

**PRINCE ALBERT ROMAN CATHOLIC SEPARATE SCHOOL DIVISION NO. 6**

**POLICY ITEM: Purchasing of Goods and Services**

**CODE: DJB**

**LEGAL STATUS: Board Motions #83.01, #47.08, #75.12, #26.18, #95.19, #286.25**

**DATE APPROVED: 22Jan18, 15April19, 24Nov25**

**Background**

In exercising sound fiscal stewardship and fiscal responsibility, the Board of Education is committed to offering suppliers the opportunity to provide necessary goods and services required by the school division.

**Policy**

**The Board of Education directs the Chief Financial Officer to ensure that the purchase of all goods and services shall be made to benefit the school division in accordance with purchasing procedures established and approved by the Board.**

**Definitions**

Supplier - A person, corporation, partnership, or other organization that provides goods or services.

Fiscal Stewardship – A responsible and ethical management of financial resources to achieve organizational goals, ensuring long term sustainability and accountability.

Invitation to Tender – A process where bids are received through a formal competition open to all interested parties. Invitation to Tender is posted to a recognized public electronic tendering system and advertised on the school division web site. Vendors who have participated in previous similar tenders may be contacted but the competition is open to all qualified suppliers.

Request for Proposal – A process for obtaining written proposals from competing suppliers and evaluating those proposals against stated requirements, using a predefined evaluation process and a predefined set of evaluation criteria.

Formal Quotation – A process where written quotations are received by request from qualified suppliers selected by the school division. Quotations are received to a specified date and time and may or may not be advertised or required to be opened publicly.

Informal Quotation – A process where price quotations are received from selected suppliers verbally or in writing with no specified closing date and time.

Standing Offer – An agreement that provides for a supplier to supply specified products or services for a specified period of time with actual requirements to be determined, requested and delivered when and as required, typically issued after completion of Formal or Informal Quotation process.

Construction – a construction, reconstruction, demolition, repair or renovation of a building. Includes the supply of equipment, machinery, products or materials and the installation and/or repair of fixtures of a building.

Single Source – A specific supplier is selected to provide goods and/or services without utilizing a normal competitive process.

Sole Source – A specific supplier is the only supplier of goods and/or services that are required

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## Guidelines

1. Purchases up to \$15,000
  - a. Any one item, or an accumulation of items, not exceeding \$15,000 in value may be purchased based on the department/school knowledge of, or experience with, a supplier. These purchases will typically utilize the Informal Quotation and/or Standing Offer processes.
  - b. Orders will not be split for the purpose of circumventing limitations contacted in this process.
2. Purchases over \$15,000 and up to \$75,000
  - a. Any one item, or accumulation of items, over \$15,000 but not exceeding \$75,000 in value typically will be purchased using the Formal Quotation process, unless a Request for Proposal or Invitation to Tender is more applicable.
  - b. A Request for Proposal process is typically used when the purchase is not solely a product or commodity but is more in the nature of a solution to a problem or need where the solutions are expected to be quite varied and/or difficult to evaluate or cost is not the only selection criteria.
  - c. An Invitation to Tender process is typically used when a clearly defined product or services is being requested and the evaluation of which will heavily emphasize cost.
  - d. Formal quotations, proposals, or tenders should be obtained from no fewer than 3 suppliers, if possible.
  - e. Orders will not be split for the purpose of circumventing limitations contacted in this process.
3. Goods and Services Purchases over \$75,000 or Construction over \$200,000
  - a. Any one item, or accumulation of items, of goods and services over \$75,000 or construction over \$200,000 in value must be purchased through the Request for Proposal or Invitation to Tender process.
  - b. A Request for Proposal process is typically used when the purchase is not solely a product or commodity but is more in the nature of a solution to a problem or need where the solutions are expected to be quite varied and/or difficult to evaluate or cost is not the only selection criteria.
  - c. An Invitation to Tender process is typically used when a clearly defined product or services is being requested and the evaluation of which will heavily emphasize cost.
  - d. A Request for Proposal or Invitation to Tender is also required when:
    - The Director of Education, or designate, deems it to be in the best interest of the school division;
    - It is a requirement of the *Education Act 1995*;
    - It is a requirement of applicable trade agreements, including *New West Partnership Trade Agreement ("NWPTA")*, *Canadian Free Trade Agreement ("CFTA")*, and/or

*Canadian-European Union Comprehensive Economic and Trade Agreement ("CETA")*, for goods, services, and construction.

- Orders will not be split for the purpose of circumventing limitations contacted in this process.

#### 4. On-Demand Professional Services

- a. On-demand professional service purchases will typically be made under a Standing Offer with selected suppliers.

#### 5. Time to Prepare and Submit and Time to Respond Under Formal Processes

- a. A reasonable period of time will be offered to suppliers to submit a Tender, a Request for Proposal, and/or a Formal Quotation taking into account the nature and complexity of the specific procurement.
- b. A reasonable period of time will be provided for Prince Albert Catholic School Division to respond to tenders, proposals and/or quotations taking into account the nature and complexity of the specific procurement.

#### 6. Sole or Single Source Purchases

- a. The intent is to conduct a competitive process for all purchases over \$15,000. However, if the following conditions exist, the Director of Education or designate may approve sole or single source purchases, considering value analysis and applying appropriate negotiation methods:
- b. An emergency situation exists;
  - Urgent purchases which precludes normal business processes are required;
  - A confidential situation exists;
  - It is in the best interest of the school division:
    - to comply with Ministry recommended purchases;
    - extension or renegotiation of an existing contract whose services or supply are satisfactory and the costs of a competitive process do not justify its expense;
- c. Proprietary acquisition, warranty requirements, patent rights, license agreements or other obligations exist which may prevent using normal competitive processes.
- d. A specific supplier is the only supplier of goods and services that are required.

#### 7. Criteria for Considering Purchase Decision

- a. Purchase decisions will include, but may not be limited to, the following criteria: product or service specifications; cost of the product or service; quality of previous good/service/supplier experience; warranty; availability; location of supplier.

#### 8. Conflict of Interest

- a. No Board member or employee of the school division shall purchase or lease any goods or services from or through the school division for personal use or gain. No school division Board member or employee utilizing purchasing procedures is to accept any gift or benefit, whether in the form of goods, services, loans, or favours, from any individual, organization, or corporation which is interested in, directly or indirectly,

dealings with the school division, subject to normal exchange of hospitality between persons doing business together.