



File DK-R

PURCHASING

1. Tenders shall be made according to accepted tendering procedures which shall include:
 - a) advertising in the Daily Graphic (Free Press when deemed appropriate) for a minimum of 7 days in advance of the closing date;
 - b) tenders received after the stated closing date/time will be returned unopened;
 - c) detailed specifications for goods and/or services will be stated in the tender or supporting documents;
 - d) sealed, written tenders are to be received by the Board Office by 12:00 p.m. noon on the closing date.
2. Two or more purchase orders for work or material may not be issued for portions of any single transaction in an attempt to circumvent the stated limits.
3. Summaries and recommendations on all tenders shall be made for presentation to the Board at a regular or special meeting for final acceptance.

Procedures for Schools

1. The following dates will apply for submission of school orders to the Board Office:
 - a) November 15 -Requisitions for major items on the appropriate forms, for either tendering or direct order.
 - b) May 1 -Purchase requisitions will be accepted by the Business and Finance Department up until this date. This would normally include all items purchased from school discretionary funds which would not require tendering.

Any requests submitted after May 1 should be arranged in consultation with appropriate Board Office personnel.

2. Purchase requisitions must be approved by the Principal or designate and account coding must be indicated.
3. All pertinent information e.g. suggested supplier, catalogue number, description and estimated cost, shall be supplied to assist the Board Office in obtaining the desired items.
4. Separate requisitions are required for each supplier.
5. Purchase requisitions should normally be made in duplicate with one copy being retained in the school.



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6. Purchase orders will be controlled by the Administrator of Accounts and Purchasing. Purchase orders will be in triplicate and distributed as follows:
 - copy 1: sent to supplier
 - copy 2: sent to school to be compared to supplier invoice. Board Office must be notified immediately of discrepancies.
 - copy 3: filed at Board Office numerically by school.
7. No purchase may be made by a school without an authorized purchase order. The exception is purchases paid from petty cash and school activity accounts. See also DE, DKA.
8. School administration will monitor and control committed expenditures for the purpose of meeting budget allocations.
9. Shipments to schools will be checked against packing slip and invoice. Board Office must be notified immediately of any shortages. Invoices are to be forwarded to the Administrator of Accounts and Purchasing after being signed by the Principal or designate.

Procedure for Operations

1. Purchase orders must be used wherever goods or services are acquired. The purchase order must be approved by the Supervisor of Operations or designate.
2. One copy of the purchase order is sent to the supplier with the price indicated. The second copy is to be attached to a copy of the supplier invoice and filed by location. The 3rd copy is to be compared to the supplier invoice and forwarded with the invoice to the Board Office.
3. All purchasing is to be processed through one designated individual. Supplier invoices are to be approved by the Supervisor of Operations, Assistant Supervisor of Operations or a designated employee other than the purchaser.
4. Small supply items required immediately, where the total cost is less than \$40.00, may be purchased through the petty cash account without a purchase order. Accounting for the petty cash account will be submitted to the Business & Finance Department on a regular basis.
5. Requests for supplies or equipment exceeding budget allocations or for equipment not specified in the Budget must be approved by the Superintendent.
6. Purchases of material or services which are made by contract do not require a purchase order or requisition for each automatic delivery made.



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7. Wherever feasible, purchasing should be done in large quantities, using tenders and price quotes where applicable. Where storage would be a problem, schedule deliveries at intervals throughout the year.

Purchasing Limits

The limits of authority to grant purchase orders are:

Administrator of Accounts & Purchasing	\$2500.00
Stock Clerk	\$1000.00

Purchase orders above these limits must be signed by the Superintendent/Secretary-Treasurer, Manager of Business and Finance or the Supervisor of Operations.