

Purchasing	
Adopted: 2021-2022	Last Reviewed/Revised: April 3, 2023
Next Scheduled Review: 2025-2026	

Approved Policies and Procedures:

- [I-25 Purchasing](#)
- [I-31 Annual Budget Review and Financial Report](#)
- [III-13 Corporate Purchasing Card Distribution and Usage](#)
- [VI-86 Corporate Purchasing Card Distribution and Usage](#)
- [IV-100 Employee Credit Facility](#)
- [VI-33 Employee Health Insurance](#)
- [V-03](#)



Bid:

Board of Trustees: Elected or appointed members of the Halton Catholic District School Board

Calling Agent: the individual issuing a competitive bid on behalf of the HCDSB

Claim: a loss demand or assertion by a claimant for compensation, payment, or reimbursement for a loss under a contract

Competitive: an opportunity to compete for HCDSB business

Confidential: delivered under circumstances where all or part of the goods and/or services relate to or be considered by the authority under the kind which the HCDSB in the absence of the public or where the nature of records, the goods and/or services are for use or provided to the discipline to which would be

Conflict of Interest: a situation in which an HCDSB employee or Trustee of the Board is involved in multiple interests, financial or otherwise, one of which could corrupt the motivation or decision-

Non-competitive Procurement: a procurement method where the usual competitive process is suspended and a contract is awarded to one vendor.

Piggyback Clause: a clause in a contract that allows a contractor to provide goods and/or services to other agencies or government bodies have awarded through a competitive bid process.

Procurement Process: the process by which the government acquires goods and services.





Requirements are outlined under the following headings:

1. Supply Chain Code of Ethics
 - 1.1 Personal Integrity and Professionalism
 - 1.2 Accountability and Transparency
 - 1.3 Compliance and Continuous Improvement
2. ~~Separation of Duties~~
3. ~~Approval Authority~~
 - 3.1 ~~Approval Authority to Request Goods and Non-Consulting Services~~
 - 3.2 ~~Approval Authority for Contracts and Leases~~
 - 3.3 Ap
4. Application of Administrative Procedure
5. General Authority
6. ~~Procurement Thresholds and Process~~
 - 6.1 Informal Process
 - 6.2 Formal Quotation Process
 - 6.3 ~~Open Competitive Process – Request for Tender~~
 - 6.4 Open Competitive Process – ~~Request for Proposal~~
 - 6.5 Non-
 - 6.6 ~~Approval Authority for the FPO and WSOA~~
 - 6.7
 - 6.8 ~~Execution of Bid~~
 - 6.9 Contract Awards
 - 6.10 ~~Non-Open Bids~~
 - 6.11 Bid Protest
7. ~~Vendor Performance Evaluation~~
8. ~~Multiple Sources and the Drawdown Process~~
9. Claims or Possible Claims
10. Cooperative Purchasing
11. ~~Sustainable Procurement~~
12. ~~Disposal of Surplus Goods and/or Equipment~~
13. Prohibitions and Compliance
14. Exceptions

~~Proceeding No. M-~~





on its terms, the process may involve negotiations after any or all of the specifications, contract forms and prices.

6.5. Non-Competitive Procurement

Emergency Purchase Process – See Single Source

The emergency purchase process may be used for any dollar value when the availability of any part of the specification is in jeopardy. This process is for purchasing services. In the event of an emergency, the Purchasing Manager is required to document the emergency process.

When the Board of Education Services formally they have delegated the authority of the Senior Manager.

hours, then the Single/Sole Source Approval Form will be completed and approved the following day. This documentation will be completed and approved by the

HCDSB

documentation in the case of a competitive dispute.

Sole Source Procurement:

Where only one vendor can meet the requirements of a procurement, Purchasing -competitive procurement in the circumstances outlined

to avoid

competition between vendors to discriminate against a vendor or to circumvent the requirements of this Administrative Procedure. This documentation will be

HCDSB and

may be used as supporting documentation in the case of a competitive dispute.

Direct Negotiated Process

Unless otherwise provided for in this Administrative Procedure, the Manager, Purchasing Services may enter negotiations with one or more vendors for the supply of goods and/or services when any of the following conditions apply:

The goods and/or services are made available as a result of an emergency that involves a non-reasonable use of any other prescribed procurement process.

calls.





evaluation rating matrix. The successful proponent(s) shall not engage in any restrictions related to the procurement and shall not engage in any process and refrain from engaging in activities that may create or appear to create a Conflict of Interest. HCDSB will require a proponent to sign a Conflict of Interest Declaration and Non-Divulgence Agreement. The HCDSB will require a proponent to sign a Declaration of Interest during procurement activities applicable to all evaluation team members.

6.9.

The award of a bid or contract shall be made in writing and shall be made to the successful proponent entering into a contract that is satisfactory to the HCDSB. Provided,

the said Bid shall, with the stated conditions, specifications and binding contract. The contract must be finalized using the form of agreement/contract that was released with the procurement document as a formal award.

The successful proponent(s) will be provided with the name of the successful proponent(s), start and end dates, including any options for extensions. An information provided must comply with the MIPDA Law and the contract terms and conditions.





Any suspension must be approved by the Manager of the department responsible and by the Manager, Purchasing Services.

The suspension and the length of the suspension details as to the reason for it.

9. Claims or Possible Claims:

The HCDSB shall not be liable for claims or possible claims against it or its employees or otherwise put the HCDSB in a position of financial liability or proceedings (excepting only construction lien demands, notices or proceedings) by or against or otherwise involving the HCDSB.

10.

The Manager, Purchasing Services shall encourage cooperative purchasing with other school boards and other units of government or their agencies of public authorities, or utilize a "piggy-back clause" to existing Ministry or government services contracts or other cooperatives, whenever the best interest of the HCDSB will be served.

11. Sustainable Procurement

The Manager, Purchasing Services per Policy V-15 Environmental Stewardship shall encourage fair and whenever possible environmentally sustainable goods and services while giving vendors equitable access to HCDSB business.

The objectives of sustainable procurement are to:

Establish the HCDSB as an environmental role model for public procurement by making it a priority to procure environmentally sustainable Goods and Services where feasible and cost effective;

Communicate the importance of sustainable procurement to HCDSB employees and citizens in general;

Enhance the quality of the procurement process and

Increase the conservation of resources using more sustainable Goods and Services that require less energy and materials to produce.

12 Disposal of Surplus Goods and/or Equipment

The Manager, Purchasing Services is authorized to dispose of surplus goods and equipment in accordance with the Board's Procurement Policy 33.

3. Compliance, Prohibitions and (

No acquisition of goods and/or services shall be made through online classified services or auction sites such as Kijiji, Craigslist, eBay, Govdeals, etc.

No purchase of the Board's equipment by an HCDSB employee shall purchase or offer to purchase on behalf of the HCDSB any Goods or Services, except in accordance with these procedures.

All HCDSB employees shall act in a manner consistent with the objectives of this procedure and is subject to disciplinary action.





7.