



PROCEDURE

BU-006

PURCHASING

Superintendent Responsible: Superintendent of Business & Treasurer	Initial Effective Date: 2010/03/22
Last Updated: 2023/06/26	Next Review Date: 2027/06/25

Purpose:

- To set out standardized rules and expectations to support the efficient management of the purchasing process. These rules balance numerous objectives, including accountability, transparency, value for money and an effective quality service delivery.
- To guide employee(s) on when and how to follow the competitive purchasing process.
- To comply with mandatory requirements contained in the *Broader Public Sector Procurement Directive*.
- To provide approved authority levels in relation to dollar value expenditures are identified in this Procedure.

Guiding Principles:

This Procedure makes Grand Erie District School Board (Grand Erie) employee(s), school councils, community partners, customers, and suppliers aware of the directive which governs the planning, acquisition and management of goods, equipment, and services. By following this directive, suppliers and business partners will be treated in a consistent, fair, and open manner and internal customers will benefit from efficiency, financial control, quality and value for money.

The following beliefs will guide employee(s) in all purchasing activities:

- consider first the interest of Grand Erie and its students when acquiring goods and services
- maintain an unimpeachable standard of integrity in business relationships both within and outside Grand Erie
- act, and be seen to act, in an open, transparent, and honest manner
- do not use one's authority of office for personal benefit
- buy without prejudice, seeking to obtain the maximum value for each dollar expended
- accept no business gifts in return for business or the consideration of business
- do not engage in any business activity that may create, or appear to create, a conflict of interest

1.0 Administrative Responsibility

- 1.1 Purchasing falls under the responsibility of the Purchasing Supervisor, under the direction of the Manager of Business Services.
- 1.2 The Purchasing Department will be responsible for the acquisition of all goods, equipment and services required by Grand Erie, with the exception of the following:
 - land purchases
 - student transportation
 - legal services
 - employee fringe benefits contracts
 - projects in which Grand Erie may partner with one or more school boards or other organizations
 - projects in which an Ontario government ministry specifies the goods and/or services to be used
 - miscellaneous petty cash
 - purchase card purchases

- 1.3 Senior Administrator(s), Administrator(s), Department Manager(s) and Supervisor(s) will ensure that their employee(s) are appropriately informed and comply with Grand Erie’s approved Purchasing Policy (BU-06).
- 1.4 This applies to all goods and services acquired for use in the school or by students with school related activities regardless of funding source.
- 1.5 Purchasing Department will not make purchases of any kind on behalf of employee(s) or members of Grand Erie for personal use.

2.0 **Segregation of Duties**

- 2.1 There are five key functional roles in the purchasing process. Responsibility for these roles lies within different departments or individuals and requires segregated approval levels. The framework for this segregation of duties is shown below for all purchases other than petty cash and purchasing card.

Roles	Duties	Who
Requisition	Authorize the purchasing department to place an order following approved methods	employee(s) requiring goods and services
Budget	Authorize that funding is available to cover the cost of the order	department budget holder
Commitment	Authorize release of the order to the supplier under agreed-upon contract terms	purchasing department role in the acquisition
Receipt	Authorize that the order was physically received, correct and complete for values greater than \$2,500	individual receiving the goods and services
Payment	Authorize release of payment to the supplier	accounts payable role within the finance team

3.0 **Approval Authority Levels**

- 3.1 Authority levels identify the approval required for specific dollar values of purchasing. This delegation of authority corresponds to job roles within Grand Erie.
- 3.2 Approval for purchasing goods and services is based on the total estimated dollar value, including any agreed-upon renewals, and exclusive of applicable taxes.
- 3.3 When employee(s) wish to request a purchase that has a value greater than their authority level, the appropriate immediate supervisor will forward the approval to purchase in writing or email to the Purchasing Supervisor.
- 3.4 Grand Erie has delegated purchasing authorities as follows:

Board of Trustees	<ul style="list-style-type: none"> • all purchase contracts, in excess of \$2,500,000. • all contracts for consulting services in excess of \$100,000
Director of Education and Secretary of the Board or Superintendent of Business and Treasurer	<ul style="list-style-type: none"> • all purchase contracts for goods and services up to \$2,500,000
Manager of Facility Services	<ul style="list-style-type: none"> • facility related contracts with a value up to \$150,000
Manager(s), Academic Superintendent(s), Facility Services Division Manager(s) and Purchasing Supervisor	<ul style="list-style-type: none"> • all purchase contracts with a value up to \$75,000

Administrator(s), Principal Leader(s), Academic Coordinator(s), Teacher Consultant(s), Facility Services Supervisor(s), Non-Union Management, Buyer, Health and Safety Officer(s)	<ul style="list-style-type: none"> all purchase contracts with a value up to \$20,000
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Teachers, clerical support, custodial/maintenance support, non-union support employee(s) that make purchases on behalf of Grand Erie are required to stay within the dollar spending limit granted to them by their immediate Supervisor and are expected to ensure the budgeted funds are available to cover the purchase.

The Purchasing Department, who receives requests for purchases from the system, will, unless there are explicit instructions otherwise, assume the customer/department requesting the goods and services has authority to expend the funds and that prior budget approval has been obtained.

4.0 **Methods of Purchasing**

4.1 There are five approved methods for purchasing supplies and services:

- petty cash
- purchasing card
- purchase order
- Canadian Construction Documents Committee (CCDC) contract
- an industry-standard contract form following a competitive process.

4.2 If the value of the required goods and services exceeds the spending limits of petty cash or the purchase card, a purchase order will be issued to the supplier as a legal contract from Purchasing Department.

4.3 Spending limits for petty cash are \$75 per item and \$100 per transaction.

4.4 Spending limits for purchasing cards are set according to the Purchasing Card Manual.

5.0 **Unauthorized Purchases**

5.1 Unauthorized purchases occur when employee(s) have circumvented one of the purchasing methods by placing orders without a purchase order or uses their personal credit card to make the purchase.

5.2 To seek payment for unauthorized purchases, a cheque request will be forwarded to the respective Superintendent for action or approval. If approval is given, it will be in writing complete with an explanation of reasons why procedure was not followed. This will be attached to the cheque request and forwarded to Business Services.

5.3 Should the respective Superintendent not approve payment/reimbursement, the employee(s) will be responsible for their own payment.

6.0 **Dollar Thresholds That Require a Competitive Process**

6.1 When goods and services that are acquired on behalf of Grand Erie are expected to exceed specific estimated dollar thresholds set out below, a competitive bid process will be followed. The process will promote fair and transparent business practices.

6.2 For goods and services within the lowest threshold, only one quote is needed, either verbal or written, and the supplier may be determined by the end user.

6.3 It is the school's/department's responsibility to first determine if the required goods and services are already on a quotation or tender contract awarded by the Purchasing Department.

6.4 The Purchasing Supervisor or the Buyer will issue the competitive bid document on behalf of the school(s)/department(s) end user, who will provide the written

details of the purchase request including relevant specifications, (function, part number, colour), budget number(s), approval authority and any terms and condition unique to the acquisition.

The following dollar thresholds indicate the purchasing process to be followed by all employee(s) when procuring goods, services or a consultant:

\$0 - \$9,999.99	One quote is required when within the authority and budget limit of the employee(s).
\$10,000 - \$99,999.99	An invitational quotation process will be conducted.
\$100,000 or more	Purchases that exceed \$100,000 will be made by an open competitive procurement process. The bid document will be advertised on a nationally recognized electronic bulletin board and follow a prescribed evaluation process set out in 8.0.

6.5 Splitting requirements into multiple procurements to reduce the estimated value of a single procurement and avoid the application of the identified value threshold is not permitted

6.6 Consulting Services: Prior to commencement, any procurement of consulting services will be approved in accordance with the following dollar thresholds:

\$0 - \$99,999.99	an invitational competitive process with the intent of acquiring three (3) bids whenever possible will be conducted
\$100,000 or more	will be made by an open competitive procurement process. The bid document will be advertised on a nationally recognized electronic bulletin board and follow a prescribed evaluation process set out in section 8.0.

7.0 **Exceptions**

7.1 When it is neither practical nor possible to obtain a minimum of three prices, the Department Manager (or designate), will consult with the Purchasing Supervisor or the Buyer to obtain approval to proceed. Appropriate written documentation supporting this action will be submitted to Purchasing for attachment to subsequent purchase order.

7.2 Approval levels will not apply in the event of an emergency which includes, but is not limited to, situations where a risk exists to the health and/or safety of students and/or employee(s), or situations where a risk exists of imminent damage to any of Grand Erie facilities or property. In such cases, the Director of Education and Secretary of the Board, Superintendent of Business and Treasurer or Manager of Facility Services may waive this Procedure and authorize the purchase from a single source.

7.3 If the procurement request is for consulting services using a non-competitive process (citing an exemption under the Agreement of Internal Trade [AIT] or other trade agreements), the following written approvals will be obtained prior to sourcing the service.

7.3.1 For any value between \$0 - \$99,999, written approval from the Superintendent is required, and written authority will be submitted to the Purchasing Supervisor.

7.3.2 For a value of \$100,000 or more, written approval from the Board of Trustees will be submitted to the Purchasing Supervisor.

8.0 **Information Required in a Competitive Process at the \$100,000 Threshold**

8.1 To achieve an open and transparent competitive process, bid documents will include, as a minimum, the following information:

- a description of the needed goods, services, or construction in generic and/or functional terms specific to the business needs
- full disclosure of the evaluation criteria, process, and methodology to be used in assessing submissions, including identification of criteria considered mandatory, any technical standards that need to be met, and methods of weighting and evaluating the criteria
- a period of irrevocability where bids cannot be withdrawn
- a statement that the procurement is subject to Ontario's trade agreements
- notice that any confidential information supplied may be disclosed by Grand Erie where it is obliged to do so under *Municipal Freedom of Information and Protection of Privacy Act* (MFIPPA), or otherwise required by a court of law
- documents will have a minimum response time of 15 calendar days and will have a closing date set on a normal working day (Vendor submissions will be received prior to the deadline in order to be considered.)
- all addenda will be issued at least seven (7) days prior to the closing date; if this is not possible, the closing date should be extended accordingly
- notice of bidder or proponent entitlement to a post-award debriefing
- procedures for a supplier to follow in the event that it wants to submit protests concerning any aspect of the procurement process
- ensure compliance with appropriate regulatory bodies including but not limited to the *Broader Public Sector Procurement Directive* (BPS), *Education Act*, *Canada-European Union Comprehensive Economic and Trade Agreement* (CETA) and *Canadian Free Trade Agreement* (CFTA).
- the reference number for the bid document issued by Purchasing Department employee(s) and kept on file in the Purchasing Department.

9.0 Other Procurement Processes

9.1 Request for Information (RFI)

The purpose of an RFI is to gather general supplier or product information. This mechanism may be used when Grand Erie is researching a contemplated procurement and has not yet determined what characteristics the ideal solution would have. RFIs normally contribute to the final version of a subsequent RFP.

9.2 Request for Expression of Interest (RFEI)

The purpose of an RFEI is to gather information on supplier interest in an opportunity or information on supplier capabilities/qualifications. This mechanism may be used when Grand Erie wishes to gain a better understanding of the capacity of the supplier community to provide the services or solutions needed. Information collected in an RFEI can also facilitate selecting the best procurement process for a follow-up competition.

Note: A response to an RFI or RFEI will not pre-qualify a potential supplier and will not influence its chances of being the successful proponent on any subsequent opportunity.

9.3 Request for Supplier Qualifications (RFSQ)

The purpose of an RFSQ is to gather information on supplier capabilities and qualifications, with the intention of creating a list of pre-qualified suppliers or a Vendor of Record (VOR). This mechanism may be used either to identify qualified candidates in advance of expected future competitions or to narrow the field for an immediate need. The terms and conditions built into the RFSQ will contain specific language to disclaim any obligation on the part of Grand Erie to actually call on any supplier as a result of the pre-qualification to supply such materials or services. A pre-qualified suppliers list or VOR list may be used for purchases up to a dollar value of \$100,000.

9.4 Single Sourcing

May be used where an unforeseen situation of urgency exists and the goods, services or construction cannot be obtained by means of a competitive procurement process. Where such an urgency exists, Grand Erie management

employee(s) will conduct the procurement prior to obtaining the appropriate approval provided that the urgency has been justified in writing. Documentation describing the rationale for this decision and the process that was followed will be completed and may be used as supporting document in the case of a competitive dispute. Examples of acceptable exclusions from competitive procurement are as follows:

9.4.1 Where goods and services regarding matters of a confidential or privileged nature are to be purchased and the disclosure of those matters through an open tendering process could reasonably be expected to compromise Grand Erie's confidentiality, cause economic disruption or otherwise be contrary to the public interest.

9.4.2 Where a Contract is to be awarded under a cooperation agreement, in whole or in part, only to the extent that the agreement between Grand Erie and the Buying Group includes rules for awarding Contracts that differ from the Purchasing Policy (BU-06).

9.4.3 Where compliance with the open tendering provisions set out in this Policy would interfere with Grand Erie's ability to maintain security or order or to protect human life or health.

9.4.4 If no Bids or no Eligible Bids are received in response to a competitive Procurement process.

9.5 Sole Sourcing

May be used in the situation where only one supplier is able to meet the requirements of a procurement. Documentation describing the rationale for this decision and the process that was followed will be completed and may be used as a supporting document in the case of a competitive dispute. Examples of this situation are:

9.5.1 To ensure compatibility with existing products, services, and construction, to recognize exclusive rights, such as exclusive licenses, copyright and patent rights, or to maintain specialized products that will be maintained by the manufacturer or its representative.

9.5.2 Where there is an absence of competition for technical reasons and the goods or services can be supplied only by a particular Vendor and no alternative or substitute exists.

9.5.3 For the procurement of goods or services the supply of which is controlled by a Vendor that is a statutory monopoly.

9.5.4 For work to be performed on or about a building or land or portions thereof, leased to Grand Erie, that may be performed only by the Lessor.

9.5.5 For work to be performed on property by a contractor according to provisions of a warranty or guarantee held in respect of the property or the original work.

9.5.6 For a Contract to be awarded to the winner of a design contest.

9.5.7 For the procurement of a prototype of a first good or service to be developed in the course of and for a particular Contract for research, experiment, study or original development, but not for any subsequent purchases.

9.5.8 For the purchase of goods under exceptionally advantageous circumstances such as bankruptcy or receivership, but not for routine purchases.

10.0 Requisition Review

Purchasing Department will have the responsibility and authority to review specifications and sources of each purchase requisition. This review will include, but not be limited to:

- requests for "single or sole source" purchases
- requests for goods of a quality that seem to be greater than or less than required
- requests for material which seems inconsistent with the requirement
- requests that do not conform to established standards

- consideration will be given to not only lowest price but also the total cost of ownership, which may include purchase price, implementation fees, upgrades, maintenance contracts, license fees and disposal

11.0 **Blanket Purchase Orders**

- 11.1 At the request of the customer/end user, the Purchasing Department will release a blanket purchase order to identified suppliers for frequently used low dollar goods and services where the actual demand is unknown in advance. The blanket order request will be created and forwarded to Purchasing using the online purchasing software.
- 11.2 The blanket purchase order request will state the name of the employee(s) who will be placing orders, the term for which the purchase order will be in effect, and the maximum dollar that may be expended per order.
- 11.3 The supplier will show the unique blanket purchase order number on all of invoices used through this method. The supplier is not authorized to deliver more frequently or in any greater quantity than what has been ordered by employee(s).
- 11.4 Blanket purchase orders will have a maximum per transaction spending limit, as follows:
- 11.4.1 For all sites, other than Facility Services, the maximum amount that may be charged to a blanket purchase order for each order is \$500.
- 11.4.2 For Facility Services, the maximum amount that may be charged to a blanket purchase order for each order is \$2,000.
- 11.5 If the total dollar amount charged to the same blanket purchase orders exceeds \$15,000 per year, the commodity type and/or supplier will be reviewed to ensure the requirements of competitive bidding have not been neglected.

12.0 **Supplier Selection**

For goods and services requiring more than one competitive bid, the selection of suppliers is the responsibility of the Purchasing Department and requires consideration of the following factors:

- close coordination with other departments to obtain adequate and reasonable specifications, brand names and/or product identification numbers
- service record of the supplier, quality of goods and services, price and warranty
- suppliers that meet mandatory requirements
- notwithstanding any inter-provincial or federal agreements, and when all factors are equal, Grand Erie will purchase from the supplier who maintains a business office or manufacturing plant within Grand Erie's jurisdiction, then within Ontario and Canada

13.0 **Supplier Relations**

Grand Erie encourages partnership relations with its suppliers. However, it is our policy to maintain and practice the highest possible standards of business ethics, professional courtesy, and competence in our business transactions. The following should be observed when dealing with suppliers and their representatives:

- accord prompt and courteous reception, as well as fair and equal treatment to all suppliers and their representatives
- guarantee the confidentiality of all specifications and price quotations made by suppliers (subject to tender opening process and Freedom of Information restrictions)
- avoid putting supplier to unnecessary expense or inconvenience on returned goods
- explain as clearly and fully as possible the reason for rejection of supplier bid/proposals
- remain scrupulously free from obligations to any supplier
- keep informed about new sources of supply, methods, services, and materials and product testing

- if, for any reason, there is a requirement for bidders to re-quote, competitors will be given the same opportunity

14.0 **Supplier Obligations**

Suppliers are expected to fulfill the following basic responsibilities:

- handle all written and personal communications directly with the Purchasing Department, unless otherwise instructed
- negotiate all approved purchasing contracts and all approved sales to Grand Erie through the Purchasing Department, unless otherwise instructed
- conduct negotiations ethically, without attempts to influence through offering personal gifts
- make available through the Purchasing Department all technical or engineering systems, policies or services that might improve present or future use of supplier's products and services
- advise Purchasing Department employee(s) of any new products or services as soon as such information is available
- suggest ways and means of conducting joint efforts in research and development that might be of benefit to both organizations
- inform Purchasing Department employee(s) of changes in economic or other conditions that might affect purchasing and operating decisions
- keep all personal Grand Erie information protected and confidential in accordance with all applicable law and regulations with respect to MFIPPA and the *Personal Information Protection and Electronic Documents Act* (PIPEDA)
- all inquiries/requests for information, instructions or clarifications regarding competitive processes will be set out in writing and directed to the designated representative in the competitive document. No attempts *will be made* to contact or communicate with persons other than the designated representative regarding a tender or request for proposal. Any violation of the above requirement may be grounds for disqualification of bid/proposal

15.0 **Code of Ethics in Purchasing**

15.1 All employee(s) will comply with Grand Erie's Code of Conduct Policy (SO-12).

15.2 Grand Erie adheres to and insists upon adherence to a strict ethical standard in all of its purchasing acquisitions by all bidders and vendors, who will be required to become knowledgeable with and adhere to Grand Erie's policies in this regard.

16.0 **Conflict of Interest**

16.1 A conflict of interest exists where the decisions made and/or the actions taken in the exercise of duties by a Grand Erie employee(s), and a member of a statutory committee, could be, or could be perceived to be, affected by the personal, financial, or business interest of that person or that person's family or business associates.

16.2 In procurement activities with suppliers, employee(s) will declare a conflict of interest if the circumstance could give a supplier an unfair advantage.

16.3 Employee(s) involved in procurement activities will declare all actual or potential conflicts of interest to their supervisor in writing.

16.4 School council members are governed by their individual school council's conflict of interest by-laws (as required by *Ontario Regulation 612/00*).

16.5 In addition, *the Education Act of Ontario, Chapter E.2, Section 217* states: "No teacher, supervisory officer or other employee of a board or of the Ministry shall, for compensation of any kind other than their salary as such employee, promote, offer for sale or sell, directly or indirectly, any book or other teaching or learning materials, equipment, furniture, stationery or other article to any board, provincial school or teacher's college, or to any pupil enrolled therein, or shall, directly or indirectly, give or pay compensation to any such teacher, supervisory officer or employee for such purpose."

17.0 Cooperative Purchasing

17.1 Grand Erie encourages cooperative purchasing initiatives with other school boards and public-sector agencies in order to obtain best prices through economies of scale and/or work task efficiencies through shared services.

17.2 When a participating in cooperative purchasing processes, the dollar thresholds in this process will be followed.

18.0 Standardization

Standardization examines a specific common need with the goal of selecting goods or services that best fits that need. Goods or services that are used in more than one location may become the standard for that need in order to combine reduced costs through economies of scale and increase efficiencies.

19.0 Environmental Protection

Purchasing Department employee(s), in consultation with the end user/department, will strive to source, promote and support environmentally sensitive products and services. All criteria being equal, consideration will be to products and services that:

- are durable, reusable and contain maximum recycled content
- are competitively priced
- eliminate waste
- are purchased from local sources

20.0 Industry Safety Standards

All goods and services purchased by Grand Erie will comply with current Federal, Provincial and Municipal legislation, regulations and standards, and all Grand Erie requirements related to health and safety. These include but are not limited to Canadian Standards Association (CSA), Electrical Safety Authority (ESA), *Occupational Health and Safety Act* (OHSA), Workplace Hazardous Materials Information Systems (WHIMS) requirements, and *Workplace Safety & Insurance Act* (WSIA).

21.0 Disposal of Surplus/Obsolete Equipment

21.1 All furniture and equipment, even if obtained through donation, will be disposed of by central services as per Disposal of Surplus Damaged or Obsolete Furnishings and Equipment Procedure (FA-021).

21.2 Purchasing Department works closely with Facility and IT Services, and, where appropriate, the site storing the item(s), to determine the most cost-effective method of disposing the surplus and/or obsolete furniture and equipment.

21.3 All sites wanting to request pick up and removal of these items will complete the appropriate form, Purchasing Memorandum: Disposal of Books, Furniture and Equipment, and forward it to the Purchasing Department for action. The document is available on the Purchasing section of Grand Erie's staff portal.

21.4 Purchasing Department will have the authority to sell, exchange or trade-in all items declared surplus or obsolete-by Grand Erie.

22.0 Receiving and Inspection of Purchased Goods and Services

22.1 The site/end user who has requisitioned the purchased goods and/or services is responsible for inspecting contents of the order in a timely manner to ensure completeness and accuracy.

22.2 If the value of the purchase order is greater than \$2,500, the end user is required to sign and date the (site) copy of the purchase order and forward to Business Services Department for invoice payment. If an item(s) is found to be damaged or on backorder, the site/end user will inform accounts payable employee(s) that payment of this item(s) should be held until such time as the order is complete and this confirmation is forwarded to Business Services.

- 22.3 The site/end user should inform Purchasing Department employee(s) about areas of concern related to these goods and services or some other aspect related to the purchasing process.
- 22.4 It is recommended that the site/end user communicate with Purchasing Department employee(s) when purchase requests have taken an unreasonable length of time to be delivered.
- 22.5 When the goods and/or services to be ordered is urgently needed by the end user, the site secretary will send an email notice to Purchasing Department requesting immediate attention. This notice will include the requisition number.
- 23.0 **Accessibility**
- 23.1 Grand Erie will make every reasonable effort to provide purchasing documents in an accessible format upon request as part of our *Integrated Accessibility Standards Regulation* (ISAR) customer service standards.
- 23.2 In the event a document cannot be made available in an accessible format (i.e., CAD drawings or blueprints), Grand Erie will provide a written explanation that it is not practicable to do so.

Definitions:

Blanket Purchase Order: A Blanket Purchase Order is one that is open for use for a specific period of time, generally a school year or budget year. When requesting a Blanket Purchase Order, sites will include the names of employee(s) that are authorized to make purchases against the Blanket. This type of purchase order is intended for repetitive low dollar goods and services and the Purchase Order will show a dollar amount that may not be exceeded for each order.

Bonds: There are various types of bonds that may be requested in competitive bids documents, primarily for services related to building renovation and/or construction projects.

- Labour and Material Bond is a bond issued by a surety company to ensure that the contractor will pay its suppliers and thereby protects Grand Erie against items which might be granted to a supplier should the contractor not make proper payments.
- Letter of Agreement to Bond is a letter or other form issued by a bonding agency licensed to operate by the Government of Canada or Province of Ontario advising that, if the bidder is successful, the bonding agency will issue the required bonds.
- Performance Bond is a bond issued by a surety company executed in connection with a contract and which secures the performance and fulfillment of the undertakings, covenants, terms conditions and agreements contained the contracts.

Consultant: a vendor, who by virtue of a particular expertise, is contracted by Grand Erie to undertake a specific task or assignment that may include, but not limited to, expert advice, guidance, strategic advice, assessment without implementation or consideration for decision making.

Consulting Services: the provision of expertise or strategic advice that is presented for consideration and decision-making.

Purchase Contract: A legally binding agreement between a buyer and a seller that outlines the terms and conditions of a transaction for the purchase of goods or services.

Purchase Order: The purchasing document that is a legal contract and used to formalize a purchasing transaction with a vendor.

Purchase Requisition: A written or electronically produced request in an approved format and duly authorized to obtain goods or services.

Request for Quotation (RFQ): A request for prices on specific goods and/or services from selected vendors which are submitted verbally, in writing or transmitted by facsimile as

specified in the RFQ. The RFQ describes exactly what needs to be purchased and the evaluation is usually made solely on price. RFQs are best suited to products and services that are as standardized as possible.

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. The RFP usually leaves all or part of the precise structure and format of the response to the discretion of the proponents.

Request for Tender (RFT): A document used to request sealed supplier responses for goods and/or services based on a defined need, such as delivery requirements, performance specifications, terms and conditions. A RFT usually focuses the evaluation criteria predominantly on price and delivery requirements.

Tenders may be “invitational” in which three or more suppliers are asked to submit a bid or “open” in which the bid document is available to any supplier that deems itself capable of meeting the needs and specifications defined in the RFT.

Procurement: Procurement is acquisition by any means, including by purchase, rental, lease or conditional sale, of goods, services or construction.

Unauthorized Purchases: When an employee has circumvented one of the approved purchasing methods, such as order goods or services over the phone without having first obtained a purchase order number, or when payment is made with personal funds or credit card. Usually, these actions are followed by attaching the vendor receipt or invoice to a cheque request that is submitted to Business Services for vendor payment or reimbursement.

Vendors of Record (VOR) Agreement: A procurement arrangement that authorizes Grand Erie to select from one or more pre-qualified vendors (also known as suppliers), typically by way of a formal second-stage process, for a defined period on terms and conditions, including pricing, as set out in the particular VOR agreement. VOR arrangements are used to reduce costs to Grand Erie by establishing strategic relationships with a small group of suppliers.

References(s):

- Purchasing Policy (B-06)
- Accessibility Policy (SO-31)
- Accessibility Procedure (SO-031)
- *Broader Public Sector Procurement Directive*
- *Canada-European Union Comprehensive Economic and Trade Agreement*
- *Canadian Free Trade Agreement*
- *Canadian Standards Association*
- Capital Related Fundraising Policy (BU-03)
- Capital Related Fundraising Procedure (BU-003)
- Code of Conduct (Governance Policy #4)
- Code of Conduct Policy (SO-12)
- Disposal of Surplus Damaged or Obsolete Furnishings and Equipment Procedure (FA-021)
- [Education Act, Chapter E.2, Section 217](#)
- *Electrical Safety Authority*
- General Working Bylaw S. 12.3 Signing Authorities
- Green Construction Policy (FA-10)
- Green Construction Procedure (FA-010)
- Hospitality and Food Expenses Procedure (BU-008)
- *Integrated Accessibility Standards Regulation*
- Major Construction Policy (FA-01)
- Major Construction Procedure (FA-001)

- [*Municipal Freedom of Information and Protection of Privacy Act*](#)
- New Construction Policy (FA-02)
- New Construction Procedure (FA-002)
- [*Occupational Health and Safety Act*](#)
- Ontario Public Buyers Association
- Ontario Regulation 612/00
- [*Personal Information Protection and Electronic Documents Act*](#)
- Playground Equipment Procedure (FA-017)
- *Professional Code of Ethics from the Purchasing Management Association of Canada*
- Purchasing Card Program Procedure (BU-009)
- *Workplace Hazardous Materials Information Systems*
- [*Workplace Safety and Insurance Act*](#)