



AP B4 Purchasing and Tendering

Legislative References: Core Policy and Procedures Manual, Chapter 6: Procurement

Policy Reference: None

Collective Agreement References: None

Date: June 2, 2025

1. Principles of Procurement and Purchasing

- 1.1. To obtain maximum value for the District on all purchases including the life cycle cost of purchases.
- 1.2. To provide reasonable opportunities for qualified suppliers and contractors to seek the School District's business.
- 1.3. To conduct purchasing in an efficient and cost effective manner in accordance with competitive public service purchasing practices.
- 1.4. To select vendors through processes that are transparent and competitive, and to balance the administrative effort and cost with commensurate value of the purchase.
- 1.5. To provide purchasing discretion and flexibility for the District, schools, and departments within granted purchasing authority and subject to optimizing best value for the District as a whole.

2. Key Elements of District Procurement and Purchasing

- 2.1. In all cases, purchases must only be made for the use of the District. District purchases are never intended for personal use or resale.
- 2.2. District staff who participate in the procurement process will act in an ethical manner and the [Supply Chain of Canada's Code of Purchasing Ethics](#) will apply to all those involved in the procurement process.
- 2.3. District staff who participate in the procurement process will follow best practices throughout the process by maintaining notes and documents; providing clearly defined specifications/standards, terms and conditions; and ensuring an impartial procedure to be used in the solicitation and evaluation of bids.



- 2.4. Formal, competitive contracting processes for procurement will be conducted in accordance with guidelines that have been established within the [the Canadian Free Trade Agreement](#) (CFTA), the [New West Partnership Trade Agreement \(NWPTA\)](#) and the [Trade and Labour, Mobility Agreement \(TILMA\)](#) for District requirements exceeding \$75,000 for goods/services/equipment, and \$200,000 for construction undertakings. Formal opportunities to bid will be publicly advertised through the provincial website www.bcbid.gov.bc.ca.
- 2.5. All other factors being equal and in compliance with NWPTA and/or TILMA, purchases will be made with local, Provincial, and Canadian suppliers, in that order of preference.
3. All acquisitions of goods, services, and construction from district funds or district administered funds (ie. School Generated Funds) are subject to these procedures except where indicated otherwise.
4. Contracting Processes for Goods, Services and Equipment
 - 4.1. A variety of procurement methods are available to district staff.
 - 4.2. Contracts
 - 4.2.1. Individual or firm contracts may be established for the appointment of professional advisors including architects, auditors, consultants and lawyers.
 - 4.3. District Credit Cards
 - 4.3.1. Purchases for goods and services may be made by schools, sites, and departments directly. Purchasing cards are issued by the Accounting Department directly to cardholders. The cardholder is responsible for the security, record retention and use of the card.
 - 4.4. Request for Prequalification (RFPQ), Request for Proposals (RFP)
 - 4.4.1. RFEOI and RFPQ are informational processes and do not result in a contract award.
 - 4.4.2. An RFP is an award process, and the award of a contract is determined by the overall value of the contract to the District, usually based on a combination of contract price, service requirements, value for district members, and other criteria as appropriate.
 - 4.5. Invitation to Tender (ITT) and Request for Quotation (RFQ)



- 4.5.1. An ITT is a process primarily used to solicit Bids in the procurement of construction related services. The award of contract is determined by the overall value of the contract to the District, usually based on the lowest-priced bid that meets the District's specifications, and any other criteria as appropriate.
- 4.5.2. An RFQ process may be used to solicit bids for goods, services and equipment and the award of a contract is determined usually based on the lowest-priced bid that meets the District's specifications, and any other criteria as appropriate.
- 4.6. Standing Offer Agreements (SOA)
 - 4.6.1. These are used for the acquisition of standard school supplies and equipment i.e.: stationary supplies, art supplies, P.E. supplies, custodial supplies.
 - 4.6.1.1. Expenditure authorizers can place orders with suppliers with whom the District has a Standing Offer Agreement up to their authorized signatory.
 - 4.6.1.2. The signing authority is responsible to ensure that the purchase requisition contains enough information so that the appropriate goods, services, or equipment are being ordered; and the expenditure is within budget capacity; and the general ledger account coding is accurate.
 - 4.6.1.3. Requests for goods, services, or equipment that are not available through a District Standing Offer Agreement, or by service and systems contracts already in place, shall follow the applicable process and contractual levels per Table 1.
- 4.7. Provincial, Regional and other School District Authorized Purchases
 - 4.7.1. The Provincial Corporate Supply Arrangement (CSA) are available to the District for purchasing.
 - 4.7.2. The Secretary Treasurer will, whenever practical, join in co-operative purchasing with other School Districts or agencies to take advantage of lower prices for bulk purchasing and to reduce the administrative costs of tendering.
- 4.8. Sole Source or Single Source
 - 4.8.1. Where a single source is being considered, a sole source rationale must be provided with the purchase requisition form and shall be submitted by the



Secretary Treasurer for consideration with the exception of Capital construction.

4.8.1.1. The Secretary Treasurer or designate will be the sole judge of whether the rationale is valid and sound and can be supported by the District.

4.8.2. Sole Source or Single Source rationale may not be required under the following circumstances:

4.8.2.1. There is an urgent need and delay would be injurious to the public interest.

4.8.2.2. The nature of the work or the estimated cost of the requirement is such that it would not be in the public interest to invite competitive bids, quotations, or proposals.

4.8.2.3. A substantive investment has already been made and would have to be duplicated by another supplier entering the field.

4.8.2.4. Competition is precluded because of the existence of patent rights, copyrights, intellectual property, or trade secrets.

4.8.2.5. The requested acquisition requires compatibility with existing equipment, logistics, or may void any warranties or guarantees.

4.8.2.6. Source of supply are determined by federal, provincial or other regulatory bodies, or another public agency or cooperative purchasing venture.

5. The Procurement Process and Signing Authority for Expenditures

5.1. Requests for goods, services or equipment shall follow the applicable process and contractual levels per Table 1.

5.2. The signing authority is responsible for ensuring that the purchase requisition is within available budget capacity.

5.3. All Purchases over \$75,000 must be adequately planned so as to allow the appropriate competitive process to be completed.

6. Procurement Process and Contractual Levels

6.1. The procurement of Construction services shall follow the applicable process and contractual levels per Table 2.



6.2. Any exceptions to the contractual levels must be authorized by the Secretary Treasurer.

7. Splitting of requisitions, contracts or contract extensions shall not be allowed as a means to circumvent the procurement process and contractual levels outlined in Tables 1 and 2.
8. The District will not normally enter into purchasing contracts with students, teachers, staff, trustees or members of their immediate families. To avoid a possible conflict of interest, all people who have financial or other interest in a supplier company, either directly or indirectly through members of their immediate families, should report such financial or other interests in writing to the Secretary Treasurer who will determine whether the interest is sufficient to disqualify the vendor.
9. District employees must not accept gifts or samples, either in kind or in money or in excessive entertainment, from a vendor or a potential vendor which has a value greater than \$100. Gifts or samples include any items offered to an employee or their family which have intrinsic value or are not obviously in the form of advertising. Excessive entertainment includes, but is not necessarily restricted to, transportation of other than a business nature and overnight accommodation.

Tables 1 and 2 are appended below.

Table 1 should only be utilized to procure goods, services and equipment that are not readily available through existing standing offer agreements.

TABLE 1 – Goods, Services and Equipment Procurement Process					
Amount per item or aggregate full contract terms	# of Quotes	Method of Quote	Method of Purchase	Procurement Process Conducted by:	Authorization level required for Purchase
Schools: <\$5,000 District: < \$15,000	1	Email, telephone, supplier website, or in-store purchase	MasterCard or supplier invoice	Budget Expenditure Authority or MasterCard holder	Must be within MasterCard transaction limit and follow rules per AP B2
Schools: \$5,000 to \$10,000 District: \$15,000 to \$75,000	2	Email and/or supplier website	MasterCard, Purchase Order, supplier invoice, or District: service agreement with terms and conditions	Budget Expenditure Authority or MasterCard holder (with assistance from Accounting Department as needed)	Principal or District Supervisor and follow rules per AP B2
Schools: \$10,000 to \$50,000	2				Secretary Treasurer or designate and follow rules per AP B2
Schools: >\$50,000 District: >\$75,000	3	Formal Process			Secretary Treasurer and follow rules per AP B2
Changes to Contract		Revise Contract by issuing: Change Order, or Amended Purchase Order or Amended Service Agreement or Contract			Schools: up to \$10,000 Schools: >\$10,000 District: up to \$75,000 District: >\$75,000 School Principal Secretary Treasurer District Supervisor Secretary Treasurer

Table 2 should only be utilized for construction procurement.

TABLE 2 – Construction Procurement Process					
Amount per item or aggregate full contract terms	# of Quotes	Method of Quote	Method of Purchase	Procurement Process Conducted by:	Authorization level required for Purchase
< \$75,000	2	Email, supplier website request for quote, direct invite or public competition	Purchase Order, supplier invoice, or service agreement with terms and conditions	Budget Expenditure Authority (with assistance from Accounting Department as needed)	District Supervisor
\$75,000 to \$200,000	2	Email, supplier website request for quote, direct invite or public competition	Purchase Order, supplier invoice, or service agreement with terms and conditions	Budget Expenditure Authority with assistance from Accounting Department	Director of Operations and/or Secretary Treasurer
>\$200,000		Formal Process (per AP B4 Purchasing and Tendering)		Up to \$1M	Secretary Treasurer
				\$1M to \$7.5M	Secretary Treasurer in consultation with Superintendent
				>\$7.5M	Secretary Treasurer with Board approval
Changes to Contract		Revise Contract by issuing: Change Order, or Amended Purchase Order or Amended Service Agreement or Contract	Appropriate Budget Signing Authority can approve changes to the contract up to 15% increase within their signing authority limit	Up to 15% of original Up to \$300,000 Up to \$1M	appropriate signing authority Director of Operations Secretary Treasurer

For the purpose of this Administrative Practice and Table 2, the term “construction” means: a construction, reconstruction, demolition, repair or renovation of a building, structure or other civil engineering or architectural work and includes site preparation, excavation, drilling, seismic investigation, the supply of products and materials, the supply of equipment and machinery if they are included in and incidental to the construction, and the installation and repair of fixtures of a building, structure or other civil engineering or architectural work, but does not include professional consulting services related to the construction contract unless they are included in the procurement. (source: New West Partnership Trade Agreement)