

# KAWARTHA PINE RIDGE DISTRICT SCHOOL BOARD

## ADMINISTRATIVE REGULATION – APPENDIX A

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

Established: March 30, 2010  
Revised or  
Reviewed: January 24, 2012; January 16, 2023

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### **Competitive Procurement Processes**

#### **1. Types of Acquisition Processes**

All formal bid processes must be completed in a prescribed format through Procurement Services with cooperation and assistance from the end user.

##### **1.1 Direct Acquisition**

Refers to the acquisition of goods, services and construction that can be ordered directly by the end user with assistance from Procurement Services as required. A competitive process is not required.

##### **1.2 Quotations**

**1.2.1 Informal Quotation** – Refers to a written offer from one or more vendors in response to a bid request.

Informal quotations can be obtained by the end user. Assistance is available from Procurement Services.

Informal quotations may be obtained in writing by ~~fax or~~ email or by any other means of written communication. Informal quotations must be provided in a format that identifies the vendor providing the quotation,

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in the bid documents and shall not impose or consider criteria that are designed to favor particular suppliers.

**11. Establishing and Executing the Cr**



**16. Procurement Documents and Records Retention**

All procurement documents, as well as any other pertinent information for reporting and auditing purposes, must be maintained for a period of seven years and be in recoverable form if requested.

**17. Dispute Protest Procedure**

During the procurement process of goods, services and construction projects, if a vendor feels that they have been unfairly prejudiced by a decision made by the Board, they may register a complaint to the Manager of Procurement and Central Services and the following steps will be taken to resolve the complaint:

17.1 All complaints will be forwarded to the Manager of Procurement and Central Services

17.2 The Manager of Procurement and Central Services shall investigate the nature of the complaint by reviewing the information with the appropriate staff and the vendor to determine the grounds and alternatives for a resolution. The Manager of Procurement and Central Services will then attempt to resolve the dispute. Successful resolutions shall be documented in writing and sent to all parties concerned.

17.3 If the Manager of Procurement and Central Services is unable to resolve the dispute to the satisfaction of the participants, all documentation concerning the dispute will be forwarded to the Superintendent of Business and Corporate Services.

**18. Contract Management**

All Board-related acquisitions must be managed responsibly and effectively. Payments must be made in accordance with receipt of product and/or with provisions of contracts. Any overpayments must be recovered in a timely manner. Supplier performance must be managed and documented as per Appendix E.

For services, clear terms of reference for the assignment must be established including objectives, background, scope, constraints, staff responsibilities, tangible deliverables, timing, progress reporting, approval requirements and knowledge transfer requirements. Expense claims and reimbursement must be explicitly provided for in the contract for services. Reimbursement for allowable expenses can be claimed and reimbursed only when the contract specifically provides for it.

Under no circumstances can hospitality, incidental or food expenses be considered allowable expenses for consultants and contractors under the rules or in any contract between an organization and a consultant or contractor.

**19. Unsolicited Proposals**

Any unsolicited proposals received by the Board will not be considered for the purchase of goods, services or construction. All unsolicited offers will be reviewed by Procurement Services for the opportunity to conduct a full and open competition for the goods, services or construction in question.