



POLICY:

REGULATION: DJ PURCHASING

EXHIBIT:

PURCHASING

1. TENDERS / REQUEST FOR PROPOSALS (RFPs) \$20,000+

All expenditures for the provision of goods and/or services exceeding \$20,000 shall be subject to public tender or RFP process. All tenders and RFPs will be handled through the Secretary-Treasurer. Should a purchase in excess of \$20,000 be financed through a lease, such transactions shall also be subject to this process. It is recognized that exceptions to this policy may be made as follows:

- Where the goods must be compatible with existing equipment
- When an emergency situation is deemed to prevail
- There are long term commitments and/or agreements in place
- The goods or services required are unique in nature which may require a variation to the tender/RFP process

TENDER/RFP FILE

A file shall be developed for every tender/RFP and will contain at least the following:

- copy of the advertisement
- general and specific conditions of the tender/RFP
- tender forms submitted by bidders
- a concise summary of submissions
- a report containing a description of the deliberations of those persons reviewing submissions and determining the recommendation of the award. The report is to also detail any unusual factors influencing the recommendation

ADVERTISEMENT

All tender/RFP advertisements shall be over the name and title of the Secretary-Treasurer or his/her designate. Where information regarding specifications or any other matter is best provided by another staff person that person's name and title shall be included in the public advertisement or invitation.

BOARD APPROVAL

All tenders and RFPs shall be submitted to the Board of Trustees for its approval. Tenders and RFPs may be submitted for board approval by administration or by a standing committee of the Board. In certain circumstances, the Board may empower a standing committee or administration to award a tender on its behalf without its prior approval. However, the awarded tender will be reported to the Board for its information and ratification.

APPROVED: June 30, 2006

REVISED:

SOURCE:

OTHER REFERENCE:



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2. QUOTATIONS (\$5,000 to \$20,000)

QUOTATION REQUIRED

Where goods and/or services are not subject to the tender/RFP process and are anticipated to cost in excess of \$5,000, but less than \$20,000, written quotations shall be obtained from a standing list of interested vendors. Wherever possible, a minimum of three quotations should be obtained. The requirement to obtain quotations will not arise when one or more of the following conditions are met:

- Where the goods must be compatible with existing equipment
- Where an emergency situation is deemed to prevail
- There are long term commitments and/or agreements in place
- The goods or services required are unique in nature which may require a variation to the tender/RFP process

The Secretary-Treasurer or Superintendent will determine whether a purchase is exempt from this process.

QUOTATION FILE

A file shall be developed for every formal quotation and will contain at least the following:

- General and specific conditions of the quotations
- All original quotation forms as submitted by bidders
- A concise summary of quotations.

QUOTATION AWARD

Following the closing time for quotations, a meeting shall be convened by the requisitioner with the Secretary-Treasurer or designate to review quotations received and to determine an appropriate award. The Secretary-Treasurer's department will keep all original documents contained in the quotation file.

3. OTHER ITEMS (less than \$5,000)

REQUISITIONING

For items over \$2,000 and under \$5,000, each school or department shall be responsible for initiating orders by consulting with the Superintendent or Secretary-Treasurer prior to submitting the order to the vendor. The Superintendent or Secretary-Treasurer may require quotations to be obtained for expenditures falling into this category.

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TECHNOLOGY/BUILDING PURCHASES

All technology or building related purchases being made by the schools and/or departments should be reviewed and approved by the respective department manager prior to the order being submitted.

DOLLAR LIMIT/EXCLUSIONS

Generally, schools, departments or authorized employees may make commitments to vendors or service providers for goods or services having a maximum cost, including all applicable taxes, of \$ 2,000.

4. BUDGETARY COMPLIANCE

EXPECTATIONS OF PURCHASER

Staff persons issuing purchase orders or making commitments under the provisions of the policy shall refrain from taking measures that would result in an over expenditure of the related budget. Circumstances necessitating the issuance of a purchase order exceeding budget availability must be reviewed and approved by either the Superintendent or Secretary-Treasurer and reported to the Board.

LEASES/CONTRACTS

When leases/contracts are being contemplated for purchases described under any section of this policy, the lease/contract shall be referred to the Secretary-Treasurer. The Secretary-Treasurer shall be responsible for reviewing the proposed lease/contract and making arrangements for any lease to purchase. All such leases/contracts shall be executed by the Division's signing officers.

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