

School District #62 (Sooke)

PURCHASING	No.: F-200
	Effective: Mar. 27/84 Revised: Mar. 24/87; Apr. 10/89; Apr. 12/94; Oct. 28/03; June 27/17 Reviewed: May 15/17

ADMINISTRATIVE REGULATIONS

Guiding Principles

1. The purchase of goods and services will consider educational and operational needs, price, delivery, and quality of the product/service, to determine the best purchase.
2. Purchases over \$5,000 will be made after receipt of competitive quotes.
3. Purchases will support local business including local First Nations businesses, when all other factors are equal.
4. Purchases will comply with Interprovincial Trade Agreement(s).
5. Purchases will comply with all Board policies.
6. Purchases will comply with Administrative Procedures.
7. Purchases that fail to comply with this or any other Board policy or Administrative Procedure may negate the District’s responsibility to pay for the goods or services.
8. The joint purchasing group tenders and Provincial Government agreements available for school district use will be used for purchases whenever possible.
9. Purchases will be compliant with health and safety and WCB regulations.
10. Technology equipment orders will be reviewed by the information systems department prior to purchase to ensure compliance with the district technology plan and ability of district technology staff to support.
11. The use of contracted services for installations must be coordinated through the facilities department to ensure compliance with regulations and the collective agreement.
12. Delivery of heavy goods where the supplier will not unload needs to be coordinated with the facilities department to ensure appropriate safe procedures for unloading.
13. The use of purchasing cards is intended to facilitate the purchase and payment of materials required for the conduct of district business.

General

1. Staff are responsible for:
 - a. Informing the Finance Department in writing of all staff granted administrative authorization to purchase on their behalf and any changes to administrative authorization granted to departmental employees;
 - b. Planning, managing and fully documenting the process to acquire goods, services and construction;
 - c. Using all existing joint purchase group tenders and Provincial Government agreements available for school district use whenever possible;
 - d. Managing solicitation and contract award processes in a prudent and unbiased manner that fairly treats all potential vendors and bidders;
 - e. Ensuring that contracts for goods, services and construction are designed to provide the best value to the District;
 - f. Ensuring compliance with this regulation.

2. The Finance Department is responsible for:
 - a. Providing official communications and interpretations of this procurement policy;
 - b. Monitoring and reporting for compliance with this procurement policy;

Pre-award and Solicitation

1. The joint purchasing group tenders and Provincial Government agreements available for school district use will be used for purchases whenever possible.
2. A listing of some Provincial Government agreements available for school district use can be found on the government's BC Education Marketplace (BCEM) website [here](#).
3. **Consistent with the District's Code of Conduct**, an employee must not participate in a contracting decision if the contract involves a direct relative, a person married to a direct relative, or a person sharing the same household as the employee. A direct relative means a spouse, parent, grandparent, grandchild, brother, sister, son, or daughter.
4. Staff may directly acquire goods and services when an unforeseen emergency exists. Emergency Purchase Orders (EPOs) must only be used to meet extraordinary deadlines that have pre-empted the ability to access the normal acquisition processes for goods and services.
5. The permitted response time to a solicitation must be sufficient to allow all potential proponents to have a reasonable opportunity to compete, taking into account the time required to disseminate information, the complexity of the procurement, and the time required to prepare an appropriate response.
6. Objective selection criteria for the awarding of a contract must be established prior to inviting bids and proposals and must be consistent with those specified in the solicitation documents. Selection procedures and timelines must not limit anyone from competing.
7. The solicitation instruments and forms of purchase are to be observed within the monetary thresholds set out in Table 1 when making purchases on behalf of the school district.

TABLE 1		
SOLICITATION INSTRUMENT	FORM OF PURCHASE	AGGREGATE VALUE OF TRANSACTION
GENERAL GOODS AND SERVICES		
Best price effort to extent deemed appropriate.	Purchase Order (PO) or Credit/Purchase Card	Up to and including \$5,000
Written quotations are to be obtained from not less than three (3) vendors who are known to be able to provide the quality of goods or services required.	Purchase Order (PO) or contract	\$5,001 to \$75,000
Posting on BC Bid using an appropriate solicitation process such as: - Request for Proposal (RFP) - Invitation to Quote (ITQ)	Purchase Order (PO) or contract	Over \$75,000
CONSTRUCTION		
Best price effort to extent deemed appropriate.	Purchase Order (PO) or Credit/Purchase Card	Up to and including \$5,000
Written quotations are to be obtained from not less than three (3) vendors who are known to be able to provide the quality of goods or services required.	Purchase Order (PO) or contract	\$5,001 to \$200,000
Posting on BC Bid using an appropriate solicitation process such as: - Request for Proposal (RFP) - Invitation to Quote (ITQ)	Purchase Order (PO) or contract	Over \$200,000

8. BC Bid (<http://www.bcbid.gov.bc.ca/open.dll/welcome>) is the Province's online tendering system. Ministries, Crown corporations and public bodies use the system to distribute Opportunity Notices, complete bid documents and bid results for suppliers. BC Bid offers suppliers unrestricted access to government procurement.

Contract Award – all procurement

1. Direct Awards

- a. Contracts for acquisitions (of goods, services, and construction) may be negotiated and directly awarded without competitive process where one of the following exceptional conditions applies:
 - i. the contract is with another government organization;
 - ii. staff can strictly prove that only one contractor is qualified, or is available, to provide the goods, services or construction;
 - iii. the goods or services require compatibility with existing goods or services, or may void any warranties or guarantees;
 - iv. pricing has been established by joint purchase group tenders and Provincial Government agreements available for school district use;
 - v. an unforeseeable emergency exists and the goods, services or construction could not be obtained in time by means of a competitive process;
 - vi. a competitive process would interfere with the District's ability to maintain security or order or to protect human, animal or plant life or health; or
 - vii. the acquisition is of a confidential or privileged nature and disclosure through an open bidding process could reasonably be expected to compromise confidentiality, cause economic disruption or be contrary to the public interest.
- b. The contract manager is responsible for documenting, in the contract file, the rationale, or the circumstances, that supports the use of one or more of the above exceptions. This documentation must be appended to the contract file and be available when requested.

2. Selection and Award

- a. Staff must award contracts on the basis of the criteria set forth in the solicitation documents.
- b. The rationale for the ranking of all proponents must be documented.
- c. Staff must participate in the evaluation process to select the successful contractor(s).
- d. Before considering a bid or proposal, staff must ensure that it meets all mandatory requirements specified in the solicitation documents.
- e. In the case of Invitation to Tender (ITT) and Invitation to Quote (ITQ), contracts must be awarded to the lowest-priced qualified bidder meeting the terms and conditions of the solicitation document.
- f. In the case of a Request for Proposal (RFP), the contract must be awarded to the proponent whose proposal meets all mandatory proposal requirements, and achieves the highest overall rating of all evaluation criteria specified in the solicitation documents.
- g. Staff must not do or say anything to create a verbal contract on behalf of the District.
- h. Multi-year contracts are permitted when the stability of the longer time frame supports better value to government. However, they must not be established through ongoing amendments and extensions of standard term contracts, unless the extensions were planned and included as part of a competitive process.
- i. Staff where practical and depending on the size of the contract, must undertake measures to conduct appropriate due diligence on prospective contractors such as, but not limited to:

credit and background checks; business reference checks; and identification of shareholders, directors and officers of the company.

3. Administration

- a. Staff must maintain adequate contract documentation for all phases of the procurement process, including planning, solicitation, award, management, amendments, schedules of payment, progress reports and contract evaluations.
- b. Contracts must be in writing and signed and delivered by all parties prior to the commencement of the work or service (or, in the case of an emergency, as soon as possible thereafter).
- c. Contracts must be made in the contractor's legal name. Each contract must be approved and signed by the appropriate authority. In no circumstances should an unauthorized employee or agent legally bind the District with apparent authority.

Purchasing Cards

1. As stated in Table 1 above, all goods and services up to \$5,000 may be procured by purchasing card.
2. Purchasing Card procedures, responsibilities and principles are stated in Administrative Procedure #12.
3. The District's Administrative Procedures are listing on the District's Sharepoint website under HR Information (<https://go.sd62.bc.ca/HR%20Lists/Administrative%20Procedures.DOC>)

Purchase Orders

1. As stated in Table 1 above, all goods and services over \$5,000 shall be procured by purchase order or contract.
2. Requests for goods or services not covered by a Standing Purchase Order are to be submitted to the Finance Department by completing the Requisition to Purchase Form.
3. Appropriate signing authorization, a valid account number, and all supporting documentation must accompany all purchase requests.
4. Supporting documentation to be submitted include, where applicable, either the three (3) written quotes received, or the documentation from the solicitation process (for example RFP, ITT, TTQ).