

Administrative Procedures 515 Purchasing

Adopted: June 28, 2011

Amended: January 26, 2026



External References:

- Education Act: Sections 69, 85, 87, 109, 110, 344, 349, 352, 354, 355
- Annex 502.4 Agreement on Internal Trade

Internal References:

- AP 515 Purchasing – Appendix A – Purchase Orders
- AP 515 Purchasing – Appendix B – Facilities Purchasing
- AP 515 Purchasing – Appendix C – Facility Tenders and Contracts
- AP 515 Purchasing – Appendix D – Transportation Purchasing
- Form 515-1 Purchase Order
- Form 515-2 Colony Caretaking Supplies Request
- Form 530-1 Purchaser's Waiver Agreement

Background

Purchases of materials, supplies and equipment are to be made in accordance with principles and procedures designed to acquire best value for the Division.

Definitions

Formal Tender – A process requiring the tender to be advertised in the local media and the tender opening to be made publicly. Tenders are to be date-stamped on receipt and, if sealed, must remain sealed until the public opening. For tendering of greater than one hundred thousand (\$100,000) dollars, advertising may occur nationally.

Request for Proposal – A formal process for obtaining offers from competing organizations and evaluating those proposals against stated requirements, using a predefined evaluation process and a predefined set of evaluation criteria in which price is not the only factor.

Written Quotation – A process requiring selected vendors to submit written quotations, not required to be opened publicly.

Purchase Order – A legal contract between the Division and a vendor that gives the vendor authority to ship and charge for the goods specified in the order.

Standing Order – A contract that provides for a vendor to supply specified products or services for a specified period of time with actual requirements to be determined, requested, and delivered when and as required.

Procedures

1. Processing Purchases

1.1 Formal tendering is required when:

- 1.1.1 The Director or designate deems it to be in the best interests of the Division.
- 1.1.2 It is a requirement of The Education Act.
- 1.1.3 It is a requirement of the New West Partnership Trade Agreement for goods, services and construction.

- 1.2 A formal request for proposal process is used when the purchase is not solely a product or commodity, but is more in the nature of a solution to a problem or need where the solutions are expected to be quite varied and/or difficult to evaluate or cost is not the only selection criterion.
- 1.3 A minimum of three (3) written quotations are to be requested when:
 - 1.3.1 The value of the item is expected to be between five thousand (\$5,000) and seventy-five thousand (\$75,000) dollars.
 - 1.3.2 The Director or designate deems it to be in the best interests of the Division.
- 1.4 Goods and services up to an aggregate cost of five thousand dollars (\$5,000) may be purchased directly by budget managers utilizing a local purchase order. Goods and services obtained through the formal tender process are excluded from this authority.
- 1.5 It is expected that all requirements for goods and services purchased through the formal tender process will be ordered by the schools and the Division Office at the time of the formal tender.
- 1.6 The lists of goods and services to be obtained through the formal tender process is to be subject to an annual review to determine items of inferior quality and/or items to be added or deleted.
- 1.7 The Superintendent of Business has the lead responsibility for conducting formal tenders.
- 1.8 In those cases where the tender or quotation process is utilized, consideration is to be given to process, quality, and the supplier's reputation, as evidenced by previous performance and service.
- 1.9 Where no competitive supply market exists, or it is considered in the best interests of the Division, purchasing practices are to employ such value analysis and negotiation methods considered appropriate for obtaining acceptable materials at the lowest possible price.
- 1.10 All goods and services purchased are to be obtained through the use of an approved purchase order with the exception of small goods and services purchased by means of petty cash funds.
- 1.11 Purchasing processes, forms and services are to be utilized only for authorized Division business.
- 1.12 No Division employee utilizing purchasing processes is to accept any gift or benefit, whether in the form of goods, services, loans, or favours, from any individual, organization, or corporation which is interested directly or indirectly in dealings with the Division, subject to normal exchange or hospitality between persons doing business together.

2. Responsibilities and Authorities

- 2.1 The Board is responsible for the award of tenders for capital expenditures for:
 - 2.1.1 Motor vehicles, furniture and fixtures, equipment and educational materials and supplies exceeding seventy-five thousand dollars (\$75,000);
 - 2.1.2 Capital expenditures for building materials exceeding seventy-five thousand dollars (\$75,000);
 - 2.1.3 Contracts for other capital works exceeding two hundred thousand dollars (\$200,000); and
 - 2.1.4 Transportation services exceeding seventy-five thousand dollars (\$75,000).
- 2.2 The Superintendent of Business is responsible for purchasing practices and procedures.

- 2.3 The Superintendent of Business has the authority to revise requisitions according to established standards, provided such revisions are discussed with the requestor.
- 2.4 Purchases may be authorized only by budget managers in the person of the Director, Superintendents, Supervisors, Principals, or designate(s).

Administrative Procedures 515 - Appendix A Purchase Orders

Adopted: June 28, 2011

Amended: January 26, 2026

External References:

- Education Act: Sections 69, 85, 87, 109, 110, 344, 349, 352, 354, 355
- Annex 502.4 Agreement on Internal Trade

Internal References:

- AP 515 Purchasing
- AP 515 Purchasing – Appendix B – Facilities Purchasing
- AP 515 Purchasing – Appendix C – Facility Tenders and Contracts
- AP 515 Purchasing – Appendix D – Transportation Purchasing
- Form 515-1 Purchase Order

Schools

1. Purchase order numbers will be issued on each purchase order. The purchase order number will be three (3) letters and a number i.e. Beechy School (BEE-001) sequentially.
2. The purchase order will include the name, address and email address of the supplier to avoid delays.
3. The Principal will sign the purchase order email to purchase.order@sunwestsd.ca.
4. Once the Division receives the purchase order, the Business Supervisor or Business Manager will sign the order and then it will be sent to the vendor.
5. When orders are received by the school, an email will be sent to the purchase.order@sunwestsd.ca email address or to the Accounting Clerk. This will verify that all items have been received and the accounting department is able to process payment for the invoice.
6. If there are problems with the order, the school will contact the vendor and the Principal or designate will notify the Accounting Clerk their has been an issue with the order.
7. Caretakers are to refer to Administrative Procedures 515 Purchasing – Appendix B – Facilities Purchasing.
8. For Facilities Department purchases refer to Administrative Procedures 515 Purchasing – Appendix B – Facilities Purchasing.
9. For Transportation Department purchases refer to Administrative Procedures 515 Purchasing – Appendix C – Transportation Purchasing.

Division Office

1. Supervisors, Superintendents and the Executive Assistant will approve purchase order requests submitted by Division employees.

2. The purchase order number will be a letter or combination of letters and a number, for example: Maintenance (M-001); Busing (B-004) sequentially.
3. The purchase order will include the name, address and email address of the supplier to avoid delays.
4. Purchase orders will be given to the Accounting Clerk for ordering.
5. to the Accounting Department will be notified once the supplies have been received, giving the Accounting Department authorization to pay.
6. If there are problems with the order, the recipient of the order will contact the vendor. The problem will be reported to-the Accounting Department.

Administrative Procedures 515 - Appendix B Facilities Purchasing

Adopted: June 28, 2011

Amended: January 26, 2026

External References:

- Education Act: Sections 69, 85, 87, 109, 110, 344, 349, 352, 354, 355
- Annex 502.4 Agreement on Internal Trade

Internal References:

- AP 515 Purchasing
- AP 515 Purchasing – Appendix A – Purchase Orders
- AP 515 Purchasing – Appendix C – Facility Tenders and Contracts
- Form 515-1 Purchase Order
- Form 515-2 Colony Caretaking Supplies Request

School Caretaking Supplies

The following is the sequence of events for ordering **school caretaking** supplies:

1. Monthly the head caretaker or designate checks their school inventory of supplies and completes an order form that is sent to the Facilities Supervisor as an attachment to “Asset Planner” service request.
2. The Facilities Supervisor will review the order and attach a purchase order number to the service request before assigning it to the supplier.
3. When the supplies are delivered the caretaker will indicate the delivery by attaching a note to the service request.
4. Purchases from local suppliers of less than \$500 do not require a purchase order, but the original receipt must be sent in to the Division Office and must include a caretaker signature and the name of the school.
5. When local contractors are hired to perform services an email to the Facilities Supervisor is essential for invoice payment. With the exception of grounds keeping and snow removal, contractors working at the school are to be organized by the Maintenance Coordinator unless it is an urgent situation.

Colony School Caretaking Supplies

The following is the sequence of events for ordering **colony school caretaking** supplies:

1. Form 515-2 Colony Caretaking Supplies Request is dedicated to colony caretaking supplies.
2. As necessary this form can be filled out itemizing requirements and faxed or emailed to the Facilities supervisor.
3. The Facilities Supervisor will generate an “Asset Planner” Service request with a purchase order number and assign it to the vendor.
4. Supplies are delivered to the Division office and transported to the colony as quickly as possible.

Maintenance Supplies and Contracted Services

The following is the sequence of events for ordering **maintenance** supplies and contracted services:

1. As necessary, Maintenance Coordinators may generate purchase orders for supplies and services. The format should be their initials and three digits i.e. DT-001 and so forth sequentially.
2. Copies of these purchase orders must be sent to the Facilities Supervisor.
3. Local purchases less than \$1,000 do not require a purchase order but the original receipt must be sent to the Division office and must include the Maintenance Coordinator signature and the name of the school receiving the goods.
4. Local contractors do not need a purchase order unless the repair or service is expected to exceed \$5,000.
5. Maintenance Coordinators must generate a purchase order when supplies or contracting are not local.
6. Packing slips must be sent to the Division Office.
7. Purchases in excess of \$5,000 must be made by the Facilities Manager or Facilities Supervisor.

Administrative Procedures 515 - Appendix C Facility Tenders and Contracts

Adopted: June 28, 2011

Amended: January 26, 2026

External References:

- Education Act: Sections 69, 85, 87, 109, 110, 344, 349, 352, 354, 355
- Annex 502.4 Agreement on Internal Trade

Internal References:

- AP 515 Purchasing
- AP 515 Purchasing – Appendix A – Purchase Orders
- AP 515 Purchasing – Appendix B – Facilities Purchasing

The Division requires contractors and trades people to assist with facility repairs. Projects are tendered before awarding contracts. The Division website provides information regarding current projects.

School Divisions have four categories to which work is assigned. Each category has a different process that enables us to find and assign work.

1. **Category #1** is minor or incidental repair work. These jobs are less than \$20,000 and do not require special detail or professional assistance to define. This is the majority of work to maintain Division buildings. These jobs are initiated by caretakers and Principals at schools by entering requests into the AMERESCO AssetPlanner website (the Division online request system (i.e. blocked toilet or burned out light ballast). These jobs are assigned to one of our four Maintenance Coordinators who then contact contractors directly to make these repairs. The goal is for the quickest and most cost effective repair with minimal impact to the operation of the school. We try where possible to get local trades people however if they are unavailable we may go outside the immediate community to resolve issues as quickly as possible.
2. **Category #2** describes projects that fall between \$20,000 and \$300,000. These projects are of a size that competitive quotations or price requests are sought. Optimally we would like three quotations to compare pricing however we often don't get as many responses as we would like. These projects will be listed on our website and we may advertise in newspapers and with the construction association to get the most exposure. Projects of a larger size may involve performance contracts and appropriate permits.
3. **Category #3** describes projects between \$300,000 and \$1,000,000. These projects are sent to the Ministry of Education for approval and possible "Block" funding. These projects always involve architects and engineers to create tender documents including specifications and insure compliance with all building codes and legislation. Typically these projects take between 6 and 18 months to plan and complete.
4. **Category #4** describes major capital projects exceeding \$1,000,000. Similar to Category #3 these projects have major involvement with the Ministry of Education but the size of the project creates deeper issues for planning and budgeting. These projects typically take between 12 and 36 months to plan and complete.

Administrative Procedures 515 - Appendix D Transportation Purchasing

Adopted: June 28, 2011

Amended: January 26, 2026

External References:

- Education Act: Sections 69, 85, 87, 109, 110, 344, 349, 352, 354, 355
- Annex 502.4 Agreement on Internal Trade

Internal References:

- AP 515 Purchasing
- AP 515 Purchasing – Appendix A – Purchase Orders
- AP 515 Purchasing – Appendix D – Transportation Purchasing
- Form 515-1 Purchase Order

Bus Garage Purchases

1. Mechanics will order bus parts as required to maintain a suitable level of inventory. Purchases exceeding \$2,000.00 require approval from the Transportation Manager or Transportation Supervisor.
2. For purchases of specialty tools and shop supplies/equipment over \$500.00, mechanics will contact the Transportation Manager or Transportation Supervisor for approval.
3. The vendor will be asked to include the mechanic's name on the invoice/packing slip for all purchases.
4. Purchases over \$5,000.00 will require a purchase order completed by the Transportation Supervisor or designate.
5. Parts that can be ordered in large quantities will be ordered by the Transportation Supervisor.