

# AP 504

## Purchasing

### Background

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The purpose of this administrative procedure is to ensure that quality supplies, services, and equipment are procured for the Abbotsford School District at the best value (cost, delivery, quality, and service), and that the purchasing process is consistent, efficient, and fair. This section provides guidelines for purchasing supplies, services, and equipment. All processes must comply with Canada's Anti-Spam Law

### Procedures

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#### 1. Principles of Purchasing

1.1 The following statements guide our purchasing practices in the district:

- i. The district will strive to ensure the principles of fairness, integrity, accountability, and transparency are respected in all business and procurement transactions.
- ii. The district will adopt the best practices in procurement as are commonly used and defined within the public education sector and those which are provided by the Auditor General of the Province of British Columbia.
- iii. The district is committed to remain current with best practices in the public education sector and will comply with any subsequent change in legislation and or trade agreements.

1.2 All staff must comply with all of the district policies and legal requirements. This will include trade agreements such as the New West Partnership Agreement (NWPTA), the Canadian Free Trade Agreement (CFTA) and processes for importing products (customs). Staff should consult the Purchasing Department for further information.

1.3 All staff should declare any potential or apparent conflicts of interest where contracting for goods or services are involved. Where there are conflicts of interest, those with a conflict shall be excused from recommendation and approval processes. All employees must avoid activities which could compromise their objectivity in decisions such as favouritism or the receiving of personal benefits.

1.4 Wherever possible and reasonable, purchases will be made from vendors in the preferred location order of:

- i. Local and Indigenous
- ii. Provincial
- iii. National
- iv. International

1.5 Post-contract supplier evaluations will be conducted to ensure there was an objective assessment of value for money received by the District.

1.6 No District employee may use the district identity or resources (i.e. corporate discounts) in the acquisition of goods or services for personal use or gain, unless specifically authorized by this or any other District policy or employee purchasing program.

2. Purchase Orders

Major supplies, services, and equipment required to operate schools and educational programs throughout the school district will be acquired as set out in the district’s Purchasing Manual, regardless of the source of funds. Orders will be issued to suppliers on prescribed district forms approved by and executed on behalf of the Secretary-Treasurer.

3. Requisition/Purchase Order Authorizations

Principals, and in their absence, Vice Principals, District Managers, and other individuals with budget authority for an account are authorized to approve expenditures in accordance with the limits identified below and applicable budget limits. Examples include such things as purchase requisitions, requests for work to be done by maintenance staff that will incur charges, approving invoices, etc.

Principals/District Managers/Purchasing Buyer	up to \$10,000
Assistant and Associate Superintendents & Directors (Learning Support Services and Curriculum)	up to \$20,000
Directors (IT, Facilities, Finance)/Purchasing Manager	up to \$75,000
Secretary-Treasurer and Superintendent	up to \$7,500,000*
Board of Education	Over \$7,500,000

Principals and district managers may, in consultation with the purchasing Manager, delegate approvals to support staff up to a maximum of \$2,000

\*Will supply information to the Audit Committee for approvals over \$1,000,000

4. Bulk Purchasing

Wherever possible, requisitions and purchases will be arranged at times and in quantities that will satisfy annual need, the availability of funds, and the opportunity to obtain the best value to the district.

5. Purchasing Guidelines

5.1 Purchases up to \$25,000

Purchases up to \$25,000 may be purchased with the discretion of the applicable budget manager. Multiple quotations are recommended, but not required.

### 5.2 Purchases between \$25,000 and \$75,000 or under \$200,000 for Construction

Purchases for goods and services between \$25,000 and \$75,000, or under \$200,000 for construction may be purchased after obtaining three written quotations from known sources of supply using established purchasing methods.

### 5.3 Purchases over \$75,000 and over \$200,000 for Construction

Purchases in this dollar range must follow a formal procurement process administered by the Purchasing Department and advertised on the acceptable government procurement portal (example BC Bid) and other media as appropriate.

Processes and guidelines for tendering and contracting to acquire goods and services are detailed in the district's Purchasing Manual.

## 6. Sole Sourcing

In exceptional circumstances, the Secretary-Treasurer may authorize acquisition from a sole source.

These exceptional circumstances would involve an urgent requirement to:

- protect and ensure the safety of students and staff
- protect school district assets
- prevent a serious financial loss to the district
- maintain fleet standardization

## 7. Contractual Agreements for Services

All contractual agreements for services (such as independent contractor agreements, leases, etc.) must be signed by the Secretary Treasurer with the following exceptions:

- Single events with a value of less than \$7,500
- Regular district operations and maintenance agreements up to \$75,000

## 8. Best Value Criteria

In determining the best value, the following factors will be considered:

- price and availability
- ability to meet product specifications
- products that meet or exceed the district's environmental management standards.
- preference for purchasing from local vendors
- ability to provide service and warranty support (including past performance)
- availability of replacement parts

## 9. Other Considerations

In all purchasing transactions, employees will:

- consider first the interest of the school district system and the improvement of its educational programs.
- decline gifts that might in any way influence the purchase of school supplies and equipment.
- refrain from soliciting funds or material from vendors, however worthy the purpose.

- refrain from asking for special discounts or prices on items purchased from school district suppliers for personal use.

#### 10. Equipment: New and Replacement

To ensure consistency in the overall quality, brand and serviceability of equipment, the district's Purchasing Department will coordinate the acquisition of equipment for new schools and replacement of equipment in existing schools. Products that fall within this process include:

- furniture
- fleet vehicles
- information technology
- software