

ADMINISTRATIVE PROCEDURE

Business Administration

Procurement Process

BUS #10

Reviewed: August 2024

Background

In accordance with the Board's [Financial Guidelines Policy](#), this procedure delineates guidelines for employees to ensure that efficient, transparent, and accountable practices are used when acquiring goods, services and capital assets for Christ The Redeemer (CTR) Catholic School Division.

Procedures

1. The function of procurement is to collaborate with departments and schools to source the required goods, services, and capital assets in order to optimize cost and performance.
2. Employees charged with fiscal responsibility and accountability are authorized to purchase on behalf of CTR Catholic. All purchases must be approved by the appropriate signing authority listed below:
 - Superintendent – For all purchases above \$75,000.
 - Associate Superintendents
 - Directors
 - Coordinators
 - Principals
 - Vice Principals
3. Those authorized to purchase on behalf of CTR Catholic must make purchasing decisions that shall not compromise CTR Catholic's responsibility to utilize public funds responsibly. This includes avoiding conflicts of interests and promoting fairness and transparency that promotes competition.
4. Commodity Guidelines
 - 4.1 Purchasers must review the contracted supplier listing prior to purchasing. The listed suppliers have an agreement with CTR Catholic to secure competitive pricing.
 - 4.2 All Furniture and Equipment orders must go through CTR Catholics Facilities Department in accordance with BUS #04.
 - 4.3 All technology, including hardware and software, must go through the IT department in accordance with [GEN #21](#) and [BUS #14](#).
5. All purchases that fall outside of the commodities listed in section 4 must follow the expenditure guidelines listed in section 6. Only the Superintendent may approve exceptions.

6. The following expenditure guidelines must be followed. Appendix A outlines the procurement workflow:
 - 6.1 Purchase below \$10,000: Direct Purchase using a purchasing card or invoice.
 - 6.2 Purchases between \$10,000 and \$20,000: Purchaser must obtain a minimum of three (3) verbal quotes to ensure competitive pricing.
 - 6.3 Purchases between \$20,000 and \$50,000: For purchases of commodities without existing contracts, Purchaser must obtain three (3) written quotes and submit quotes to the Procurement Officer for documentation purposes. The Request for Quote form must be used when requesting quotes from suppliers.
 - 6.4 Purchases above \$50,000: For purchases of commodities without existing contracts, must be requested through the “Purchase Requisition Form” and sent to the Procurement Officer. Procurement shall conduct a risk management assessment to ensure appropriate procurement processes are followed as per trade agreement guidelines.
 - 6.5 Construction Projects: All construction projects must be managed through the Facilities and Corporate Service departments.
 - 6.6 Purchases that require a contract beyond a one (1) year term: Purchaser must submit the “Purchase Requisition Form” to the Procurement Officer.
7. The entire scope of a project should promote competition and maximize value.
 - 7.1 Public tenders will be posted to Alberta Purchasing Connection and the Bonfire portal for the minimum required timeframe as per trade agreement guidelines.
 - 7.2 Those tasked with evaluating proposals are required to evaluate without bias and as outlined in the tender documents. Those with a potential or actual conflict of interest as defined in the declaration form in appendix B must disclose this to the Procurement Officer prior to participating in the evaluation.
 - 7.3 The Procurement Officer shall manage contracts after a bid has been awarded in collaboration with the appropriate parties.
8. A record of written quotations, tenders and proposals must be documented and kept on file in accordance with the Financial Records Management and Retention Procedure [BUS #08 and BUS# 08A](#).
9. 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), which includes the following thresholds:
 - \$75,000, or greater, for goods.
 - \$75,000, or greater, for services.
 - \$200,000, or greater, for construction.
10. All items purchased using CTR Catholic funds or School Generated Funds become the property of CTR Catholic.

References:

Freedom of Information and Protection of Privacy Act
Agreement on Internal Trade; Annex 502.4
Trade, Investment, and Labour Mobility Agreement

Appendix A

Good/Services Purchasing Flow Chart



***Technology and Furniture & Equipment purchases must be made through the CTR IT Department and Facilities Department.**

Appendix B

Conflict of Interest Declaration Form

Christ The Redeemer Catholic Separate School Division (CTR) has obligations under the CFTA (Canada Free Trade Agreement), and the NWPTA (New West Partnership Trade Agreement) to ensure a competitive environment and level playing field in the solicitation process.

A conflict of interest is believed to exist when there is a private interest that could impair the fair solicitation process.

- The proponent or his or her immediate family member has a direct or indirect financial interest in the award of the contract.
- The proponent or his or her immediate family member is currently employed by CTR.
- The proponent or his or her immediate family member has access to information that has not been included in this RFP or any addendums.
- The proponent was involved in the early stages of the bid process thereby giving them an unfair advantage over other potential proponents.

Please check the box that applies:

A conflict of interest does not apply.

A potential or actual conflict of interest exists.

Details:

By signing this declaration form the proponent acknowledges that they have received and read this declaration form, and that the information provided on this form is accurate and true. The proponent also acknowledges that it is up to CTR's sole discretion to accept or reject a proposal if a potential or actual conflict of interest exists.

Name

Signature

Signed this _____ day of _____, 20____