

KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD

POLICY STATEMENT

Section: Business and Administrative Services

• **Purchasing**

Policy Code: BA-5.1

Policy: PURCHASING PROCEDURES

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It is the policy of the Board to ensure ethical, professional and accountable purchasing and supply chain activities, in accordance with the purchasing Code of Ethics, and the laws of Canada and Ontario. The facilities or agencies of the Board shall not be used to purchase or otherwise acquire goods, services or materials for the personal use, benefit or enjoyment of any employee or elected official except where an employee purchase plan has been approved by the Board.

All individuals involved with purchasing or other supply chain related 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 the Board, suppliers and other stakeholders. Respect must be demonstrated for each other and the environment. Confidential information must be safeguarded. No participant shall engage in any activity that may create, or appear to create, a conflict of interest, such as accepting gifts or favours, providing preferential treatment or publicly endorsing suppliers or products.

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 Board participants must ensure that public sector resources are used in a responsible, efficient and effective manner.

All individuals involved in purchasing or other supply chain related activities should continuously work to improve supply chain policies and procedures, to improve supply chain knowledge and skill levels, and to share leading practices.

1. Purchasing and Supply Chain Objectives

It is the policy of the Board that the purchasing function will be performed with the objectives of:

- 1.1 Ethical, efficient, and accountable sourcing, contracting and purchasing activities.
- 1.2 Quality Service delivery – Purchasing Services will ensure proper procurement processes are followed to support the effective and efficient provision of education to students.
- 1.3 Value for money – the Board must ensure maximization of the value received from the expenditure of public funds. Purchasing Services will ensure that purchasing processes provide products and services at the lowest total life-cycle cost of the goods or services required.

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- 1.4 Demand aggregate – Purchasing Services will aggregate the acquisition of common items and/or services, wherever possible across the system, and in conjunction with coterminous boards and other broader public sector organizations, to achieve economies of scale.
- 1.5 Accountability – Purchasing Services, the Board, and its agents must be accountable for the results of procurement decisions and the appropriateness of processes followed, leading to the provision of the required quality products and/or services.
- 1.6 Standardized process – Purchasing Services will ensure that standardized processes and public purchasing practices are followed, using leading practices that remove inefficiencies and allow for open and fair access for suppliers.
- 1.7 Transparency – Purchasing Services will ensure that suppliers have fair access to information on procurement opportunities, processes and results.
- 1.8 Support the purchase of products and/or services that are produced and provided, under humane working conditions, in compliance with accepted international standards and laws.
- 1.9 Procurement activities will comply with legislation and agreements applicable to school boards and other public sector agencies. These include, but are not limited to, the
 - 1.9.1 Agreement on Internal Trade,
 - 1.9.2 Ontario-Quebec Procurement Agreement,
 - 1.9.3 Canadian Law of Competitive Processes and Contract Law,
 - 1.9.4 Freedom of Information and Protection of Privacy Act (FIPPA),
 - 1.9.5 Broader Public Sector Procurement Directive.
- 1.10 Purchasing “environmentally appropriate” products, where possible, which have a level of performance acceptable to the Board.

2. Purchasing Protocols

The Board supports the concept of centralized purchasing. Purchasing Services co-ordinates purchasing of all goods and services necessary for the operation of the Board up to the amounts approved in annual budgets, as well as for special funding initiatives as appropriate. Purchasing Services will seek Contract Vendors of Record (CVOR) and collaborative purchasing agreements, wherever possible, to ensure the

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requirements of this policy and related regulations are fulfilled regarding expenditure of public funds.

Consultants required to provide expert or strategic advice and related services for consideration and decision-making, must be procured through a competitive process irrespective of value. Non-consulting providers who are contracted to provide task-based services must be procured according to the administrative regulations.

All financial commitments of Board funds will be in the form of written and executed contracts and/or authorized purchase orders issued before the goods and services are acquired, or through authorized use of purchasing cards in accordance with approved procedures.

3. Purchasing Approvals

Trustees will be notified and invited to attend all electronic tender and Request for Proposal (RFP) openings. Bid opportunities will be posted by appropriate electronic means on a website complying with advertising requirements of trade agreements and other legislation under which public agencies operate in order to ensure the widest possible access by interested bidders.

- 3.1 Purchasing Services shall ensure the timely opening of bid submissions and be responsible for maintaining appropriate bid opening summaries for all tenders in excess of \$100,000. Bids and award of bids will be posted on the same website where the original opportunity was posted, as appropriate.
- 3.2 Board approval shall be required for:
 - 3.2.1 capital project tenders and consulting services in excess of \$1,000,000,
 - 3.2.2 expenditures which exceed the budgeted amount by 10% and \$100,000,
 - 3.2.3 multi-year commitments where the annual budget amount is greater than \$200,000.
- 3.3 Overall procurement value must not be reduced in order to circumvent thresholds.
- 3.4 The Board reserves the right to ensure that all bid opportunities include the privilege to cancel the process, or not award, based on valid rationale declared in the bid documents provided to all interested parties.
- 3.5 In accordance with provincial legislation, the Board will not purchase goods or services from employees.

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The administrative regulations for purchasing procedures will reflect the above objectives and limitations, and will be in accordance with any provincial/national regulations.

Established: December 17, 1998

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