

SUPERIOR-GREENSTONE DISTRICT SCHOOL BOARD

Section BUSINESS AND TRANSPORTATION

Policy Name PURCHASING

303

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POLICY

Superior-Greenstone District School Board's goal when buying goods and services is to obtain maximum value for public funds expended in a manner consistent with publicly acceptable purchasing practices while meeting the educational needs of the system.

PROCEDURES

1.0 Definitions

The following definitions are understood to apply:

- a) Request for Quotation (RFQ): A Request for Quotation is an offer to execute work or supply goods when specifics are known and determined (used for smaller dollar requirements).
- b) Request for Proposal (RFP): A Request for Proposal is a document used to request suppliers to supply solutions for the delivery of complex products or services or to provide alternative options or solutions. The RFP uses predefined evaluation criteria, in which price is not the only factor.
- c) Request for Tender (RFT): A Request for Tender is a document used to request supplier responses to supply goods or services based on specific delivery requirements, performance specifications and terms and conditions. The RFT evaluation criteria are predominantly price and delivery requirements.

2.0 Supply Chain Code of Ethics

All employees involved with supply chain-related activities must conduct themselves in accordance with the Ontario Broader Public Sector Supply Chain Code of Ethics, attached as Appendix A.

3.0 Broader Public Sector (BPS) Procurement Directive

The Board will abide by and adhere to the Ontario Broader Public Sector Procurement Directive, attached as Appendix B.

4.0 Authorization to Purchase Goods & Services

Authorization to purchase goods and services in accordance with this policy is granted by the Board to Administration within the limits of the approved budgets and in accordance with the Approval Authority Schedule as set out below.

In the event that budgets have not been approved by the Board prior to the commencement of a fiscal year, the Administration is authorized to make only those purchases which are necessary for the continuation of existing programs and services.

Approval Authority Schedule

Position Title	Purchase Limit
Board of Trustees approval required	Over \$500,000
Director of Education and Superintendent of Business	\$500,000
Manager, Plant Services and Manager, Financial Services	\$100,000
Manager, IT Services	\$50,000
Principal and Vice Principal	\$5,000

5.0 Competitive Procurement Thresholds

The purchasing process which must be used is determined by the total value of goods and services to be purchased. In the case of a multi-year lease or contract, the total payments over the life of the lease or contract including extensions shall be used to determine the total value.

It is not acceptable to break a single purchase into multiple purchases in order to reduce the estimated dollar value of the purchase and to avoid the dollar limits indicated below.

For Goods and Non-Consulting Services	
Total Purchase Amount	Purchasing Process to be Used
Less than \$100	Purchases amounting to not more than \$100 may be made by Petty Cash. Competitive quotations are not required; however, reasonable effort must be made to ensure the best value for the Board.
Less than \$2,000	Purchases amounting to not more than \$2,000 may be made by P-card/Credit Card, Cheque Request or Purchase order. Competitive quotations are not required; however, reasonable effort must be made to ensure the best value for the Board.
More than \$2,000 but less than \$5,000	Purchases amounting to more than \$2,000 but less than \$5,000 will be made by purchase order processed directly by the department manager, school principal or designate. Competitive quotations are not required; however, reasonable effort must be made to ensure the best value for the Board.
More than \$5,000 but less than \$100,000	Purchases amounting to more than \$5,000 but less than \$100,000 will be made by purchase order after obtaining at least 3 written quotes (where possible).

\$100,000 and more	Purchases of \$100,000 or more will be made by Tender/RFP/RFQ issued by the department responsible. Supporting documentation will be held on file by the department.
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For Consulting Services	
Total Purchase Amount	Purchasing Process to be Used
Less than \$100,000	Where possible, at least 2 written proposals are to be obtained from consultants clearly stating contract amount and service description prior to submitting a purchase order for approval. Supporting documentation must be attached to the purchase order or contract.
\$100,000 and more	Formal requests for proposals are to be issued by the department on an open competitive basis. Supporting documentation will be held on file in the department.

Note: Consulting services are defined as “the provision of expertise or strategic advice that is presented for consideration and decision making.” Consulting services for the purpose of this policy excludes services that are required by legislation or regulation to be provided by the following licensed professionals: medical doctors, dentists, nurses, pharmacists, veterinarians, engineers, land surveyors, architects, accountants, lawyers and notaries.

6.0 Non-Authorized Purchases

Goods purchased in the name of the Superior-Greenstone District School Board without authorization by purchase order or other approval may be considered an obligation of the individual and not an obligation of the Board.

The Superintendent of Business has authorized the following exceptions to the requirement for a purchase order: regular utility payments, hotel accommodations, course registrations, catering, groceries and purchases through Petty Cash.

7.0 Purchases for Personal Use

Items for personal use of employees may not be purchased through the Board.

8.0 Exceptions

The Superintendent of Business shall be permitted discretion in the application of item 5.0 above, if:

- a) The preferred number of competitive bids cannot be obtained, or,
- b) It is more appropriate to purchase a particular make or model or brand to ensure compatibility with existing equipment and/or procedures, or,
- c) It is more appropriate to deal with a particular supplier for reasons of service or delivery.

9.0 Tender Opening

Each tender shall be opened by the department manager in the presence of two (2) Board representatives. In most cases, the representatives will be Board Administrators.

Alternate arrangements for opening tenders may be approved by the Superintendent of Business, but must be outlined in the tender document.

10.0 Release of Tender Information

In all cases, information on a successful tender shall only be made available upon request from a supplier who had submitted a written, competitive bid for the item(s) in question.

11.0 Staff: Gifts and Gratuities

No Board employee connected either directly or indirectly with the purchasing function shall accept any gift, gratuity or any other complimentary gesture from a supplier or potential supplier to the Board.

12.0 Co-operative Purchasing

Co-operative purchasing agreements may be entered into with other public bodies with the written approval of the Superintendent of Business. In such cases, the pricing obtained by other public bodies will be accepted and there will not be any further requirement to solicit independent pricing quotations or tenders.

13.0 Superintendent of Business

Any questions regarding this policy should be directed to the Superintendent of Business.

Ontario Broader Public Sector (BPS)
Supply Chain Code of Ethics

Goal: To ensure an ethical, professional and accountable BPS supply chain.

1. *Personal Integrity and Professionalism*

Individuals involved with Supply Chain activities must act, and be seen to act, with integrity and professionalism. Honesty, care and due diligence must be integral to all Supply Chain Activities within and between BPS organizations, suppliers and other stakeholders. Respect must be demonstrated for each other and for the environment. Confidential information must be safeguarded. Participants must not engage in any activity that may create a conflict of interest, such as accepting gifts or favours, providing preferential treatment, or publicly endorsing suppliers or products.

2. *Accountability and Transparency*

Supply Chain Activities must be open and accountable. In particular, contracting and purchasing activities must be fair, transparent and conducted with a view to obtaining the best value for public money. All participants must ensure that public sector resources are used in a responsible, efficient and effective manner.

3. *Compliance and Continuous Improvement*

Individuals involved with purchasing or other Supply Chain Activities must comply with this Code of Ethics and the laws of Canada and Ontario. Individuals should continuously work to improve supply chain policies and procedures, to improve their supply chain knowledge and skill levels, and to share leading practices.

Ontario Broader Public Sector (BPS)
Procurement Directive

The BPS Procurement Directive can be found on the following site:

<https://www.ontario.ca/page/broader-public-sector-accountability>

The current Directive, as of July 01, 2011 is also attached in this Appendix.