

**CODE:** CW.AR**EFFECTIVE DATE:** (09-02-2012)**TOPIC:** Purchasing and Disposal**ISSUE DATE:** (17-09-2014)**REVIEW YEAR:** (2017)

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**REGULATION****A. GENERAL**

1. All items purchased in the name of a school or the Board shall become the property of the Edmonton School District No. 7.
2. All purchases by Parent Advisory Groups which are donations to the District become the property of Edmonton Public Schools. All such donations must be accompanied by a signed transfer of title (DDBB.AR - Community Purchase of Supplies and Equipment).
3. In considering vendors' performance, consideration shall be given to:
  - a. reputation and experience
  - b. the ability to deliver or perform within the time specified
  - c. the ability to provide after sales' maintenance and service
  - d. past experience on previous orders.
4. In considering pre-qualification of vendors, the following criteria must be met. Individuals or vendors not complying with the following should contact Human Resources:
  - a. current business license
  - b. minimum of 2.0 million dollars Liability Insurance
  - c. W.C.B. coverage (where applicable)
  - d. employees of the District who wish to be treated as a vendor and enter into a contract with the District other than that of employment must comply with the above pre-qualification requirements as well as the following requirements:
    - i. provide a detailed overview on the type of product or service to be provided.
    - ii. submit requested information to the Superintendent of Schools for review and approval.

**B. LIMITATIONS ON DIRECT PURCHASES**

1. All purchases of supplies, equipment and services with a cost in excess of \$1000 per order must be made through Purchasing and Contract Services. Purchasing forms and procedures are set out on the Purchasing and Contract Services website.
2. Requests for quotations/proposals shall allow for appropriate timelines for processing, response and scheduling:
  - a. Emergency or unforeseen circumstances will be considered on a case-by-case basis.
  - b. Quotations/proposals for services originated at schools must be received at a predetermined location, with a stipulated closing time and date, and should indicate the opening time and date (refer to Clause C.4).

3. All purchases of services of the type ordinarily performed by district maintenance staff shall be in accordance with the requirements of the Maintenance Collective Agreement.

Quotations for such services shall be based on a written description of the scope of work and specifications appropriate for the complexity of the work.

Only vendors pre-qualified by Purchasing and Contract Services shall be allowed to bid.

4. Purchasing and Contract Services will abide by provincial and federal legislation as outlined in the Agreement on Internal Trade (AIT) as well as the New West Partnership Trade Agreement (NWPTA), and the Alberta Trade Investment and Labour Mobility Agreement (TILMA). Purchasing and Contract Services will abide by the following thresholds:
  - \$75,000 or greater for goods
  - \$75,000 or greater for services
  - \$200,000 or greater for construction
5. The District credit card may be used to make purchases on behalf of the District. Transaction limits are set as \$1,000 per purchase and \$3,000 per month. Transaction limits may be increased for travel and professional development and other types of purchases at PCS discretion by submitting an Increase Limit Form to Purchasing and Contract Services. Limits may be increased for other purchases at the discretion of Purchasing and Contract Services and the approval of the Treasurer.

### C. PROCEDURES FOR HIGHER COST PURCHASES

1. Purchasing and Contract Services is authorized to purchase goods or services having an aggregate value of:
  - a. up to \$5,000 without obtaining quotations.
  - b. up to \$15,000 after receiving verbal quotations from at least three suppliers.
  - c. \$15,000 or more based on written quotations/proposals. Written quotations/proposals shall be solicited by invitation, newspaper advertisement and/or electronic bidding system.
2. Requisitions submitted for supplies, equipment or services where the total cost will exceed \$15,000 will require the approval of an Assistant Superintendent prior to calling for bids.
3. All specifications shall be provided or revised as necessary by the user department in consultation with Purchasing and Contract Services.
4. All quotation/proposal envelopes, except those dealing with insurance, employee fringe benefit contracts, and legal services, are to be received by Purchasing and Contract Services. Exceptions are to be directed to the location identified in the tender or quotation/proposal. Any quotation/proposal arriving after the closing date and time will be rejected.

Quotations/Proposals received after the closing date and time by mail will be marked "Late Quotation/Proposal" and returned to the bidder.

5. The opening of quotations/proposals originated by Purchasing and Contract Services shall take place immediately after the closing time and shall be attended by a procurement agent/officer/manager and a minimum of one other Purchasing and Contract Services representative. Results pertaining to the quotations may be provided to participating vendors during the opening of the quotation. Information pertaining to proposals will not be released until the review process has been completed and the successful vendor(s) have been identified.
6. The opening of construction tenders shall take place immediately after the closing time and shall be attended by a Purchasing and Contract Services representative and a minimum of one other person from either Purchasing and Contract Services or the user department.
7. Selections shall be made by a representative of the user department in consultation with Purchasing and Contract Services.
8. Where Purchasing and Contract Services believes that a bid, which meets the specifications for a purchase (other than lowest bid), should be accepted, the approval of the Superintendent of Schools shall be obtained prior to making the award. The Superintendent of Schools may request the prior approval of the Board.
9. All quotations/proposals and related documents shall be available for review for a period up to one year after an award has been made.
10. Purchasing and Contract Services may negotiate the purchase of used furniture or equipment without obtaining quotations.

#### D. DISPOSAL OF SURPLUS ITEMS

1. Purchasing and Contract Services shall arrange disposal of surplus supplies, furniture or equipment and the subsequent transfer of credit within the District.
2.
  - a. Schools and decision units who wish to dispose of supplies, furniture, or equipment surplus to their own requirements shall notify Purchasing and Contract Services, and provide a detailed list of the surplus items.
  - b. Purchasing and Contract Services shall dispose of declared surpluses by:
    - i. advertising declared surpluses throughout the District on behalf of schools or decision units; or
    - ii. externally, for items having a value of less than \$5,000.
      - by holding a public sale which shall be advertised in a local newspaper; or
      - by inviting sealed bids for specific items; or
      - post on Alberta Purchasing Connection (APC); or
      - by public auction with or without a reserve bid; and, or
      - the following process:
        - advertising online under Surplus Assets

- advertising to other non-profit organizations
- advertising to the general public and staff using the Internet C-Port
- by trade-ins on new purchases.

Note: Any other method of disposal requires the prior approval of the Superintendent of Schools.

- in accordance with the *School Act* and related regulations for items having a value of \$5,000 or more.

#### E. DISPOSAL OF COMPUTERS

1. In order to meet the legal requirements under the *Freedom of Information and Protection of Privacy Act (FOIP)* under Part 2, Protection of Privacy Division 1, Collection of Personal Information Section 38, Protection of Personal Information, Purchasing and Contract Services (PCS) require any computer device, which retains any type of student information or district operational information, rendered incapable of retrieving these records.
2. To ensure that confidential data on computers is not accidentally released, decision unit managers must take the following precautions when disposing of these computers:
  - a. Fill out, initial and sign Computer Disposal Exception Request (CDER) form and follow directions on form.
  - b. Send CDER form to Purchasing and Contract Services.
3. Upon receipt of the CDER form, Purchasing and Contract Services will contact a recycling firm to pick up surplus computers.

#### REFERENCES

CO.BP – Fiscal Oversight and Accountability  
 DDBB.AR - Community Purchase of Supplies and Equipment  
 ELA.AR - School Consolidation: Equipment Disposal  
 EPSB – Surplus Assets  
*School Act* Section 200  
*Freedom of Information and Protection of Privacy Act*