

School Operations

Administrative Procedure #207 Purchasing

1. **Authorization:** The Secretary-Treasurer is responsible to develop and implement purchasing procedures that are in alignment with Board policy.
2. **Competitive Pricing:** As a general rule, competitive prices shall be obtained for the purchase of goods, services, and construction projects as follows:

Aggregate Value of Purchase	Method of Quotation	Approval By
Goods, services, or construction projects \$0 to \$2500	No formal requirement to obtain competitive prices, although common sense and value for money must be respected for these lower-dollar-value acquisitions	Principal, Secretary-Treasurer, or Superintendent
Good, services, or construction projects \$2501 to \$5000	Verbal quotes required (minimum of three; rationale to be documented if fewer than three quotes obtained)	Principal or Superintendent
Goods, services, or construction projects \$5001 to \$74,999	Written quotes required (Minimum of three; rationale to be documented if fewer than three quotes obtained)	Superintendent
Goods or services \$75,000 or greater	Public tenders – Posted to The Alberta Purchasing Connection website.	Board of Directors
Construction projects \$75,000 to \$199,999	Written quotes required (minimum of three; rationale to be documented if fewer than three quotes obtained)	Board of Directors
Construction projects \$200,000 or greater	Public tenders	Board of Directors

- a. The Secretary-Treasurer may suspend the need to acquire competitive pricing due to the emergent nature of the purchase being considered, the undue amount of effort required to obtain such pricing, or the relatively low cost of the purchase being considered.
3. **Consortium or Government Standing Offers:** If a good or service can be purchased through a consortium, or a government standing offer, that has followed formal price negotiation practices, the purchase will be considered to be in compliance with article (2) above.
4. **Transparency:** All purchases made on behalf of the Thrive Charter School Society (the school) must be made in such a manner to ensure an open and transparent process.
5. **Gratuities:** Staff members must not solicit personal gratuities in any form or accept personal gifts or services, other than those of nominal value (approximately \$50 in value or less), from present or potential suppliers that might influence or be viewed to influence purchasing decisions. Any gratuities, rewards, or other incentives provided by a vendor, other than those of nominal value as described above, must be provided to the school, rather than to an individual staff member. The superintendent or designate is authorized to distribute such gratuities, rewards, or other incentives, but must do so in a manner that is of demonstrable benefit to the school.
6. **Tendering Documents and Process:**
 - a. **Sealed Tenders and Opening:** All tenders and replies to requests for proposals must be submitted in a sealed envelope and addressed to the secretary-treasurer or designate. Tenders and replies to requests for proposals will be opened at the time specified and be kept as record for review as required.
 - b. **Withdrawal of Tenders:** Tenders and replies to requests for proposals may be withdrawn prior to the scheduled opening. Those tenders and replies to requests for proposals received after the specified date and time of opening will not be considered.
 - c. **Conditions:** All tender calls and requests for proposals will be subject to any or all of the following conditions:
 - i. The school reserves the right to reject any or all tenders, bids, and replies to requests for proposals and accept that tender, bid or reply to request for proposal which appears to be in the best interests of the school.

- ii. The school reserves the right to accept or reject any proposal and, further, reserves the right to negotiate with the selected firm to clarify and enhance the contract tender or proposal.
 - iii. The school reserves the right to seek proposal clarification with the proposers to assist in making evaluations.
 - iv. The school reserves the right to amend, make adjustment, or rescind all or any part of the bid or request for proposal tender document prior to the closing date.
 - d. Evaluation: Tenders and requests for proposals may consider factors beyond pricing, including but not limited to the following:
 - i. Service
 - ii. Quality
 - iii. Availability
 - iv. The supplier's ability to fulfil the requirements of any standards or specifications that form part of the tender documents.
 - e. Tendering Venue: Tenders will be normally posted on either the Alberta Purchasing Consortium website or the Alberta Construction Association (COOLNet) website.
7. **Purchasing Contracts:** All written contractual agreements for the purchase and/or contracting of goods and services must be filed with the Secretary-Treasurer.