

# Huron-Superior Catholic District School Board

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**POLICY TITLE:** PURCHASING POLICY (GENERAL)

**Revised:** February 21, 2006

**Approved:** March 31, 1999

**POLICY NO:** 6000(A)

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## **POLICY**

It is the policy of the Huron-Superior Catholic District School Board that the purchasing function be performed in accordance with our stated Vision, Values and Mission Statements. Therefore, our objectives involve:

- ▶ maintaining a competitive atmosphere among suppliers and ensuring that each is treated fairly and without preference;
- ▶ providing efficient services to all schools and departments;
- ▶ obtaining all goods and services at the lowest possible cost, consistent with the best/specified quality of goods and services available and timelines for delivery.
- ▶ obtaining products that have been verified to be manufactured without utilizing child labour and in accordance with ethical manufacturing practices.
- ▶ **securing contracts with uniform suppliers who will agree to the three main assurances of ethical practices:**
  - full public disclosure
  - uphold local labour laws and international standards
  - independent monitoring.

This policy applies to all schools, departments and persons responsible for budget cost centres.

### Guidelines:

1. The Purchasing Officer, through the appropriate Supervisory Officer, shall generally be responsible for the purchase and supply of all materials, equipment and services required by the various departments of the Board's operations and by its schools.
2. For the purpose of this policy, the following personnel responsible for budget cost centres will have authority to approve purchases and sign purchase orders:
  - (a) at the school: the principal or designate
  - (b) at the Education Centre or other Board facility: the Supervisory Officers, Co-ordinators, Consultants, Managers, Supervisors or their designates.

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### **Purchase of Services:**

3. All purchase of services, except for maintenance services (refer to Policy 6000[B]), must be approved by Supervisory Officers or their designates.

### **Purchase Orders:**

- 4.1
  - (a) Unless approved by the Purchasing Officer, all purchases exceeding \$100 shall be made by purchase order.
  - (b) All other purchases shall be paid through the Petty Cash Fund.
  - (c) Confirmation purchase orders shall only be utilized with prior approval of the Purchasing Officer.
- 4.2 All purchase orders must be processed through the Business Department. All purchase orders shall contain the name of the initiator and the signature of the appropriate approving authority before final processing.

### **Tendering and Request for Proposals:**

- 5.1 Verbal Price Quotation - When the total order range is under \$1,000, verbal prices or catalogue prices on a requisition are accepted for all items. Verbal quotations may be obtained for items for a unit value of \$1,000 to \$5,000, where this has been verified by the Purchasing Officer to be necessary, or expedient.
- 5.2 Written Quotation - When purchasing a group of items, or a single item with a total value in the range of:  
\$5,000 - \$10,000 - Two written quotations shall be obtained. The order is normally placed with a lower bidder, providing the quoted item(s) meet the specifications required by the Board.

Notwithstanding the above, the appropriate Supervisory Officer or his/her designate may use the publicly advertised tender or Request for Proposal process whenever he/she judges it to be in the best interest of the Board to do so.

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- 5.3 Over \$10,000 - Public Tenders or Public Request for Proposals shall be called. Tender forms will provide complete specifications of the goods and services required and will be sent to all eligible suppliers. The tender notice shall also be publicly advertised in a newspaper of general circulation in the Board's jurisdiction. The suppliers shall be instructed to provide sealed tenders, addressed to the appropriate Supervisory Officer, or his/her designate, by the tender deadline time and date. Tenders, or Request for Proposals, received after the closing time and date, will not be accepted. Sealed, written changes or corrections will be accepted, if they are delivered to the Board before the tendering time deadline. All tenders or request for proposals received shall be date stamped.
- 5.4 Sealed tenders will be opened in the presence of the appropriate Supervisory Officer or his/her designate and at least two other persons, one of whom should be the Purchasing Officer. Trustees will be invited to attend if they so wish.
- 5.5 The tender opening shall take place as soon as possible after the announced closing time for the submission of tenders.
- 5.6 In making or recommending an award, the Purchasing Agent shall consider the reputation and experience of the supplier, the adequacy of their financial resources, their ability to perform within the time specified, their performance on previous orders, and their ability to provide maintenance or service.
- 5.7 Following the tender opening, the tenders shall be referred to the Purchasing Officer, who will review the tenders to ensure that all specifications have been adhered to. The Purchasing Officer will then prepare a report with recommendation, which will be forwarded to Administrative Council.
- 5.8. The name of the successful bidder and the accepted price on any tender or Request for Proposal, shall be provided to any unsuccessful bidder upon request.
- 5.9 Administrative Council will review the report and recommendation and place the recommendation on the agenda for the next scheduled Board Meeting.
- 5.10 Where the Purchasing Agent deems it to be in the best interest of the Board, specific products and standards may be specified for exclusive use, in a tender or request for quotation. Alternatively, specific products deemed inappropriate may be specifically excluded in a tender or request for quotation.

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Exceptions to the Policy:

Specialized Services:

Certain services are beyond the scope of this policy, as their value is determined by the Board through other contractual agreements, or by resolution. Examples include: employee benefits, insurance, mileage rates, legal and audit services, etc.

Effective Monopolies:

Other services are delivered by virtual monopolies and their value is not open to negotiation. Examples include: hydro, water, cable services, etc.

Unique Supplies:

Certain goods and services are, by their nature, available from only one supplier and, therefore, the opportunity for competitive pricing is precluded or severely restricted. Examples include: textbooks, library books, films and specialized aids for the physically challenged.

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<b><u>ADOPTED</u></b>	Board Meeting - March 31, 1999 Motion B-65		<b><u>DISTRIBUTION</u></b>
<b><u>REVISED</u></b>	Board Meeting - April 16, 2002 Motion B-37	i)	Trustees
	Board Meeting - June 18, 2003 Motion B-63	ii)	Administration
	Board Meeting - February 21, 2006 Motion B-30	iii)	Principals

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