

Administrative Procedure 515

PURCHASING/LEASING

Background

The District, as a major public institution, encourages all interested suppliers to quote on the requirements of the District. Furthermore, the District will provide fair access to qualified suppliers and ensure probity in the acquisition of the supply or service.

The District attempts to obtain the maximum value for each dollar expended consistent with good educational purchasing practices. Consideration shall be given to suppliers who have:

- reputation and experience;
- the ability to deliver or perform within the time specified;
- the ability to provide after sales maintenance and service; and
- past experience on previous orders with the District.

Where price, quality and service are equal, the District shall give preference to local, provincial and Canadian suppliers respectively.

Purchases of items for personal use of employees shall not be made in the name of the District. The District may authorize employee purchase plans where employees purchase educational products (i.e. computers).

All items purchased by the District in accordance with this Administrative Procedure will become the property of the District.

Procedures

1. Authorization

- 1.1. Principals and managers with signing authority on budgets are authorized to sign purchase orders up to \$10,000.00 within the respective annual budget allocation.
- 1.2. Purchases greater than \$10,000.00 but less than \$100,000.00, requires the additional authorization of the Secretary Treasurer.
- 1.3. Purchases equal to or greater than \$100,000.00, and/or any service or maintenance agreement that is for a period of more than 12 months, unless included specifically in the approved operating or capital budget, requires the additional authorization of the Board.

2. Purchase Procedures

The following procedure will apply for authorized purchasing:

- 2.1. Purchase orders represent the contractual obligation between the District and the supplier. The purchase order protects the District and the supplier to the agreed quantity, price, description and delivery arrangements.
- 2.2. To check existing inventories in our area and other schools prior to buying new.
- 2.3. To verify whether the item can be repaired at a reasonable cost.
- 2.4. To encourage price comparisons for all purchasing.
- 2.5. A purchase estimated to exceed \$1,000.00 must receive price quotations from three (3) suppliers unless there are fewer than three (3) suppliers for the goods or services.
- 2.6. A purchase estimated to exceed \$10,000.00 based on invited or advertised written price quotations from three (3) suppliers. Tenders shall be placed in one or more of the following media:
 - 2.6.1. local newspapers;
 - 2.6.2. regional newspapers;
 - 2.6.3. provincial newspapers;
 - 2.6.4. trade journals; and
 - 2.6.5. BC Bids website

The Secretary Treasurer will determine, in accordance with this Administrative Procedure, if it is reasonable to call for written quotations. The District participates in [Focused Education Resources](#) program; this is the primary initial source for recommendations.

- 2.7 The Principal or manager responsible for the purchasing decision must ensure that suppliers located within the District boundaries are asked to bid on the supplies and/or materials to be purchased.

3. Receipt of Tenders/Quotations

- 3.1. Sealed tenders are to be received and not opened until the date and time specified on the tender.
- 3.2. All tender envelopes shall be stamped or hand-written, showing the date and the time of receipt.
- 3.3. Tender documents are then to be delivered directly to the Manager of Operations.
- 3.4. Tenders received are to be secured in the vault or safe or other secure area until the closing date.
 - 3.4.1. Any revisions or communication by bidders, via email, telephone or facsimile, are to be handled as per the above process.
- 3.5. Any variance or irregularities contrary to the above procedure shall be communicated directly and immediately to the Secretary Treasurer.

4. Use of District Forms

Purchasing must be initiated by the use of the following District forms:

- 4.1. Purchase Order - placing an order for goods or services;

- 4.2. Cheque Requisition or Electronic Funds Transfer - use for telephone invoices, subscriptions, utility bills, service contracts, registrations, postage, reimbursement for purchase of goods or services;
- 4.3. Petty Cash - miscellaneous office items such as stamps, postage, office supplies;
- 4.4. Travel Request and Claim Form - travel advance and final travel expense claim; and
- 4.5. Mileage Claim - claim for mileage between school and other related business travel, e.g. workshops.

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

Approved: November 2, 2004
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