



PROCEDURE

BU-006

PURCHASING	
Superintendent Responsible: Superintendent of Business & Treasurer	Initial Effective Date: 2010/03/22
Last Updated: 2026/09/30	Next Review Date: 2030/09/30

Purpose:

To set out standardized rules and expectations to guide employees on the purchasing process based on the Broader Public Sector Procurement Directive that supports accountability, transparency, value for money, and effective quality service delivery in relation to dollar value expenditures.

Guiding Principles:

The following principles will guide employees in all purchasing activities:

- act in the best interests of Grand Erie and its students when acquiring goods and services;
- maintain an exceptional standard of integrity in all purchasing activities and business relationships;
- act in an open, transparent and honest manner;
- ensure purchasing decisions are fair, objective and focused on achieving value for money;
- not use one's position or authority for personal benefit;
- not accept gifts or other benefits in exchange for business or consideration of business opportunities; and
- avoid and disclose any actual, potential or perceived conflict of interest.

1.0 Administrative Responsibility

- 1.1 The Purchasing Department is responsible for administering Grand Erie's purchasing processes.
- 1.2 Superintendents, Administrators, Senior Managers, Department Managers and Supervisors are responsible for ensuring employees under their supervision are aware of and comply with the Purchasing Policy (BU-06) and this procedure.
- 1.3 This applies to all goods and services purchased for Grand Erie schools, departments, programs and school-related activities, regardless of the funding source.
- 1.4 Purchases made through Grand Erie are for authorized Grand Erie purposes only.
- 1.5 Purchasing processes must not be used to make purchases for the personal use of employees or other individuals.

2.0 Roles and Responsibilities

Roles	Responsibilities	Who
Requisition	Authorize the purchasing department to place an order following approved methods	Employees 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	Individual receiving the goods and services
Payment	Authorize release of payment to the supplier	Accounts Payable role within the finance team

3.0 Approval Schedule

- 3.1 Authority levels identify the approval required for specific dollar values of purchasing. This delegation of authority corresponds to job roles.
- 3.2 Approval of 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 provide approval in writing or by email to the Purchasing Supervisor.
- 3.4 Delegated purchasing authorities are as follows:

Chief Executive Officer or Superintendent of Business and Treasurer	all purchase contracts for goods and services up to \$2,500,000
Senior Manager of Facility Services	facility related contracts with a value up to \$250,000
Senior Managers, Academic Superintendents, Facility Services Division Managers and Purchasing Supervisor	all purchase contracts with a value up to \$75,000
Administrators, Principal Leaders, Academic Coordinators, Teacher Consultants, Facility Services Supervisors, Non-Union Management, Buyer, Health and Safety Officers	all purchase contracts with a value up to \$20,000

Educators, clerical support, custodial/maintenance support, non-union support employees 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.

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 Purchases exceeding petty cash or purchasing card limits require a purchase order or other approved purchasing method. Spending limits for petty cash are \$75 per item and \$100 per transaction.
- 4.3 Spending limits for purchasing cards are set according to the [Purchasing Card Manual](#).

5.0 Unauthorized Purchases

- 5.1 Unauthorized purchases are any commitments or expenditures made outside of established procurement policies, procedures, and delegated authority, or without the required approvals and controls in place at the time of purchase. Examples of unauthorized purchases include, but are not limited to:

- Placing an order with a vendor without first obtaining an approved purchase order, where a purchase order is required.
 - Using a personal credit card to make purchases with the expectation of reimbursement, outside of approved procedures.
 - Committing the Board to a purchase or agreement without appropriate delegated authority.
 - Splitting purchases to avoid approval thresholds or procurement requirements.
- 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, the approval will include an explanation of why the 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 or reimbursement, the employee will be responsible for their own payment.

6.0 **Competitive Process**

- 6.1 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.
- 6.2 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.
- 6.3 The Purchasing Department will coordinate competitive procurement processes. Schools and departments are responsible for providing the information and specifications required to support the procurement. 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 the purchase is within the authority and budget limit of the employee(s).
\$10,000 – \$119,999.99	An invitational quotation process will be conducted.
\$120,000 or more	Purchases that exceed \$120,000 will be made by an open competitive procurement process. The bid document will be advertised on a nationally recognized electronic bulletin board.

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

\$0 – \$119,999.99	An invitational competitive process with the intent of acquiring three (3) bids whenever possible will be conducted
\$120,000 or more	An open competitive procurement process will be conducted.

7.0 **Exceptions**

- 7.1 When it is neither practical nor possible to obtain a minimum of three prices, the Senior 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 the 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 Chief

Executive Officer, Superintendent of Business and Treasurer or Senior Manager of Facility Services may waive this Procedure and authorize the purchase from a single source.

- 7.3 If the procurement request is for strategic consulting services using a non-competitive process in accordance with an applicable exemption under trade agreements, the following written approvals will be obtained prior to sourcing the service.

7.3.1 For any value between \$0 - \$119,999, written approval from the Superintendent is required, and written authority will be submitted to the Purchasing Supervisor.

7.3.2 For a value of \$120,000 or more, written approval from the Board of Trustees will be submitted to the Purchasing Supervisor.

8.0 **Blanket Purchase Orders**

8.1 Blanket purchase orders may be established by the Purchasing Department for frequently used, low-dollar goods and services. They will identify the authorized employee(s), the period for which the purchase order is in effect and the maximum amount permitted per transaction.

8.2 The maximum transaction limits are \$500 for all sites other than Facility Services and \$2,000 for Facility Services.

9.0 **Conflict of Interest**

9.1 A conflict of interest exists when Grand Erie employees or related parties of Grand Erie exercise their duties in a manner that could be, or could be perceived to be, influenced by their personal, financial, or business interests or those of their family or business associates.

9.2 In procurement activities with suppliers, employees will declare a conflict of interest if the circumstance could, or could be perceived to, provide a supplier with an unfair advantage.

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

9.4 School council members are governed by their individual school council's conflict of interest by-laws (as required by *Ontario Regulation 612/00*). Employees will comply with the conflict of interest requirements of the *Education Act*, including section 217.

10.0 **Cooperative Purchasing**

10.1 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 efficiency through shared services.

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

11.0 **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 System (WHMIS) requirements, and *Workplace Safety & Insurance Act* (WSIA).

12.0 **Disposal of Surplus/Obsolete Equipment**

12.1 Furniture and equipment, including donated items, must be disposed of in accordance with Disposal of Surplus Damaged or Obsolete Furnishings and Equipment Procedure (FA-021).

13.0 **Receiving and Inspection of Purchased Goods and Services**

- 13.1 The site/end user is responsible for inspecting purchased goods and/or services in a timely manner to ensure completeness and accuracy.
- 13.2 For purchase orders greater than \$2,500, the end user is required to confirm receipt in accordance with Business Services requirements. Orders must be received through Grand Erie's Enterprise Resource Planning software. Damaged, incomplete or backordered items must not be received in the system until the order is complete and accurate.
- 13.3 Concerns related to purchased goods and/or services or the purchasing process should be directed to the Purchasing Department.

Definitions:

Blanket Purchase Order: A purchase order established for a specific period of time for repetitive, low-dollar goods and services, with a maximum amount permitted per transaction.

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 expert advice, guidance, strategic advice, or assessment for consideration or decision making.

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

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

Purchase Order: The purchasing document that formalizes a purchasing transaction with a vendor and constitutes a legal contract.

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

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

Unauthorized Purchases: Any commitments or expenditures made outside established procurement policies, procedures or delegated authority, or without the required approvals and controls.

Reference(s):

- Purchasing Policy (BU-06)
- *Broader Public Sector Procurement Directive*
- *Canada-European Union Comprehensive Economic and Trade Agreement*
- *Canadian Free Trade Agreement*
- 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](#)
- General Working Bylaw S. 12.3 Signing Authorities
- Purchasing Card Program Procedure (BU-009)
- [Supply Ontario - Buy Ontario Procurement Directive](#)