3301: PURCHASING (AP)

Approved: 94 06 07
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PURPOSE

This procedure establishes a clear, transparent, and accountable framework for the acquisition of goods and services. School District 70 (Pacific Rim) is committed to responsible stewardship of public funds by ensuring a fair, ethical, and sustainable procurement process that aligns with best financial practices, sustainability goals and reconciliation efforts.

SCOPE

This procedure applies to all school district employees responsible for procurement, including contracts, supplies, equipment, and services. It does not apply to expenditures covered by other policies or regulations such as travel reimbursements or emergency expenses.

1.0 PURCHASING GENERAL

1.1 Purchasing Authority

Purchasing is authorized only to procure goods or services which have been approved in the annual operating or capital budgets. Variations from budgets must be authorized by the Secretary Treasurer.

1.2 Purchasing Decisions

All purchasing decisions must be documented and conducted to uphold public trust, ensuring transparency and accountability. Procurement decisions must prioritize price, quality, and service to maximize value for money.

1.3 Purchasing Regulations

All purchases must comply with applicable laws, Board policies, and financial regulations. Employees must avoid conflicts of interest and act with integrity in all procurement activities. Where possible, preference will be given to suppliers that reduce environmental impact and support reconciliation efforts.

1.4 Sustainable and Ethical Purchasing

1.4.1 Sustainable Purchasing

School District 70 (Pacific Rim) aims to procure goods and services in a manner that supports sustainability, reconciliation, and ethical practices. Whenever possible, and without significant additional costs, the district will prioritize office products with recognized green certifications, minimal and recyclable packaging, and local suppliers to support the regional economy.

1.4.2 Ethical Purchasing

Vendors with social impact initiatives, such as hiring from disadvantaged groups, will also be given preference.

1.4.3 Equipment Lease

When appropriate leasing equipment for temporary needs is encouraged over purchasing.

1.4.4 Sustainable Purchases

The district will collaborate with suppliers to address sustainability concerns, including carbon footprint reduction. When issuing a Request for Proposal (RFP), evaluation criteria should include a sustainability component, and suppliers must comply with labour, health and safety, and environmental laws.

2.0 PURCHASING GUIDELINES

2.1 Use of School District Resources

Purchases made on behalf of School District 70 (Pacific Rim), including the use of district purchasing cards and documents, are strictly limited to acquiring goods and services required for District business purposes. All purchasers must follow this procedure to ensure compliance, transparency, and fiscal responsibility.

2.2 Purchasing Methods

The following **purchasing tools** are available:

Method	Usage
Petty Cash	Purchases ≤ $100 (requires receipt & supervisor approval)
School Trust/Bank Account	School-generated funds (requires two signatures)
Purchasing Cards	Used within set limits, requires monthly reconciliation
Cheque Requisitions	For non-PO expenses (e.g., memberships, dues)
Purchase Orders (POs)	Required for all purchases **over $2,000**
Standing Purchase Orders	For ongoing vendor relationships
District Contracts	Fixed-term agreements for recurring goods/services

2.3 Purchase Orders

2.3.1 Purchases over $2,000.00 must be submitted to the Controller along with the quote for approval.

2.3.2 Bulk Purchases are encouraged to take advantage of volume discounts.

2.3.3 Purchase orders are not needed for the purchase of utilities such as natural gas, water, telephone or garbage disposal.

3.0 APPROVAL PROCESS & PURCHASING THRESHOLDS

3.1 Purchasing Approvals

All purchases and financial commitments must be processed through the Finance Department using an approved procurement method. Employees of School District 70 (Pacific Rim) are not to commit the

District for payments of goods and services and may not sign rental agreements, leases, or agreements with vendors except when specifically approved to do so.

Threshold	Procurement Method	Purchase Order Required?	Guidance
$2,000 or less	Sole Source	No	Finance Department Discretion
$2,001 - $10,000	Two verbal/online quotes	Yes	Must consult at least two sources
$10,001 - $75,000	Minimum three written quotations	Yes	Must obtain at least three written quotations from qualified suppliers.
Over $75,001	Request for Tender or RFP	Yes	Must obtain quotes from qualified suppliers
Construction up to $200,000	Three written quotations	Yes	Must obtain at least three quotes
Construction over $200,000	Request for Tender or RFP	Yes	Public tendering via BC Bid required

3.2 Additional Approvals:

3.2.1 All IT-related purchases (hardware/software) require approval from the IT Department.

3.2.2 All Maintenance, Custodian or Project related purchases require approval from the Operations Department.

3.2.3 All purchases using the Indigenous Education Fund are restricted and require prior approval from the Director of Indigenous Education.

3.2.4 All photocopier purchases must be approved by the Finance Department.

3.2.5 Reimbursements require a Cheque Requisition Form with original receipts.

3.2.6 Employees must not submit receipts that include both school district purchases and personal items for reimbursement. All receipts submitted for reimbursement must be for school district-related purchases only. Including personal purchases on a receipt creates accounting challenges and may result in delayed or denied reimbursement. To ensure accurate processing, please make separate transactions for personal and district-related items.

4.0 SOLE SOURCE PURCHASING

4.1 Sole Source Purchasing

Sole-source purchasing is a procurement method where a contract is awarded to a single supplier without a competitive bidding process. This typically happens when only one vendor is capable of providing the required goods or services due to the uniqueness of the supplier, urgency or a lack of competition.

Sole-source purchasing is only permitted in exceptional cases and requires approval from the Secretary Treasurer, Superintendent, or designated authority.

4.2 Documentation

When a sole-source purchase is made, it must be properly documented, and the purchase order should include the justification for the sole-sourcing decision, with relevant supporting documentation retained for review.

4.3 Sole Sourcing Considerations

Such cases may include emergency situations, the necessity of maintaining warranty or system compatibility, the unavailability of competition, or when collaborative purchasing agreements with other public sector organizations provide favourable pricing.

5.0 REQUEST FOR QUOTES & PUBLIC TENDERS

5.1 Verbal Quotes

For purchases that require more than just a basic vendor selection process, verbal quotes should be obtained from at least two suppliers, with the Finance Department documenting the details.

5.2 Written Quotes

For written quotes, at least three suppliers should be invited to bid on purchases exceeding $10,000. Public tenders must be utilized for purchases over $75,000, and these tenders must be made available through BC Bid or a similar public platform.

5.3 Public Tender

The Finance Department plays a key role in ensuring that the procurement process remains competitive and transparent, and it assists departments with drafting specifications, establishing evaluation criteria, and facilitating the RFP process as needed.

5.4 Competitive Bids and Tendering

The Finance Department is responsible for ensuring that procurement processes remain fair, competitive, and transparent.

Purchase Amount	Approval Process
Up to $1,000	Comparative selections or prior supplier usage.
$1,000 - $10,000	Selection based on lowest bid from tenders, invited quotations, or direct negotiation.
$10,000 - $75,000	Written quotations from multiple reputable suppliers.

6.0 RESPONSIBLE PURCHASING STANDARDS

6.1 Purchasing responsibilities

All authorized employees must ensure that fair consideration is given to all responsible bidders during the procurement process.

6.2 Prohibited Gifts and Benefits

Employees are required to decline any gifts or benefits that could influence purchasing decisions, maintaining impartiality in all transactions. They must also avoid soliciting funds or materials from vendors, as well as refraining from requesting special personal discounts from district suppliers, to prevent any conflicts of interest and uphold the integrity of the purchasing process.

7.0 SUPPLIER CONSIDERATION

7.1 Supplier Evaluation

When evaluating suppliers, School District 70 (Pacific Rim) will consider a variety of factors, including price and quality, the ability to meet specifications, as well as service, warranty, and past performance. In addition, School District 70 (Pacific Rim) will take into account the sustainability practices of the supplier and their social impact.

7.2 Long Term Partnerships

School District 70 (Pacific Rim) aims to establish long-term partnerships with ethical and responsible vendors, all while maintaining fiscal responsibility and ensuring the best value for the community.

8.0 REAL PROPERTY PROCUREMENT & DISPOSAL

The Secretary Treasurer is responsible for managing the purchase and disposal of land and real property on behalf of the School District. This includes overseeing tendering procedures for real property transactions, including construction projects, and ensuring the proper legal contracts are in place for such transactions.

9.0 COMPLIANCE & REVIEW

The Finance Department is responsible for monitoring compliance and investigating any exceptions or irregularities. Unauthorized purchases for personal use using PACIFIC RIM SCHOOL DISTRICT 70 resources are strictly prohibited; if such purchases occur, the employee must reimburse the full amount, and the matter will be referred to a supervisor for review. Repeated or significant non-compliance will be reviewed with the employee and their supervisor and may be escalated to Human Resources if a pattern of non-compliance is identified.

9.1 Compliance

School District 70 (Pacific Rim) also requires that all purchasing activities be documented to promote accountability, and employees must be transparent and follow the established steps to maintain fairness in the process.

9.2 Periodic Audits

The Finance Department is tasked with conducting periodic audits to ensure adherence to the purchasing procedures in this document.

9.3 Non-compliance

Any instances of non-compliance will be reviewed, and corrective actions may include mandatory procurement training, escalation to the Secretary Treasurer in the case of repeated violations, and other disciplinary measures as necessary, depending on the severity of the non-compliance.

RESOURCES AND REFERENCES

Nanaimo Ladysmith Public Schools Admin Procedure 513
Cowichan Valley School District Administrative Procedure 515
Pacific Rim School District XXXX: Secretary Treasurer (AP)
Pacific Rim School District XXXX: Purchasing Card (AP)
Pacific Rim School District XXXX: Purchasing (AP)
Pacific Rim School District 330: Disposal of District Property or Facilities (P)
Pacific Rim School District 331: Disposal of Surplus or Obsolete Equipment (P)