



SCHOOL DISTRICT NO. 64

PROCEDURE 6200 Purchasing and Tendering

*"Inspire learners, Integrate sustainability,
Involve community"*

Section: Finances and Facilities

Dates of Revisions: October 30, 1980

Date of Adoption and

Resolution Number: June 13, 2018- 76/18

General Purchasing

1. All acquisitions of goods, services, and construction from School District funds or School District administered funds (ie School Generated Funds) are subject to these procedures except where indicated otherwise.
2. Purchasing and use of school district purchase orders is authorized only to procure goods, services and construction for the benefit of the School District.
3. Purchasing activities for the benefit of independent schools, individuals or other outside agencies would require prior authorization from the Board.
4. Purchases up to \$15,000 are at the discretion and authorization of the Superintendent of Schools, the Secretary-Treasurer, district directors, and Principals/Vice-Principals, for their respective budget line responsibilities. When practical, it is the recommendation of the Board that quotes be obtained from multiple suppliers (recorded oral quotes are acceptable) so as to obtain maximum value for each dollar expended consistent with good public purchasing practices.
5. For purchases between \$15,000 and \$75,000 written quotes are required from not fewer than two (2) sources, unless the market is more limited.
6. All purchases greater than \$15,000, but less than \$200,000, and/or contracts/leases for service/maintenance agreements that are for periods greater than 12 months require the additional authorization of the Secretary-Treasurer or his/her designate.
7. Purchases equal to or greater than \$200,000 require the additional authorization of the Board of Education.
8. Purchasing activities must be in accordance with the BC Government Public Sector purchasing requirements. School District No. 64 is governed by the provisions of the Agreement on Internal Trade (AIT) Annex 502.4 and the British Columbia - Alberta Trades, Investment and Labour Mobility Agreement (TILMA). Accordingly, procurements subject to AIT and TILMA must be posted on BC BID to ensure compliance with the legislation.

9. Minimum procurement levels subject to AIT and TILMA are as follows:
 - a. Procurement of goods: AIT - \$ 100,000 and TILMA - \$ 75,000
 - b. Procurement of services: AIT- \$100,000 and TILMA- \$75,000
 - c. Procurement of construction: AIT- \$250,000 and TILMA- \$200,000
10. All other factors being equal and in compliance with AIT and/or TILMA, the Board's procedure is to purchase from local, Provincial, and Canadian suppliers, in that order of preference.
11. The school district will not normally enter into purchasing contracts with students, teachers, staff, board members or members of their immediate families. To avoid a possible conflict of interest, all people who have financial or other interest in a supplier company, either directly or indirectly through members of his their immediate families, should report such financial or other interests in writing to the Secretary-Treasurer who will determine whether the interest is sufficient to disqualify the vendor.
12. School district employees must not accept gifts or samples, either in kind or in money or in excessive entertainment, from a vendor or a potential vendor which has a value greater than \$100. Gifts or samples include any items offered to an employee or his/her family which have intrinsic value or are not obviously in the form of advertising. Excessive entertainment includes, but is not necessarily restricted to, transportation of other than a business nature and overnight accommodation.
13. The School District will, whenever practical, join in co-operative purchasing with other School Districts or agencies to take advantage of lower prices for bulk purchasing and to reduce the administrative costs of tendering.

Site Purchasing Procedures (does not include procedures for “School Generated Funds”)

14. 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 or work site budgets are delegated to the school Principal or Department Manager. Accordingly, purchases will be made in the following manner:
 - a. Purchase orders will
 - i. be prepared at the school or work site and will include the agreed quantity, price, description and delivery arrangements.
 - ii. represent the contractual obligation between the district and the supplier.
 - iii. should be prepared for all purchases except in those instances where petty cash, cheque requisition or the use of a purchasing card is more appropriate and more efficient.

15. The purchase order will be approved at the school or worksite by the Principal/Vice-Principal or Department Manager.
16. The school or worksite prepares all purchase orders, and sends one copy to the supplier and one copy to the school board office.

Tendering Procedures

17. Invitations for tender (Requests for Offer, RFO and Requests for Proposal, RFP) will be required on the procurement of all goods, services and construction valued at \$75,000 and greater.
18. Invitations for tenders meeting the criteria of AIT and TILMA/;
 - a. must be posted electronically on the provincial website “BC BID”;
 - b. should also be placed in one or more of the following media: local newspapers regional newspapers provincial newspapers; and trade journals

Sealed tenders are to be received and not opened until the date and time specified on the tender. All tender envelopes shall be date stamped or handwritten, showing the date and the time of receipt. Tenders received are to be secured in a vault, safe, or other secure area until the closing date. All RFO tenders must be opened in public on the day of tender closing. The results of the RFO tender are public information. All tenders are to be opened by a committee of at least two (2). The committee shall include the Secretary-Treasurer or designate. At the time the tenders are opened the names of bidders and bid amounts shall be recorded.

19. RFP tenders are not subject to public opening but must be opened on the day of closing by at least two members of the selection committee of which one shall be the Secretary-Treasurer or designate. All tenders shall clearly state that for a tender to be considered, it must be received at the Board Office, or other location as indicated on the tender document, on or before the time and date of closing.
20. All tenders shall clearly state the selection criteria and the clause “the lowest or any tender will not necessarily be accepted”. The selection criteria may include factors other than price in choosing the successful Bidder including, without limiting the generality of the foregoing, the relative experience of the various Bidders in carrying out similar work, previous work record, the relative experience of the various Subcontractors named by the various Bidders, the Alternative Prices and Separate Prices called for in the invitation to tender and offered in the tender, and the work schedules proposed by the various Bidders.

References:

- BC School District Financial and Accounting Manual
- Agreement on Internal Trade (AIT) Annex 502.4
- The British Columbia - Alberta Trades, Investment and Labour Mobility Agreement (TILMA)