

### KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD

### ADMINISTRATIVE REGULATION

Regulation Name: Procurement Procedures Regulation Code: BA-5.1.1
Section: Business and Administrative Services Policy Code Reference: BA-5.1

Established: February 1, 1999

Revised or

Reviewed: June 17, 2004; March 30, 2010; January 24, 2012; January 16, 2023

### 1. OBJECTIVE

This administrative regulation outlines Kawartha Pine Ridge District School Board's (KPR) procedures to fulfill the co-ordination for the procurement of all goods, services, and construction as necessary for the effective operation of the Board in order to achieve the right materials, source, quantity, service, time, price and place.

Employees and the Board of Trustees involved with procurement activities are required to follow the procedures outlined herein. These procedures ensure Board resources are used in a responsible manner and are in alignment with Board Policy BA-5.1, Procurement Procedures.

## 2. **DEFINITIONS**

**Board of Trustees** 

The elected governance branch of the Board.

### Collaborative Procurement

Collaborative procurement is a coordinated event that facilitatetcirreateetc6teet pg to Dpv qfqp Date A person or entity, that under an agreement, other than an employment agreement, provides expert or strategic advice and related services for consideration and decision-making.

# **Consulting Services**

The provision of expertise or strategicadvice that is presented for consideration and decision-making.

### Contracted Vendor of Record (CVOR)

A contract established with a vendor(s), from an open competitive procurement process, for the direct acquisition of particular goods, services or construction regardless of the dollar amount.

**Procurement Procedures** 

**Regulation Code: BA** 

There will be no public openings for any bid opportunity; bid results will be posted electronically.

The Board reserves the right to cancel bid processes at any stage and issue a new bid for the same or similar deliverable, accept any bid in whole or in part or reject any or all bids.

		<b>Table 5.1.2</b>			
Consulting Services (exclusive of tax)					
Procurement Value	Process	Means of Procurement	Responsibility		

**Procurement Procedures** 

**Regulation Code: BA** 

All requests for new vendors will be reviewed by Procurement Services in order to seek opportunities for aggregation of goods, services and construction by vendor and to prevent proliferation of vendors on file.

benefit or enjoyment, except where an employee purchase plan has been approved by the Board.

Items of nominal value offered by suppliers are acceptable as long as they do not appear to impose any obligation to buy, receive, or refer on behalf of the Board or pose an ethical breach.

Gifts offered exceeding nominal value should be returned with an explanation or, if perishable, either returned or donated to a charity in the name of the supplier.

In the case of any gift received, care should be taken to evaluate the intent and perception of acceptance to ensure that it is legal, that it will not influence buying decisions and that it will not be perceived as unethical.

# **5.6** Exemptions from Competitive Process

Exemptions to procurement activities must be identified to the Manager of Procurement and Central Services prior to any purchase. Exemptions must be documented and pre-approved by the appropriate authority level for the entire cost of the purchase. Guidelines of exemptions are noted in Appendix B.

# 6. RELATED POLICIES, ADMINISTRATIVE REGULATIONS OR PROCEDURAL DOCUMENTS

### **Board Policies:**

B-1.4, Signing Officers of the Board

BA-1.1, Records Management

BA-1.8, Privacy and Information Management

BA-4.3, Petty Cash Funds

BA-4.9, Expenses and Reimbursements for Trustees (to be linked)

BA-4.10, Expenses and Reimbursements for Employees (to be linked)

BA-5.1, Procurement Procedures

BA-5.2, Disposal of Surplus or Obsolete Materials, Furniture and Equipment

BA-6.5, Surplus Board Real Estate – Disposal/Rental

BA-7.3, School Generated Funds

## Administrative Regulations:

B-4.1.1, Signing Authority and Purchasing Approvals

Other Documents (Internal):

Purchasing Policy and Regulations Guide

## 7. REFERENCE DOCUMENTS

## Legislation:

Broader Public Sector Accountability Act

<u>Canadian Free Trade Agreement (CFTA), Chapter Five – Government Procurement</u>

**Education Act** 

Comprehensive Economic and Trade Agreement (CETA), Chapter 19 – Government

Procurement

Freedom of Information and Protection of Privacy Act

### Other Documents:

Broader Public Sector Procurement Directive

## 8. APPENDICES

<u>BA-5.1.1A, Procurement Procedures – Appendix A – Competitive Procurement Processes</u>

<u>BA-5.1.1B</u>, <u>Procurement Procedures – Appendix B – Guidelines for Exemptions from Competitive Procurement Process</u>

BA-5.1.1C, Procurement Procedures – Appendix C – Bid Irregularities

BA-5.1.1D, Procurement Procedures – Appendix D – Purchasing Cards

BA-5.1.1E, Procurement Procedures – Appendix E – Vendor Suspension Protocol