


Procedure Name:	PURCHASING	 coast mountain college
Approved By:	President's Council	
Approval Date:	January 27, 2015	
Next Scheduled Renewal Date:	December 2019	
Procedure Holder:	VP, Corporate	
Operational Lead:	Director, Finance	
Procedure Number:	FIN-005P	

PURCHASING PROCEDURE

1.00 PURPOSE

2.00 The purpose of this procedure is to outline the process of providing Coast Mountain College (CMTN) with a best-value and cost-effective supply system with an innovative institutional focus.

3.00 DEFINITIONS

3.1 None

4.00 CONFIDENTIALITY

4.1 All terms and conditions of bids, contracts, and purchases relating to vendors and/or contractors are confidential and are not to be disclosed to any third party or competing vendor and/or contractor.

5.00 DELEGATION OF PURCHASING AUTHORITY

5.1 CMTN has a decentralized system where budget officers are responsible for sourcing and pricing purchases for their departments within their approval limits.

5.2 As set out below, CMTN will get competitive prices where practical for goods and services, except when the need is critical and delays would not be in the best interest of College operations, or where the materials and services (excluding construction) are unique.

6.00 GOODS AND SERVICES

6.1 Construction services are the responsibility of the Director of Facilities.

\$0 - \$5,000	Direct purchase by Budget Officer
\$5,000 - \$75,000	Budget Officer must get 3 written quotes
\$75,000 or greater	Public competitive bids issued by Purchasing Department

7.00 CONSTRUCTION SERVICES

7.1 Construction services are the responsibility of the Director of Facilities.

\$0 - \$ 5,000	Direct purchase by Director of Facilities
\$5,000 - \$200,000	Director of Facilities must get 3 written quotes
\$200,000 or greater	Public competitive bids issued by Purchasing Department

8.00 EXCEPTIONS TO TENDER/RFP PROCESS

8.1 **Sole Source Justification:** An item or service may be sourced from a sole vendor if there is only one known vendor.

8.2 **Emergency Purchases:** In an emergency, where staff, students, or public safety is in question, or to prevent damage to College assets, a dean, director, manager (or designate) may authorize the immediate purchase of any item or service without complying with the tender/RFP process outlined in this policy.

9.00 RELATED POLICIES, PROCEDURES, AND SUPPORTING DOCUMENTS

9.1 [FIN-005, Purchasing Policy](#)

10.00 HISTORY

Created/Revised/ Reviewed	Date	Author's Name and Role	Approved By
Created	Jan 27, 2015		President's Council

Appendix A: Purchasing Process

1.00 PURCHASING AMOUNTS AND DETAILS

Under \$5,000	A direct Purchase Order may be issued. It is expected that managers have researched their product to ensure that the best value is received. This means that several quotes should be received and retained in your files.
\$5,000-\$75,000	Three written quotes are required. This should be noted in the Comments field of the requisition and the quotes scanned to Purchasing to be filed electronically. If for any reason you are not able to get three quotes or if the lowest quote was not selected, then the Comments must indicate why. There needs to be a very good reason.
\$75,000 and Greater	Tenders required – posted public bid as per North West Partnership Trade Agreement (NWPTA) requirements.

- 1.1 Above amounts are before tax. Threshold amounts are meant for the value of the entire purchase from a single vendor, not individual items. The aggregate value over the entire contract term (i.e., a contract value of \$20,000 per year for 5 years has an aggregate value of \$100,000 and thus would need to go to tender).
- 1.2 Printed comments should be used when you want the comment to appear on the purchase order that is submitted to the vendor. If you have an email address that the purchase order should go to, then please note it here; otherwise the purchase order will be sent via fax.
- 1.3 Comments are not printed on the purchase order. Important information other than what is noted above can be typed here. The approver sees this information on their email notification.
- 1.4 If items are purchased for resale to students or meet the criteria for being exempt from PST then this needs to be noted on the requisition. Please see Exemptions under the following link, [BC PST Publications](#). For further assistance contact the Purchaser.

2.00 BUDGET OFFICER RESPONSIBILITIES

- 2.1 For all requests for procurement, Budget Officers or Designate will complete the Electronic Purchase Requisition. The Requisition must include:
 - a) account number
 - b) budget officer approval
 - c) complete description
 - d) specifications
 - e) price
 - f) quantity required.

Incomplete requisitions will not be processed.
- 2.2 Quotations and budget amounts must be kept confidential.
- 2.3 Requests about competitions will be referred to the Purchasing Department or the Freedom of Information authority of the College.

3.00 PURCHASING DEPARTMENT RESPONSIBILITIES

3.1 The Purchasing Department is responsible for:

- a) identifying, planning, negotiating, establishing, managing, and fully documenting all College procurement arrangements
- b) providing all potential suppliers involved in a competitive bid process with identical information on which to base their responses
- c) maintaining and making available to employees a list of preferred suppliers as required for specific goods or services
- d) maintaining adequate contract documentation for all phases of the procurement process, including planning, solicitation, award, management, amendments, payment schedules, progress reports, and contract evaluations
- e) ensuring that adequate receiving processes are in place to confirm that goods and services are received as ordered.

4.00 GENERAL INFORMATION

4.1 As a general rule, CMTN will not enter into purchasing contracts with employees or board members or members of their immediate families.

4.2 To avoid a possible conflict of interest, any employee who has a financial or other interest in a supplier company, either directly or indirectly through members of his or her immediate family, should report such financial or other interests in writing to the Purchasing Committee and the Vice-President, Corporate Services who will determine whether the interest is sufficient to disqualify the vendor.

4.3 CMTN employees must not accept gifts, either in kind or in money, or in excessive entertainment from a vendor or a potential vendor.

- a) Gifts include any items offered to an employee or their family which have intrinsic value or are not obviously in the form of advertising.
- b) Excessive entertainment includes, but is not restricted to, transportation of other than a business nature and overnight accommodation.
- c) Free samples must not be accepted unless the item has little intrinsic value.