CATHOLIC DISTRICT SCHOOL BOARD OF EASTERN ONTARIO
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BOARD ADMINISTRATIVE PROCEDURE

ADMINISTRATIVE PROCEDURE

1109 Purchasing of Goods and Services

DIRECTIONAL POLICY

1100 Nurturing & Protecting Resources

Title of Administrative Procedure:

Purchasing of Goods and Services

Date Approved:

November 2025

Projected Review Date:

November 2030

Directional Policy Alignment:

This Administrative Procedure aligns with the Nurturing and Protecting Resources Directional Policy by ensuring that the Board is leveraging all available resources.

Alignment with Multi-Year Strategic Plan:

The Purchasing of Goods and Services procedure supports the Board's strategic priority to nurture by leveraging all available resources. This procedure supports the Board's goal to Provide transparency and accountability regarding procurement of board resources and that the resources are procured in a fair and transparent process.

CDSBEO Strategic Plan 2025-2030

Purpose

The Board is considered a Broader Public Sector (BPS) organization. This Administrative Procedure ensures that publicly funded goods and services, including construction, consulting services, and information technology are acquired by BPS organizations through a process that is open, fair, and transparent while following applicable legislation.

Principles

1. This Administrative Procedure applies to all individuals involved in the purchasing of

supplies and services on behalf of the Board.

2. Every effort shall be made to competitively procure, whenever possible, environmentally appropriate, and ecologically sound products while giving suppliers fair and equitable access to Board business and to obtain and purchase all goods and services at the best value for public money.

3. The purchase of goods and services must be in accordance with all applicable Federal and Provincial Acts, Regulations and Trade Agreements pertaining to public procurement, specifically the Broader Public Sector Procurement Directive and The Building Ontario Business Initiative (BOBI).

4. Applicable sales taxes should not be taken into consideration when determining the value of procurement and dividing a large order into multiple smaller orders is not permitted.

5. The purchase of goods and services should consider the impact on other departments to ensure the requirements of each department are addressed (i.e. health & safety, privacy, electrical requirements, technology, etc.). Individuals must follow the appropriate procurement process established by the Purchasing Department.

6. All schools and departments should purchase 'identified' goods and services from 'designated' suppliers with whom the Board has entered into contracts/agreements (i.e., Office Supplies, Classroom Furniture, Science supplies, etc.). Purchases from 'designated' supplies may be transacted with a purchase order or controlled online ordering, depending on the ordering process established by the Purchasing Department.

7. The Board shall not make purchases of any kind on behalf of staff or members of the Board for personal use.

8. All documents, information and communication related to the procurement process need to be maintained according to retention policies outlined in the CDSBEO Records Retention Schedule and relevant administrative procedures.

9. The Board will utilize an electronic procurement platform for open and competitive procurements.

10. The Board may follow one of the various open and competitive methods of procurement as outlined in Appendix C.

11. The Board may participate in procurement activities administered by cooperative purchasing agencies involving school boards and/or government agencies whenever it is in the best interest of the Board to do so. These procurement activities will meet the minimum requirements as set out in this Administrative Procedure.

12. There may be special circumstances that may require the Board to use a non-competitive procurement process. Exemptions are provided through Sole or Single Source or Non-Application Provision of the Canadian Free Trade Agreement (CFTA), Canada-European Union Comprehensive Economic and Trade Agreement (CETA), Ontario-Quebec Trade and Cooperative Agreement (OQTCA) or other regulations applicable to the Board. Justification must be documented using the 'Non-competitive Approval" form (Appendix D) prior to commencement of a non-competitive procurement and must be approved in accordance with Appendix. B.

13. All goods & services must be procured as indicated in Appendix A, unless exempted under item 14.0. The values may change or differ depending on the appropriate trade agreement threshold. Purchasing department will support during the procurement process.

14. Non-competitive procurement may be utilized for procurement of the following:

    - Real Property
    - Projects in which an Ontario government ministry specifies the goods and/or services to be used.
    - Goods and Services that are financed primarily from donations and are subject to conditions that are inconsistent with this Administrative Procedure

15. Procurement of all goods and services (including consulting and those purchased with School Generated Funds) must be approved by an appropriate authority in accordance with the Procurement Approval Authority Schedule (PAAS) in Appendix B.

16. Procurements and the resulting contracts must be managed responsibly and effectively. Supplier performance must be managed and documented, and any performance issues

must be addressed.

Supply Chain Code of Ethics

Personal Integrity and Professionalism: Individuals involved with supply chain activities must act, and be seen to act, with integrity and professionalism. Honesty, care, and due diligence must be integral to all supply chain activities within and between BPS organizations, suppliers and vendors. Respect must be demonstrated for each other and for the environment. Confidential information must be safeguarded. Participants must not engage in any activity that may create, or appear to create, a conflict of interest, such as accepting gifts or favours, providing preferential treatment, or publicly endorsing suppliers or products.

Accountability and Transparency: Supply Chain activities must be open and accountable. Purchasing and contracting activities must be fair, transparent and conducted with a view to obtaining the best value for public money. All participants must ensure that public sector resources are used in a responsible, efficient and efficient manner.

Compliance and Continuous Improvement: Individuals involved with purchasing or other supply chain activities must comply with this Code of Ethics and the laws of Canada and Ontario. Individuals should continuously work to improve supply chain policies and procedures, to improve their supply chain knowledge and skill levels, and to share leading practices.

Responsibilities

The Board of Trustees is responsible for:

- Reviewing this Administrative Procedure to ensure its alignment with the Nurturing and Protecting Resources Directional Policy

The Director of Education is responsible for:

- Reviewing this Administrative Procedure to ensure its alignment with the Nurturing and Protecting Resources Directional Policy

The Superintendent of Business is responsible for:

- Assigning resources to ensure the implementation of and compliance with this Administrative Procedure.

The Manager of Finance is responsible for:

- Ensure all staff and departments are aware of and comply with this administrative procedure.
- Ensuring that systems and processes are in place so that all purchases of goods and services are compliant with Purchasing Administrative Procedure, Ontario Broader Public Sector (BPS) Directives and CETA / CFTA where applicable.
- Ensuring the Purchasing Department maintains overall responsibility for determining the terms and conditions of tendering (including the form and amount of financial security and insurance required), and for administering tender calls and contracts resulting from the tenders.
- Ensuring that the Appendices to this Administrative Procedure related to the purchasing function, is modified as required to remain current and relevant.
  Providing tools and support to each principal, supervisor, manager, and superintendent to ensure his or her staff are appropriately informed and comply with this Administrative Procedure.

Superintendents, Principals, Managers and Supervisors are responsible for:

- Ensure staff under their direction are aware and comply with this administrative procedure.
- Request assistance from Purchasing department when needed/required.
  Submitting requisitions accurately in the financial software used by the Board

Progress Indicators

- Purchase orders are opened for the appropriate procurement value.
- Proper approvals are obtained according to the Procurement Approval Authority Schedule.

Definitions

Emergency – Emergencies are defined as circumstances or situations beyond anyone's control which have the potential of affecting the health, life or safety of students or other personnel. Failure to plan and allow sufficient time for a competitive process does not constitute an unforeseeable situation of urgency.

Sole Source – The use of a non-competitive procurement process to acquire goods or services where there is only one available supplier for the source of the goods and services.

Single Source – A non-competitive method of procurement of goods or services from a supplier in situations where there is or may be another supplier or suppliers capable of delivering these goods or services.

Consulting - A person or entity that under an agreement, other than an employment agreement, provides expert or strategic advice and related services for consideration and decision-making.

Request for Proposal (RFP) – A document used to request suppliers to supply solutions for the delivery of complex products or services or to provide alternative options or solutions. It is a process that uses predefined evaluation criteria in which price is not the only factor.

Request for Tender (RFT) – A document used to request supplier responses to supply goods or services based on stated delivery requirements, performance specifications, terms, and conditions. An RFT usually focuses the evaluation criteria predominantly on price and delivery requirements.

Request for Quote (RFQ) – A document similar to an RFT where the Board may describe exactly what needs to be purchased and the evaluation is based solely on price.

Vendor of Record (VOR) – A procurement arrangement that authorizes the Board to select a supplier from pre-qualified supplier(s) through a formal second-stage process, for a defined period, on terms and conditions set out in the VOR arrangement.

Appendices

- Appendix A – Procurement Process & Requirements
- Appendix B – Procurement Approval Authority Schedule
- Appendix C – Open and Competitive Procurement
- Appendix D – Non-Competitive Procurement Approval Form and Single/Sole Source Exception Codes
- Appendix E – Evaluation Team Conflict of Interest Declaration
- Appendix F – Evaluation Team Non-Disclosure Agreement

References

- Home - Supply Ontario
- Building Ontario Business Initiative
- Broader Public Sector Procurement Directive (ontario.ca)
- Doing business with the Government of Ontario| ontario.ca