standard is to be established by the district office, and the maintenance department is responsible for the maintenance of the equipment. Schools requesting non-standard equipment will be responsible for the repair and maintenance of this equipment from school funds.

Wherever possible, equipment and supplies shall be standardized in order to achieve maximum purchasing economy and quality. Consideration shall be given to future maintenance of equipment and availability of parts and service.

#### 3. General Guidelines

- 3.1. All purchases in excess of \$2,500 must be approved in advance by the Secretary-Treasurer or designate.
- 3.2. Purchases over \$2,500 must be documented on a Purchase Order (PO).
- 3.3. Purchases requiring installation or other facility costs will not be approved without prior consultation.
- 3.4. Technology purchases are only through the Tech Department
- 3.5. Petty cash may be used to purchase miscellaneous supply items of low dollar value.
- 3.6. Purchasing Cards may be used for urgent or emergent purchases up to \$2,500 without prior approval from the ST.
- 3.7. All purchases will be tracked through regular monthly auditing.
- 3.8. The authority to approve a quote, purchase order, work order, in the name of the school, or school district shall be delegated to the following:

- 3.8.1 School – Principal

- 3.8.2 Technology – Director or Designate
  - 3.8.3 Maintenance – Manager or Designate
  - 3.8.4 Secretary Treasurer
  - 3.8.5 Superintendent or Designate
  - 3.9 All school purchases need to be completed by May 15th of the current school year.
    - 3.9.1 Special Purpose Funds may be accessed up to June 30th with budget managers' approval.
  - 3.10 Budget managers are responsible for ensuring that good value is obtained, and budget provisions are met
  - 3.11 Arrangements must be made by the individual initiating the purchase to ensure delivery.
  - 3.12 Unless circumstances dictate otherwise, priority will be given to local business firms within School District No. 27, British Columbia, or Canada, in that order.
  - 3.13 Use of the School District purchasing procedures to acquire goods and services for personal use is not permitted.
  - 3.14 District staff may initiate reallocation of resources from school to school according to educational need and extent of use after first discussing with appropriate school administrators. Assets and equipment are the property of the District and are not to be sold between schools.
4. Product specifications
- Product specifications shall be determined by:
- 4.1 Suitability
  - 4.2 Quality
  - 4.3 Availability of parts and service
  - 4.4 Economy
  - 4.5 Delivery time
- Products such as desks, chairs and other furniture must be approved by maintenance from an approved vendor list.
5. Cooperative Purchases
- Cooperative purchasing will be undertaken with other schools, districts and other government bodies for purchasing of items in common where prices are better, quality control is better and there is a savings of administrative time or where the extra administrative time is warranted because of the overall savings.
6. Bulk Purchases
- Orders for common items will be consolidated into one school district order whenever possible. The

responsibility with regard to the bulk ordering will vary depending on the type of purchase

7. Quotations/Requests for Proposals (RFP) – Purchases less than \$75,000

- 7.1. Bidders shall be given equal consideration and the assurance of unbiased judgment in determining whether their product meets specifications and the needs of the school district.
- 7.2. Purchasers are expected to ensure that competition for the school districts' business is maximized and, in particular, that local vendors are given every reasonable opportunity to bid on School District contracts.
- 7.3. Purchases shall be made in writing and the lowest quoted price consistent with the required quality and service level. The school district shall reserve the right to accept or reject the whole or part of any RFP.
- 7.4. Where, in the opinion of the Secretary-Treasurer it is to the advantage of the school district, the lowest RFP may not be accepted.
- 7.5. Copies of quotations or RFPs in excess of \$5,000 shall be maintained by the Secretary-Treasurer's office.
- 7.6. At least three written quotes (where appropriate) are to be obtained for all purchases or leases of goods and services when an individual item's cost is estimated to exceed \$5,000.
- 7.7. At least three written quotes (where appropriate) are to be obtained for purchases or leases of goods and services when numerous items can be combined and obtained from one supplier and the cost is estimated to exceed \$5,000.