

## Administrative Procedure 515

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### PURCHASING PROCEDURES

#### Background

The Division requires that purchasing procedures be standardized and appropriately administered throughout the Division.

#### Procedures

1. Principals shall authorize the purchase and supply of all materials, equipment and services, except for:
  - 1.1 Construction/Service agreements;
  - 1.2 Land acquisition;
  - 1.3 Vehicles;
  - 1.4 Upgrades to facilities and grounds; and
  - 1.5 Any equipment exceeding a value of \$5,000.00.
2. Principals shall obtain prior approval by the Superintendent for any exceptions noted above.
3. Sites shall provide for an open tendering of procurement opportunities in accordance with provincial and federal legislation.
4. All items purchased for a site with Division funds or donated shall become the property of the Division.
5. When an employee has identified a personal pecuniary interest in a purchasing decision, the employee shall:
  - 5.1 Provide the necessary purchasing information to the immediate supervisor, who will then make the purchase decision; or
  - 5.2 Make the purchasing decision having excluded the supplier in which he/she has a pecuniary interest.
6. Prior to authorizing payment for contract services, sites shall obtain Workers' Compensation Board clearance and submit copies of such clearances to Accounts Payable with authorization for payment.

7. Sites shall attempt to obtain the maximum value for each dollar expended consistent with good purchasing practices (consideration is to be given to the supplier's reputation and experience as well as the ability to provide after-sales maintenance and service).
8. Purchase of Goods and Services
  - 8.1 Purchasing and contract services will abide by provincial and federal legislation as outlined in the Agreement on Internal Trade (AIT) as well as the New West Partnership Trade Agreement (NWPTA) and the Alberta Trade Investment and Labour Mobility Agreement (TILMA). Purchasing and contract services will abide by the following thresholds:
    - 8.1.1 \$75,000.00 or greater for goods
    - 8.1.2 \$75,000.00 or greater for services
    - 8.1.3 \$200,000.00 or greater for construction
  - 8.2 Authorization is provided to purchase goods or services having an aggregate value of:
    - 8.2.1 Up to \$5,000.00 without obtaining quotations.
    - 8.2.2 Up to \$15,000.00 after receiving verbal quotations from at least three suppliers if practical.
    - 8.2.3 \$15,000.00 or more based on written quotations/proposals. Written quotations/proposals shall be solicited by invitation, newspaper advertisement and/or electronic bidding system (Alberta Purchasing Connection).
  - 8.3 The Division credit card may be used to make purchases of goods and services on behalf of the Division. Transaction limits are approved by the Assistant Secretary-Treasurer or designate. Transaction limits may be increased with prior approval of Secretary-Treasurer. The Division credit card shall not be used for any item exceeding a value of \$5,000.00.
  - 8.4 Trade names and model numbers may be used.
9. Emergency or unforeseen circumstances will be considered on a case by case basis. In the event of an emergency which does not permit established procedure to be followed, the matter shall be decided by the immediate Supervisor. For immediate emergency repairs necessitated through fire, water, sewage, wind or electrical damage, the site supervisor, in consultation with the Superintendent, shall take whatever action is necessary to restore operations.
10. The Secretary-Treasurer may waive the need for competitive bidding in special circumstances, such as:

- 10.1 When the materials, goods or services are urgently needed to continue essential service, provide essential materials or goods, or when there is a threat to health, welfare of people or property, Under these circumstances, prior approval may not be possible.
  - 10.2 When the materials or services are of a proprietary nature or area protected obtainable from only one source of supply.
  - 10.3 When the Division as a result of changing suppliers or service providers would incur significant costs.
  - 10.4 When existing suppliers or service providers continue to provide acceptable materials, goods and services at fair and competitive value.
  - 10.5 When service or provision of goods is short term and not of an ongoing nature.
11. Any single item purchased with a value of \$5,000.00 or greater and an expected life in excess of one year is considered a Capital Purchase. Capital Purchases shall be reported to the Secretary-Treasurer.
12. Tenders and Quotes
- 12.1 Specifications for tender purposes are to be set by the site supervisor making the request.
  - 12.2 All tenders, bids, quotations or proposals must be received in writing either by the Division Office or by an appointed agent, whichever may be indicated, by the deadline to be valid. Any fax or email submissions shall be rejected. Any and all late submissions shall be returned to the bidder unopened and marked late submission with the time and date recorded.
  - 12.3 The opening of quotations will take place at the advertised time and place.
  - 12.4 Evaluation of alternative products is to be made subsequent to the closing of quotations or bids.
  - 12.5 The lowest bid consistent with the specifications will normally be accepted. However, a tender other than the lowest may be accepted, if the reasons in support of such action are deemed by the Superintendent to be in the best interest of the Division.
  - 12.6 The name of the successful bidder, and his price, on each tender called shall be made available upon request.
  - 12.7 A record of tenders or quotations on each article or service for which prices are called, and all quotations and related documents after an award has been made, shall be retained by the site for a period up to one year after an award has been made.

12.8 All requests for quotations for major construction contracts, insurance, contracts and land acquisition shall be authorized by the Secretary-Treasurer..

Reference: Education Act 68, 85, 188, 197, 204, 222, 225 Freedom of Information and Protection of Privacy Act Agreement on Internal Trade, NWPTA, TILMA		
	Date Approved:	April 1, 2021
	Reviewed or Revised:	Executive: April, 2021

References shall be updated as required and do not require additional approval.