

SD42 PROCEDURE 4600.1

PROCUREMENT FRAMEWORK FOR GOODS, SERVICES AND CONSTRUCTION

AUTHORITY TO INITIATE EXPENSES

The Board of Education (Board), pursuant to [Policy 4203 Financial Planning and Reporting](#), establishes budgets and delegates to the Secretary Treasurer and the Superintendent the authority to incur expenses within approved budgets.

Administration, through its management structure and allocation of budgets to operational activities, delegates to budget managers authority to initiate expenses in accordance with approved budgets, Board policies, and district procedures.

The Board, through [Policy 4410 Travel Expenses](#), has defined certain types and amounts of expenses that are prohibited, restricted, or require specific approval or processing requirements.

PURPOSE

This procedure establishes the administrative framework for the procurement of goods, services, and construction on behalf of the School District.

Consistent with [Policy 4600 Procurement](#), procurement activities shall be conducted in a manner that:

- supports educational and operational requirements;
- demonstrates accountability for the stewardship of public funds;
- promotes transparency and fair access to procurement opportunities;
- achieves value for money, considering quality, reliability, sustainability, risk, and long-term outcomes;
- maintains ethical conduct and protects confidential information;
- complies with applicable legislation, trade agreements, Board policies, and district procedures; and
- utilizes procurement methods that are proportionate to the value, complexity, and risk of the procurement opportunity.

RELATED PROCEDURES

The following procedures support and supplement this procurement framework:

- [Procedure 4600.2 Procurement Product Standards](#) establishes requirements for the development, maintenance, communication, and use of district product standards.
- [Procedure 4600.3 Competitive Bidding and Evaluation](#) establishes requirements for competitive solicitation processes, evaluation of submissions, vendor selection, awards, debriefings, and vendor complaints.

PROCUREMENT ROLES AND RESPONSIBILITIES

- Budget Managers: identify operational requirements, support procurement planning, administer contracts, and monitor vendor performance.
- Contract Managers (or Designated Project Managers): monitor contractor performance, document contract issues, and complete post-contract evaluations where applicable.

- Procurement Services Department: administer procurement processes, provide procurement advice, maintain procurement records, and support compliance with procurement procedures and trade agreement requirements.
- Assistant Secretary Treasurer: oversee procurement operations, provide direction to the Procurement Services Department, review procurement strategies and contract awards as required, and exercise delegated approval and signing authority in accordance with this procedure.
- Evaluation Committee Members: evaluate submissions, declare conflicts of interest, and maintain confidentiality throughout the procurement process.
- Secretary Treasurer / Designates: establish procurement procedures, approve procurement strategies and contracts within delegated authority, and ensure overall compliance with Board policy, legislation, and trade agreement obligations.

CONFLICTS OF INTEREST

Individuals participating in procurement activities shall disclose any actual, potential, or perceived conflict of interest and comply with [Policy 7100 Employee Standards of Conduct](#) and any related district procedures.

PRODUCT STANDARDS

The school district may establish product standards for commonly acquired goods in order to improve reliability, safety, operational efficiency, maintenance support, and value for money. Staff shall comply with established district product standards unless an approved exception has been granted. Refer to Procedure 4600.2 Procurement Product Standards.

METHODS TO ACQUIRE GOODS, SERVICES & CONSTRUCTION

Methods to acquire goods, services and construction include the following:

Request for Proposals (RFP)

An RFP is used to invite interested suppliers to submit proposals. Standard RFP documentation is utilized, outlining award criteria, general terms and conditions, specifications, and specific requirements.

Invitation to Tender (ITT)

An ITT is used for construction and capital projects and involves issuing a call for tenders with the contract awarded to the lowest-priced bidder meeting all mandatory requirements and specifications.

Invitation to Quote (ITQ)

An ITQ is used to acquire goods, or low value/low risk services. ITQ's invite interested suppliers to submit competitive bids for evaluation. While the school district generally awards contracts to the lowest-priced bidder meeting specifications, the ITQ allows for some flexibility in the selection process other than price (e.g. best delivery lead time).

Request for Pre-Qualifications (RFPQ)

An RFPQ is used to pre-qualify vendors such as general contractors, architects, photographers, and engineers. Pre-qualified vendors can then bid on upcoming projects using an invite only RFP or ITQ.

Expression of Interest (EOI)

An EOI may be used to gauge interest in a project and solicit useful information from suppliers. This process may precede the issuance of an RFP, ITT, or ITQ, and while it may not request market prices, it does not result directly in a contract award.

Direct Award

A direct award is a contract awarded to a supplier without a competitive process. While competitive procurement should be undertaken to the extent reasonable, a direct award may be issued under the following criteria:

1. the contract is with another government organization or is for services provided by lawyers or notaries;
2. an unforeseeable situation of urgency exists, and the goods, services or construction could not be obtained in time by means of a competitive process;
3. a competitive process would interfere with the Board's ability to maintain security or order or to protect human life or health;
4. the acquisition is of a confidential or privileged nature and disclosure through an open bidding process could reasonably be expected to compromise school district confidentiality, cause economic disruption or be contrary to the public interest; or
5. it can be demonstrated that only one contractor is qualified, or is available, to provide the goods, services or construction, such as in the following circumstances:
 - a. The product or service directly interfaces with or is attached to equipment of the same manufacturer, and no other manufacturers products will correctly and effectively interface with existing equipment.
 - b. The product is to supplement existing equipment for use and operation and must exactly match the existing equipment to provide uniformity for instructional purposes. Uniformity should provide a significant instructional benefit.
 - c. The main purpose for acquiring equipment, supplies or services is to replicate specific outcomes, using the exact products that produced the original results may be necessary.

SOLICITATION METHOD SELECTION

The method of solicitation to acquire goods, services and construction is determined by or in consultation with the school district's Procurement Services Department and takes into consideration the nature of goods, services or construction being procured, the value and complexity of the opportunity, and the appropriate form of contract. The value includes the estimated fees and expenses for the full duration of the contract including anticipated options for extensions or renewals.

Prior to initiating a new procurement, staff should first consider whether the requirement can be satisfied through existing contracts, cooperative purchasing arrangements, purchasing consortiums, pre-qualified vendor arrangements, internal resources, surplus assets, shared services, or other demand aggregation strategies that may provide the required goods or services in a cost-effective and efficient manner.

Where district product standards have been established, procurement activities shall be conducted in accordance with Procedure 4600.2 Procurement Product Standards. Requests for non-standard products may require review or approval by the applicable district department or product selection committee.

Opportunities should be advertised for competition to the extent reasonable, while ensuring that the cost and time associated with using a competitive process are proportionate to the benefit received. A minimum of three written quotations should be obtained and considered for goods, services, and construction valued at \$10,000 or more, where practical. When it is known that there are fewer than three suppliers who could reasonably be expected to satisfy the need, the number of quotations may be reduced.

If a supplier is to be directly awarded a contract valued at \$25,000 or more without a competitive process, a direct award justification form must be prepared and approved by the Secretary Treasurer or Assistant Secretary Treasurer prior to executing the contract.

When pricing has been established by another government body or purchasing consortium by competitive processes, the Procurement Services Department may seek approval to “piggyback” off of that contract pricing and apply the resulting prices to school district purchases.

Where a purchase is funded by a Parent Advisory Council (PAC) and they have made their own selection of product that meets the district’s standards and terms of business, the purchase may proceed. PACs are encouraged to work with the schools to contact the Procurement Services Department when contemplating the purchase of equipment, supplies or services in order to gain the benefit of district experience and economies of scale in procurement and to minimize the PAC’s efforts required to accomplish the purchase.

PUBLIC ADVERTISEMENT CONSIDERATIONS

In accordance with [New West Partnership Trade Agreement](#), Procurement solicitations with an estimated value of \$75,000 or more for goods and services and \$200,000 or more for construction will be posted openly on Province of British Columbia’s BC Bid Portal (www.bcbid.gov.bc.ca) unless it is open to only pre-qualified vendors established by an RFPQ or criteria for a direct award is met.

The school district should issue a Notice of Intent (NOI) on BC Bid in situations when it intends to direct award a contract in excess of the above value thresholds for an open competitive process for which it is believed that only one contractor is qualified or available to meet the need. The NOI will disclose why the direct award is being contemplated, why it is justified, and will invite suppliers to challenge the potential direct award. If a challenge is received pursuant to a NOI, the school district will assess whether the challenge is justified and whether a competitive process should be undertaken.

COMPETITIVE BIDDING AND EVALUATION PROCESS

Competitive procurement processes shall be conducted in accordance with Procedure 4600.3 Competitive Bidding and Evaluation. This includes requirements relating to solicitation development, conflict of interest declarations, confidentiality, evaluation committees, award recommendations, vendor debriefings, and procurement complaints.

CONTRACT TYPES

Contracts must be in writing and prepared using school district templates approved by the Secretary Treasurer or designate, which include:

- Contract for Services (CFS)
This short-form agreement is suitable for low-value (less than \$10,000) service agreements, such as for guest speakers and after-school programming.
- General Services Agreement (GSA)
The GSA is intended for all other service-related contracts, including high-value and multi-year agreements.
- Standardized Construction Agreements
Industry-standard construction agreements, including Canadian Construction Documents Committee (CCDC) forms and applicable BC Documents Committee (BCDC) supplementary conditions, used for construction and capital projects.
- Purchase Orders
Purchase orders should be issued for all goods and services, except for purchases allowed through a district purchasing card, Amazon Business and general office supply vendor online purchase accounts, or purchases being charged to school-based budgets. In most cases, purchase orders follow an executed agreement for services. For the supply of goods, a purchase order is used as the contract.

Other forms of contracts, including vendor-provided contracts, may only be used if approved by the Secretary Treasurer or designate, except for Standardized Construction Agreements executed in accordance with the delegated authority provisions of this procedure.

Contracts must be signed:

- before services or construction commence or goods are delivered; or
- in the case of an unforeseen emergency, as soon as possible thereafter.

CONTRACT TEMPLATE REVIEW PROCESS

The Procurement Services team shall review standard contract templates at least every three years, or sooner where legal, regulatory, insurance or operational requirements change.

APPROVAL OF CONTRACTS

The preparation and signing of contracts for the acquisition of goods, services, and construction, is usually coordinated by the Procurement Services Department. Once the content of the contract is approved by the designated signing authority of the school district, the contract is issued to the supplier for signing by their authorized representative, then returned to the school district for final signature.

Notwithstanding the above, authority to execute certain standardized construction agreements may be further delegated by the Secretary Treasurer where such agreements are based on industry-standard forms and have been approved through a Board-authorized procurement process.

All contracts for the acquisition of goods, services, and construction, must be signed by the Secretary Treasurer or designate. The Secretary Treasurer has designated signing authority under this procedure as follows:

Contract Value	Designated Signing Authority
Up to \$25,000	Manager, Procurement Services
Up to \$100,000	Assistant Secretary Treasurer
Over \$100,000	Secretary Treasurer

Delegated Authority for Standardized Construction Agreements

The Secretary Treasurer delegates authority to the Director of Facilities to sign standardized construction agreements, including CCDC forms such as CCDC 2, provided that all of the following conditions are met:

- the contract form is an industry-standard agreement and is only amended to:
 - incorporate the applicable Risk Provisions required by the BC Schools Protection Program; and
 - for CCDC 2 contracts, incorporate the most current version of the applicable BCDC Supplementary Conditions.
- the contract award has been approved by the school district in accordance with procurement procedures
- the contract value is within the approved budget for the related capital project
- there are no material deviations from the tender or award terms

Any construction agreement that includes material amendments, supplementary conditions beyond standard schedules, or terms that vary from the approved form must be signed by the Secretary Treasurer or designate.

Execution of contracts under delegated authority does not alter requirements for Procurement Services Department coordination or pre-execution review of contract form and compliance with this procedure.

CONTRACT AMENDMENTS

Contract amendments must be documented in writing and approved by the appropriate signing authority. Amendments shall not materially alter the scope, nature, intent, term, or value of the original contract in a manner that would have affected the original procurement strategy, competition, supplier selection, or contract award.

Contract amendments shall not be used to circumvent competitive procurement requirements. Where a proposed amendment represents a substantial change to the original requirement, the school district shall determine whether a new procurement process is required.

CONTRACTOR PERFORMANCE MONITORING

The school district is required to monitor contractor performance to ensure goods, services, and construction are provided in accordance with contract requirements, specifications, service levels, schedules, safety requirements, and other performance obligations.

Budget managers, project managers, and other designated staff responsible for contract administration should document significant performance issues, including non-performance, deficiencies, delays, safety concerns, failure to meet service requirements, and corrective actions requested or taken.

Contractor performance information may be considered when evaluating contract extensions, renewals, vendor pre-qualification, and future procurement decisions, provided such information is documented and applied fairly in accordance with Procedure 4600.3 Competitive Bidding and Evaluation.

Where contractor performance issues cannot be resolved through normal contract administration, the matter shall be referred to the Procurement Services Department for further review and determination of appropriate contractual remedies.

CONTRACT PERFORMANCE EVALUATION

Contract performance evaluations shall be completed for goods and services contracts with an aggregate value of \$200,000 or more and construction contracts with an aggregate value of \$500,000 or more. Contract performance evaluations may also be completed for lower-value contracts where significant performance issues, safety concerns, disputes, or contract deficiencies arise.

Contract performance evaluations may be conducted during the contract term, prior to a decision regarding a contract renewal or extension, in advance of a subsequent procurement process, or following substantial completion or expiry of the contract.

Contract performance evaluations may consider factors including quality of deliverables, adherence to schedule and budget, responsiveness, contract management, safety performance, dispute resolution, and achievement of project objectives.

The results of contract performance evaluations shall be documented and retained with the procurement or contract file and may be considered when assessing contract renewals, extensions, future procurement opportunities, pre-qualification processes, and vendor performance history.

Contract performance evaluations shall be conducted fairly, consistently, and based on documented performance information.

A standard district contract evaluation form may be prescribed by the Procurement Services Department.

PURCHASE REQUISITIONS

Employees are required to prepare and authorize a purchase requisition when a contract and/or purchase order are needed to specify unique product requirements or standard products published in District catalogues.

The Procurement Services Department reviews all requisitions to ensure product standards are acceptable, terms of business are appropriate and required pricing activities are conducted before a purchase order is issued to the supplier. Purchase Orders may be issued as either regular Purchase Orders or Blanket Purchase Orders (which enable a series of purchases to be made but must not circumvent requirements for pricing activity).

PURCHASING CARDS (P-CARDS)

District Purchasing Cards are credit cards issued by the school district to designated employees to conduct convenient and simplified purchasing and payment activities for uses authorized within the purchasing card manual made available to cardholders. Examples of purchases that are allowable on P-Card are travel, memberships, and professional development.

PROCUREMENT RECORDS

Procurement and contract records shall be maintained in accordance with applicable records retention requirements and shall include documentation supporting procurement decisions, evaluations, approvals, contract amendments, contractor performance monitoring, and post-contract evaluations.

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