

## **PURCHASING AUTHORITY**

### **Background**

Consistent with good purchasing practices, purchasing will be competitive and seek maximum educational value for every dollar expended.

Under the Division's distributed decision making model, site administrators are given authority to make decisions to achieve objectives of their site. The model is based on the belief that those who are closest to the activity, which have the greatest knowledge and expertise of that activity, must make the decision on how to achieve the goals and objectives for that activity.

### **Procedures**

1. When possible, purchases are to be done through the Visa Purchasing Card program. Expenditures that are not eligible for the Visa Purchasing Card program are to be made by following the procedures in Table 1.
2. Itemized supporting documentation (i.e. invoices and receipts) must be provided to Financial Services for all purchases. This documentation will be audited by Financial Services and the external auditors.
3. All purchases must be approved by the site supervisor and coded to the correct account before they are submitted to Financial Services.
4. Purchase orders must be created before ordering product and provided to the vendor under the following conditions:
  - 4.1 The method of payment is not a purchase card
  - 4.2 The value of the order exceeds \$2,000
  - 4.3 The product must be ordered in advance of receiving it.
  - 4.4 The vendor requires a purchase order
5. All interested suppliers are encouraged to quote on the requirements of the Division.
6. The Division will attempt to obtain the maximum value for each dollar expended consistent with good educational and purchasing practices. Consideration is to be given to:
  - 6.1 The supplier's reputation and experience,
  - 6.2 The ability to deliver or perform within the time specified,
  - 6.3 The ability to provide after-sales maintenance and service, and

- 6.4 Past experience on previous orders will also be considered.
7. All other factors being equal, and where permitted by the Reciprocal Trade Agreement, the Division shall purchase from local, provincial and Canadian suppliers in that order of preference.
  8. To the extent that it is reasonable and efficient, the Division supports the concept of centralized purchasing to serve the needs of various schools.
  9. Purchases of items for the personal use of employees or trustees shall not be made in the name of the Division.
  10. Rewards earned for Division purchases shall not be used for personal benefit.
  11. The Secretary-Treasurer shall be responsible for maintaining adequate insurance coverage as directed by the Board.
  12. Such legal or professional services as are required shall be obtained as directed by the Board.
  13. Schools may purchase program services from other schools. When a school is required to purchase program services from another school or department:
    - 13.1 The Principal of the school receiving the program service and the Principal of the school providing the program service will agree in writing on the cost of service.
    - 13.2 The Principal of the school purchasing the program services will budget in the transfers code an expenditure equal to the F.T.E. portion of the average teacher cost.
    - 13.3 The Principal of the school providing the program service will budget in revenue sources the F.T.E. portion of the average teacher cost.
    - 13.4 Any costs associated with transportation will be budgeted by the school purchasing the service.
    - 13.5 If there is disagreement regarding the level of budget amendment, the Superintendent will make the decision.
  14. Telephone and Fax Use
    - 14.1 Long distance calls shall be made only on official school business.
    - 14.2 Long distance calls or faxes of a personal nature shall either be collect calls, charged to the caller's home number or charged to a personal calling card.

Reference: Section 20, 60, 61, 80, 113, 116, 121 School Act  
Freedom of Information and Protection of Privacy Act  
School Buildings and Tendering Regulation 383/88  
Agreement on Internal Trade; Annex 502.4  
Trade, Investment and Labour Mobility Agreement

*Revised August, 2013*

**TABLE 1 – PURCHASING PROCEDURES**

EXPENDITURES	PROCEDURE
Vendor does not accept Purchase Card or purchase exceeds Visa limit	The vendor is to provide an invoice which is coded and then approved by the site supervisor. The invoice is then submitted to Financial Services for payment.
Capital Projects	Capital Projects, whether purchased or donated, such as playgrounds or building enhancements, must be coordinated and approved by the Director of Facility Services.
Computer, Servers and other Technological Equipment	<p>Technology is provided to schools under the Division’s Technology Leasing program. Schools shall not use budget funds to purchase computers or technological equipment.</p> <p>Computers or technological equipment that is donated to schools or purchased from School Generated Funds requires the approval of the Director of Technology Services with the understanding that schools will be responsible for the costs of installation and maintenance.</p>
Software	To meet license and IT support requirements, all software purchases must be approved by Director of Technology Services or designate.
Vehicles	Before the purchase is made, all vehicles used to transport students must be reviewed and approved by the Director of Transportation Services.
Photocopiers	Photocopiers shall be purchased from the Division’s contract with its preferred vendor.
Paper	Paper shall be purchased from the Division’s contract with its preferred vendor.
Office Supplies	It is recommended that office supplies are purchased from the Division’s contract with its preferred vendor.
Contracts for Services	All contracts for services shall be signed by the Superintendent or Secretary-Treasurer.
Expenses over \$75,000	The Division uses Alberta Purchasing Connection, the official electronic tendering system for Alberta’s public sector. APC meets Alberta’s obligations for “Transparency and Fair Acquisition Processes and Procedures for Procurement” as set out in Agreement on Internal Trade (AIT).
Expense Reimbursement	Personal reimbursement of kilometers or purchases where personal funds were required to be used shall follow AP 514 – Travel and Expense Reimbursement.