

Purpose/Background

Purchasing competitively and seeking maximum value for expenditures of public funds is an expectation for all Rocky View Schools and departments within RVS. To ensure that open, fair, transparent, and accountable purchasing practices are followed when procuring goods and services, expenditures of public funds must be made in accordance with mandated practices and legislation.

Procedure

1. Identify the appropriate individual authorized to purchase as per Appendix A Purchasing Limits Of Authority (reference chart attached). Only persons with signing authority can authorize a purchase.
 - 1.1 The principal or supervisor is responsible to ensure that staff DO NOT purchase items without authorization, and DO follow appropriate procurement methods for all purchases, including purchases made with school generated funds.
 - 1.2 Purchase authority is not to be confused with budget authority. Purchase authority is the authority to award, or to approve, legally binding purchase agreements (that is, contracts and purchases) on behalf of the public entity (Rocky View School Division No. 41).
 - 1.2.1 A purchase order is a legally binding contract while a purchase requisition, which initiates the purchase order and is for internal use only within RVS, is not.
2. The principal or supervisor must ensure authorized staff understand the specific limit of their authority.
3. All staff must have an awareness of the requisitioning, tracking, receiving, installation and invoicing processes for the particular type of goods or services being ordered.
 - 3.1 Administrative Procedure AP5405 must be followed for School Initiated changes to school facilities or grounds.
 - 3.2 Required use of accounting and purchasing software – PowerSchool Atrieve
 - 3.3 Asset Planner software - record of request, status, tracking, primarily for service requests
4. Principals or supervisors must ensure purchases are within the defined budget limits and allocations.
5. Specific supplies and services, regardless of value, must be purchased through the Supply Management Department. This would include, but is not limited to:
 - 5.1 Items that exceed \$5,000 in value, (requirements exist for depreciation, tracking, life cycle reporting, and disposal);
 - 5.2 Contracts in excess of one year;
 - 5.3 Professional service contracts;
 - 5.4 Actions, items, or purchases that may place RVS at risk of penalties or liabilities;
 - 5.5 Foreign purchases;
 - 5.6 Technology including division owned mobility devices (cell phones, iPads etc.); computers, laptops, iPads, switches, wireless access points, copiers/multi-function printers and other items connected to the network;
 - 5.7 Telephone and Public Address Systems;
 - 5.8 Surveillance devices;
 - 5.9 Services for repairs to equipment, appliances, furniture and fixtures;
 - 5.10 Services normally provided through the Maintenance or Grounds Department(s);
 - 5.11 Software Licensing Agreements;
 - 5.12 Hazardous materials;
 - 5.13 Furniture and equipment such as:

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- 5.13.1 Program Specific Equipment for CTS, Band, Robotics and Auto Programs (excluding supply items and small hand tools)
 - 5.13.2 Major Appliances;
 - 5.13.3 Commercial Foods Equipment;
 - 5.13.4 Fitness Equipment;
 - 5.13.5 Playground Equipment (with authorization from the Grounds Department);
 - 5.13.6 Whiteboards, bulletin boards, lockers, display cases or other items attached to facility walls.
6. Contracts and/or Agreements are to be reviewed and approved by the Associate Superintendent of Business and Operations prior to acceptance, unless specifically exempted in this agreement. Please note that contracts requiring insurance and/or those waiving student rights, may not be exempted regardless of the contract type, and must be reviewed and approved by the Associate Superintendent of Business and Operations prior to acceptance.
 7. Any purchase exceeding \$5,000 (\$50,000 for Extracurricular or Professional Learning) requiring an agreement, contract or similar arrangement obligating the division to future services (greater than one year) must have a purchase order (PO) itemizing the value and/or rate, term and any other pertinent information specific to the contract. If the value of the contract is under \$50,000 it may be approved by the school principal and entered into Atrieve for payment without any further approval, no PO necessary. If the contract has specific insurance requirements see clause 6 above as further review of the agreement is required.
 8. Purchasing cards are the preferred method of purchasing and paying for small dollar transactions. See AP5224 Small Purchases and PCards.
 9. Any purchase intended to bypass the division's obligation to the competitive bidding process is prohibited. (Example: splitting orders to avoid authorized dollar thresholds).

References:

- School Act
- Freedom of Information and Protection of Privacy Act
- School Buildings and Tendering Regulation 383/88
- Agreement on Internal Trade; Annex 502.4
- Trade, Investment and Labour Mobility Agreement
- New West Partnership Trade Agreement
- CFTA (Canada Free Trade Agreement)
- SRB Atrieve ERP (electronic requisition process)
- Asset Planner for Service Requests
- RVS Online Order System Contracts
- RVS Public Sector Purchasing Code of Ethics
- Flow Chart for Procurement Process
- Supply Management Handbook
- RVS Warehouse Supply Catalogue
- BMO Purchasing Card Handbook
- RVS AF5201-A Purchasing Authority at Schools
- RVS AF5201-B Combination Lock Order – Student Lockers

- RVS AF5201- C Signature Form

Appendix A – PURCHASING LIMITS OF AUTHORITY

The following chart outlines the purchasing limits assigned to designated staff, following the appropriate purchasing practices of the Division:

(* PCards should be utilized whenever possible for purchases under \$5,000)

EXPENDITURE AMOUNTS	TYPES OF GOODS AND SERVICES	ORDER / PROCUREMENT / PROCESSING METHOD	AUTHORIZED PERSONNEL
\$0 - \$5000	Purchases of Equipment Supplies and Services	PCard*, IEW*** or ATRIEVE Requisition	Principals and other school based personnel, as designated by the Principal; or Education Centre personnel as designated by the Superintendent or an Associate Superintendent
\$0 - \$50,000 agreement not to exceed one year	Extra or co-curricular events**, PL registrations, awards	PCard*, IEW*** or ATRIEVE Requisition	School Principals
\$0 - \$30,000	Purchases of Equipment, Supplies and Services	PCard* or ATRIEVE Requisition	Procurement Specialist
\$0 - \$50,000	Purchases of Equipment, Supplies and Services	PCard* or ATRIEVE Requisition	Senior Procurement Specialist
\$0 - \$75,000	Purchases of Equipment, Supplies and Services	PCard* or ATRIEVE Requisition	Supervisor of Supply Management
\$0 - \$100,000	Purchases of Equipment, Supplies and Services	PCard* or ATRIEVE Requisition	Director of Finance
\$0 - \$25,000	Purchases of Equipment, Supplies and Services	PCard* or ATRIEVE Requisition	Director of Maintenance and Grounds or Facility Planning; Supervisor of Maintenance or Caretaking; Grounds, Maintenance and Caretaking Coordinators
\$0 - \$10,000	Purchases of Equipment, Supplies and Services	PCard* or ATRIEVE Requisition	Area Directors
\$0 - \$100,000	Purchases of Equipment, Supplies and Services	PCard* or ATRIEVE Requisition	Associate Superintendents
\$0 - \$200,000	Purchases of Equipment, Supplies and Services	PCard* or ATRIEVE Requisition	Associate Superintendent of Business and Operations OR Superintendent of Schools
Building Construction \$200,000. All other purchases, no limit. Purchases over \$200,000 must be reported to Board	Building Construction	Purchase Requisition	

Definitions:

***Pcard:** Rocky View Schools corporate purchasing card (Currently BMO MasterCard)

****Extra or Co-curricular events:** Expenditures related to graduations, clubs, sports teams, intramurals, or other programs designed to broaden scholastic experience. Includes charges for materials, activities, and travel associated with the club/team, etc. All Contracts and Agreements requiring insurance **MUST** be reviewed by Business and Operations prior to signing to ensure insurance requirements can be met. Use Atrieve Form for Certificate of Insurance request.

*****IEW (Invoice Entry Web)** – Expense authorization and payment method for expenditures that cannot be purchased using a pcard.