



DISTRICT PRACTICE 3700

PROCUREMENT AND PURCHASING

DISTRICT PRACTICE:

1. General Purchasing Practices

- a) All expenses are required to be approved before the School District is committed to the purchase. It is the employee's responsibility to ensure the policies and district practices have been followed in order for the payment to be processed to the vendor or employee to be reimbursed. Purchasing practices should be shared with all staff and reviewed each year.
- b) Furniture and office purchases must meet certain minimum standards for fire code and health and safety requirements. Consultation and coordination with the Operations Department is required to ensure optimal pricing and quality.
- c) Technology purchases shall be completed through a purchasing request in the service ticketing system in Asset Planner using the purchasing function.
- d) The majority of purchases are to be planned as part of the yearly budget planning process.
- e) Purchases in excess of \$500 should not be completed personally with the exception of preapproved travel expenses.
- f) Registrations in professional conferences should be completed with a School District credit card.
- g) Purchases for supplies, Special Purpose Funds, and learning resources should be made in the first part of the year to ensure the opportunity for use by students in the school year.
- h) Purchases must be carefully reviewed to ensure coding to the appropriate account.
- i) A supported practice is to review account details once per calendar month. Examine account trends and be aware of anomalies at each point of the year.
- j) Cash or near cash gifts and awards such as gift certificates/cards are considered a taxable employment benefit. The School District does not support employees to be compensated using this method.

2. Authorization Limits for Expenditures

- a) Assistant Superintendent, principals, managers, directors and supervisors with signing authority on department budgets are authorized to sign purchase orders up to \$5,000 within the respective annual budget allocation.
- b) Purchases greater than \$5,000 but less than \$100,000, require the additional authorization of the Secretary Treasurer or designate.
- c) Purchases equal to or greater than \$100,000, and/or any service or maintenance agreement that is for a period of more than 12 months, unless included specifically in the approved operating or capital budget, require the authorization of the Superintendent.



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3. Procedures

- a) Purchase orders represent the contractual obligation between the School District and the supplier. The purchase order protects the School District and the supplier to the agreed quantity, price, description, and delivery arrangements.
- b) Check existing inventories in our area and other schools prior to buying new.
- c) Verify whether the item can be repaired at a reasonable cost.
- d) Encourage price comparisons for all purchasing.
- e) A purchase estimated to exceed \$10,000 must receive price quotations from three (3) suppliers unless there are fewer than three (3) suppliers for the goods or services.
- f) A purchase estimated to exceed \$10,000 will require invited or advertised written price quotations from three (3) suppliers. Tenders shall be placed in one or more of the following media:
 - i. local newspapers;
 - ii. regional newspapers;
 - iii. provincial newspapers;
 - iv. trade journals; or
 - v. BC Bid website
- g) The Superintendent or Secretary Treasurer will determine, in accordance with this district practice, if it is reasonable to call for written quotations. The School District participates in [Focused Education Resources](#) program; this is the primary initial source for recommendations.
- h) The individual responsible for the purchasing decision must ensure that suppliers located within the School District boundaries are asked to bid on the supplies and/or materials to be purchased.

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ADOPTED: December 13, 2022

Amended:



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4. Receipt of Tenders

- a) Sealed tenders are to be received and not opened until the date and time specified on the tender.
- b) All tender envelopes shall be stamped or hand-written, showing the date and the time of receipt.
- c) Tender documents are then to be delivered directly to the Director of Operations or designate.
- d) Tenders received are to be secured in the vault or safe or other secure area until the closing date.
- e) Any variance or irregularities contrary to the above procedure shall be communicated directly and immediately to the Secretary Treasurer.

5. Use of School District Forms

- a) Operations Supply Order Form
 - i. All Operations staff require a supply order form for all purchases under \$5,000.
 - ii. All supply order forms require information in the fields of the form and a requisition number from supervisor.
 - iii. All supply order forms require approval from the supervisor.
- b) School District Credit Cards
 - i. Credit cards may be used for purchases within the schools or department.
 - ii. Credit cards must be reconciled to all receipts by the cardholder each month.
 - iii. The care and storage of the card is the responsibility of the cardholder, and the cardholder is responsible for all purchases.
 - iv. Receipts submitted to the cardholder should have sufficient detail (department and purpose) for the cardholder to justify the educational nature of the purchase.
 - v. The reconciliation report cover page is required to summarize the receipts and totals shall match the statement. The report is required to be signed by the cardholder.



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- c) Cheque Requisition
 - i. Cheque requisitions require information in all fields of the form, including an accurate description of the purpose for the invoice attached (for example, Science Department – baking soda for class observation).
 - ii. Cheque requisitions require an invoice or receipt to be attached.
 - iii. Cheque requisitions require approval from the supervisor/principal.
 - iv. Account codes should be reviewed for accuracy prior to submission.
 - v. One purchase item per requisition unless submission is for a petty cash reimbursement.

- d) Petty Cash - miscellaneous office items such as stamps, postage, office supplies
 - i. A petty cash amount of \$300 will be maintained at the beginning of the month at each site.
 - ii. A cheque requisition should be completed at the end of each month to reconcile the reimbursements for the month to replenish the balance.
 - iii. In the event the petty cash is depleted prior to month end, a requisition shall be submitted to reconcile and replenish the balance.
 - iv. All receipts are required to be attached to the Cheque Requisition cover sheet.
 - v. Staff will submit receipts for reimbursement in the month during which the expense was incurred.
 - vi. June receipts shall be submitted prior to June 15th for all reimbursements. Receipts submitted after this date will not be processed until September.

- e) Travel and mileage electronic workbook form - claim for mileage between school and other related business travel, e.g. workshops.
 - i. Expense claims are to be completed using the electronic workbook form [Form 3800] which is accessible on the School District website.
 - ii. Expense claims should be submitted as soon as reasonably possible and preferably in the month during which the expense was incurred.
 - iii. Travel expenses are determined from the employee's work location for the day which the respective expenses were incurred.

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