

ADMINISTRATIVE REGULATIONS

TITLE: PURCHASING

CATEGORY: FINANCE

NUMBER: 5060

I. Rationale:

School District No. 46 (Sunshine Coast) must maintain high legal, ethical, managerial, and professional standards in the management of the resources entrusted to it as a publicly funded institution. Goods and services must be acquired in a manner that ensures the district:

- A. obtains value for money by incurring the lowest cost in the fulfillment of specified needs with appropriate levels of quality and service;
- B. uses a fair and open process when calling for, receiving, and evaluating quotations and tenders;
- C. meets its statutory, legal and ethical obligations in the acquisition of goods and services by purchase or lease.

II. Principles:

- A. Goods and services shall be acquired according to the following principles:
 - 1. Planning – Goods and services should be acquired after consideration of needs, alternatives, timing, and availability of funds.
 - 2. Sourcing – The process by which suppliers compete for school district business shall be open, fair, consistent, and non-discriminatory.
 - 3. Purchasing – Goods and services shall be acquired competitively from qualified suppliers to meet specified needs and to achieve the best value for money expended.
 - 4. Accountability – Approvals shall be obtained and documentation shall be retained for review and auditing.

III. Authority And Process:

- A. The Secretary-Treasurer is responsible for overseeing all purchasing, and provides a centralized purchasing resource to facilitate the acquisition of goods and services required by School District No. 46 (Sunshine Coast).
- B. All purchases made in the name of the Board or of a school become the property of the Board. The same conditions apply to donations to the Board or school. The Board reserves the right to refuse any donation or purchase.
- C. School District No. 46 (Sunshine Coast) authorized buyers of goods or services (“Purchasers”) are responsible for ensuring the research of purchase requirements, contacting vendors, obtaining quotes, and obtaining other supporting documentation for the purchase.

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- D. Where a supply contract is in place (e.g.: EDCO, BCEM), authorized buyers may purchase from tendered product lists without obtaining alternative pricing.
- E. Purchase Orders must be generated and approved for purchases over \$1,500 and are the only authority to purchase goods or services on behalf of the School District. Purchases in excess of \$10,000 must have the prior approval of the Secretary-Treasurer in accordance with School District No. 46 Administrative Regulation 4200 – Decentralized Decision Making.
- F. The following are the threshold values for the evaluation of all goods and services purchases except where there is a supply contract in place:
1. Below \$500 – The purchaser should use their judgment when determining best value, based on cost, quality and convenience. Three quotes are not required, but the purchaser should periodically seek competitive pricing for recurring purchases.
 2. \$500 - \$1,500 – Three verbal quotes required.
 3. \$1,500 - \$5,000 – Three verbal quotes required and quotes are to be documented and filed with the purchase order.
 4. \$5,000 - \$75,000 – Three written quotes are required with a formal, written evaluation of the quotations.**
 5. Over \$75,000 – Formal tender is required to be posted on BC Bid through the office of the Secretary-Treasurer for goods and services.
 6. Construction Contracts Over \$200,000 – Formal tender is required to be posted on BC Bid through the office of the Secretary-Treasurer.
- **When the required good or service is valued at under \$75,000, a tender still MAY be posted on BC Bid at the buyer's discretion in consultation with the Secretary Treasurer.
- G. Whenever possible, authorized buyers of goods and services will solicit bids from local vendors. In accordance with the principles of applicable trade agreements, no supplier of comparable goods or services should be accorded less favourable treatment than the best treatment provided to any other supplier.
- H. School District No.46 (Sunshine Coast) will obtain competitive prices for all supplies, equipment and services except in the following situations:
1. An emergency exists as determined by the Secretary-Treasurer and requirements cannot be satisfied in time by means of a competitive process;
 2. A process delay would interfere with School District No. 46 (Sunshine Coast) ability to maintain security or order, or to protect human or animal safety;
 3. The required service is confidential; or

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4. It can be proven that only one contractor is qualified to provide the service.
- I. The Board reserves the right at all times to reject some or all bids, to not award the contract or purchase, or to re-tender.
- J. In the case of a single vendor, the person responsible for the purchase is required to present evidence that only one vendor can provide the good or service.
- K. Only the Secretary-Treasurer is empowered to commit the credit of School District No. 46 (Sunshine Coast), except for those instances where the Secretary-Treasurer has specifically delegated this power.
- L. Multi-year contracts can only be authorized by the Secretary-Treasurer.
- M. Contracts containing indemnity clauses can only be authorized by the Secretary-Treasurer.
- N. Individuals who obligate School District No. 46 (Sunshine Coast) without authorization may be held personally responsible for the commitment.
- O. School District purchasing cards may be issued to an employee routinely involved in purchasing supplies and services. Applications for purchasing cards must be approved by the Secretary- Treasurer. Detailed information on the use and responsibilities of the School District Purchasing Card can be found in the [School District No. 46 Purchasing Card Agreement with Employees](#).
- P. Technology purchases should generally be coordinated through the technology department. "Technology" includes, but is not limited to, computers, document cameras, projectors, printers, cameras and other hardware used by staff or students. Any technology that was not purchased through the technology department must be approved prior to use in order to protect the integrity of the district network and to ensure the safety of students and staff.
- Q. Furnishings purchases should generally be coordinated through the facilities department. "Furnishings" means any carpets, tables, chairs, pillows, etc. brought into the school for student or staff use. All furnishings:
 1. Must be purchased new;
 2. Must be made from non-absorbable material, i.e. leather, vinyl;
 3. Must be able to be wiped and sanitized (except carpets);
 4. Must meet commercially approved standards.
- R. Gift cards may be purchased, provided **all** of the following conditions are met:
 1. The gift card comes with money already on it and can only be used for the purchase of goods or services from a single retailer or a group of retailers

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- identified on the card; and
2. The terms and conditions of the gift card clearly state that amounts loaded to the card cannot be converted into cash; and
 3. A log is kept to record gift card information containing **all** of the following:
 - a) Name of the recipient
 - b) Date the gift card was provided
 - c) Reason for providing the gift card
 - d) Type of gift card
 - e) Amount of the gift card
 - f) Name of the retailer(s)
 5. The overall value of gifts to employees in a calendar year must not exceed \$500, including gift cards.

IV. Conflict of Interest:

- A. School District No. 46 (Sunshine Coast) employees engaging in the purchasing function will be free of interests or relationships that are actually or potentially inimical to the best interests of the School District. In order to avoid a possible conflict of interest, any employee who has financial or other interest in a supplier company, either directly or indirectly through members of his/her immediate family, must report such financial or other interests in writing to the Secretary-Treasurer who will determine whether the interest is sufficient to disqualify the vendor. Employees who believe they may have a conflict of interest must remove themselves from the specified procurement.

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References: Policy 12 (Role of Secretary-Treasurer), Policy 18 (Local Purchasing)