

School District No. 22 (Vernon)

PROCEDURE

Please file in By-Laws, Policy & Procedure Manual

No. PR 2.8.0

Adopted: 14 July 1981
Amended: 14 Jan. 2003

PURCHASING PROCEDURES

All purchases made by the District including all purchases made by schools, departments or District staff on behalf of the School District are covered by these procedures. For clarification, this includes purchases made from all fund sources whether they are government funds, donations, or school raised funds or any other fund source.

School Purchase Limits

Schools may authorize minor purchases of up to \$1000 per transaction either on their own purchase order or through the use of a District Purchasing Card subject to limitations with respect to electrical, electronic or computer equipment, furniture, used equipment, and software.

For specialized purchases only, School Principals may authorize school staff to undertake a competitive bidding process for purchases over \$1000 but less than \$5000. District bidding guidelines must be followed. At least three competitive written quotations must be received (facsimile is acceptable), and a requisition with the attached bids must be sent to the Purchasing Department for review and subsequent issuing of a purchase order.

It is the responsibility of the Principal to ensure that good value is obtained.

Schools wishing to take advantage of competitive pricing may submit requisitions to the Purchasing Department for purchases of any value, but must submit requisitions for all purchases over \$1000.

Operations Departments

Operations Departments (Maintenance, Custodial, and Busing) may authorize minor purchases of up to \$1000 per transaction or in the case of specialized equipment with a single supplier, purchases of up to \$2000 per transaction either on their own purchase order or through the use of a District Purchasing Card.

For specialized purchases over \$2,000 but less than \$10,000, operations supervisors can authorize staff to undertake a competitive bidding process. At least three competitive written quotations must be received, and a requisition with the attached bids must be sent to the Purchasing Department for review and subsequent issuing of a purchase order.

Operations departments wishing to take advantage of competitive pricing may submit requisitions to the Purchasing Department for purchases of any value, but must submit requisitions for all purchases over \$2000.

Electrical, Electronic and Computer Equipment

Electrical, electronic and computer equipment regardless of value should be purchased through the Purchasing Department to ensure that CSA standards, repair and maintenance considerations and District standardization policies are met.

Furniture

Furniture should be purchased through the Purchasing Department in order to ensure that the purchase is consistent with the CUPE collective agreement.

Used Equipment

Where the purchase of used equipment is advantageous, the purchase should be handled through normal purchasing procedures. If the used equipment is subject to repair and maintenance by the maintenance department, the equipment should be examined by maintenance, to obtain an opinion on the advisability of the purchase. An independent third party appraisal of the equipment must be obtained and submitted with the requisition.

Software

In order to ensure that District standardization policies are met and that the best price is obtained, operating system software, network software, security software and virus protection software should all be purchased through the Purchasing Department. The District also has licenses for standard software applications, and the Purchasing Department should be consulted before acquiring program software.

Purchase of Equipment from the United States

Due to potential problems with CSA approval, warranties, duty and brokerage, all supplies and equipment should be purchased from Canadian suppliers unless a required item is not available in Canada.

Tenders and Quotes

The primary function of the Purchasing Department is to assist Schools and Departments in obtaining the goods and services they require at the best value for their money. This includes obtaining competitive pricing as well as evaluating the quality of the goods and services.

Competitive bidding should be obtained for all purchases where the benefits of obtaining the bids outweigh the costs of doing so. It is at the discretion of the Purchasing Department in consultation with the School Principal or Department head to decide when it is beneficial to obtain competitive bidding, and what is the most appropriate method.

1. The Purchasing Department is authorized to obtain quotations on an informal basis by telephone where the value of items is less than \$5000, or where the time factor does not allow for written requests. A facsimile confirmation should be requested from suppliers.
2. Where the value is less than \$25,000 competitive pricing may be obtained by means of a formal quotation. (responses may be received by facsimile).
3. Where the value is over \$25,000 tendering with sealed bids is the most appropriate method of obtaining competitive pricing.
4. Tenders over \$100,000 must be publicly tendered, and advertised on the B.C. Bid network or other media as appropriate.

Suppliers' Relations

In all procurement activities, School District Staff shall:

1. Meet the legal and ethical requirements for competitive bidding.
2. Keep competition open and fair in determining whether the supplier's product meets specifications and the educational needs of the District.
3. Make suppliers aware of the competitive requirements of the District purchase policy, and avoid the appearance of making a commitment to purchase where competitive pricing is to be obtained.
4. In all cases refuse any personal gift or advantage of any kind
5. Refrain from soliciting funds or materials from vendors where there is any possibility of any connection (perceived or real) to a purchase.
6. Respect the confidences of all suppliers whenever possible with the understanding that the School District is subject to the Freedom of Information and Protection of Privacy legislation.
7. Represent the School District to suppliers in a courteous and professional manner.

Purchases on Behalf of Staff

The employee computer plan through the District Office is the only time that

purchases are to be made on behalf of staff. In addition, items purchased for the School District are not to be sold to staff except in special circumstances such as the clearance of obsolete items.

Purchases from Staff

Schools and Departments should not purchase supplies or services from staff. While in most circumstances supplies or services are offered with the best of intentions, issues of conflict of interest (or perceptions of conflict of interest) and issues of supplier access make such purchases inadvisable. The only acceptable exception would be a purchase from staff who own a legitimate business (ie. The School District is only one of many customers) and they have taken part in a competitive quote or tender process.

Sale of Obsolete Assets

Equity in school and other equipment belongs to the School District as a whole. Surplus or aged equipment shall be turned in to the Maintenance or Purchasing Departments for reassignment or disposal. However, in upgrading to similar equipment a School or Department may trade in the old equipment to receive a discount on the new equipment.

Small items, or those which are difficult to sell, will be sold at the discretion of the Maintenance or Purchasing Departments to anyone enquiring. All other items will be sold by means of public advertisement for closed bids or by public auction. PST and GST must be charged in addition to the sales price. Funds are to be paid to the Board Office Receptionist and credited to the Sale of Assets Account. Funds do not go back to the School or Department from which the goods came.