

# Purchasing Directives

## **C 3001-1 Process & Thresholds**

Purchases of Goods and Services shall be purchased using the applicable process as per Table 1:  
Processes for the purchases of Goods and Services

All Purchases over \$50,000 (other than those excluded in section C3001-4) must be planned for and identified to Purchasing by the responsible budget officers in sufficient time so as to allow the appropriate competitive process to be completed.

Splitting of requisitions or contract as well as the use of contract extensions shall not be used to avoid open competition thresholds.

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**Table 1: Processes for the purchases of Goods and Services**

| Realization of need |  |   |
|---------------------|--|---|
|                     | Consultation with Purchasing Department if complex or above thresholds or long lead times possible | <i>Responsibility - Initiator Authority – n/a<br/>Consultation – Purchasing Information – Budget Officer</i>                |
|                     | Consultation with Technical Authority if required  | <i>Responsibility - Initiator Authority – Technical Authority<br/>Consultation – Technical Information – Budget Officer</i> |



| Establish Purchasing Process to be Used based on Thresholds                        |  |   |  |   |
|--|--|---|--|---|
| Office/<br>Stationery<br>Supplies  | Goods/Services other than Office Supplies        |   |  |   |
|  | <\$2,000 – Or Lesser of \$5,000 and CCard limit. | Estimate >\$2,000 and <u>not</u> within CCard limit-  |  |   |
| Ordered at Eway.ca with Purchase Requisition sent to Purchasing for final approval | Direct Purchase (no quotes required)*            | Purchase Requisition prepared for and authorized by Budget Officer. Requisition authorizing budgetary spend provided to Purchasing Department for procurement |  | <i>Responsibility - Initiator Authority – Budget Officer<br/>Consultation – Budget Officer<br/>Information – Purchasing</i> |

\*The Purchase Requisition process may also be used for these goods or services at the discretion of the originating Budget Officer. The use of direct purchases or CCards are optional depending upon the Budget Officer.



| Competitive Process required based on Thresholds |  |  |   |   |  |  |
|--|--|--|---|---|--|--|
| Office/<br>Stationery<br>Supplies<br>Threshold   | Goods/Services other than Office Supplies        |  |   |   |  |  |
|  | <\$2,000 – Or Lesser of \$5,000 and CCard limit. | Estimate >\$2,000 and <u>not</u> within CCard limit- |   |   |  |  |
|  |  | Up to \$10,000                                       | >\$10,000 and <\$50,000   | >\$50,000 or Construction* > \$100,000                                | >\$75,000 or Construction* > \$200,000 |  |
| N/A  | N/A  | Up to 3 written Quotes                               | Minimum 3 written quotes or RFP (Direct Invite or posted on BCBid) ** | ITT (quotes) or Direct Invite RFP or RFP or ITT published on BCBid ** | RFP published on BCBid                 | <i>Responsibility - Purchasing Authority – Purchasing<br/>Consultation – Budget Officer<br/>Information – Budget Officer</i> |

\* Construction means a construction, reconstruction, demolition, repair or renovation of a building, structure or other civil engineering or architectural work and includes site preparation, excavation, drilling, seismic investigation, the supply of products and materials, the supply of equipment and machinery if they are included in and incidental to the construction, and the installation and repair of fixtures of a building, structure or other civil engineering or architectural work, but does not include professional consulting services related to the construction contract unless they are included in the procurement (New West Partnership Trade Agreement).

\*\* Where there is a choice of competitive arrangements, the Manager of Purchasing will determine the methodology in consultation with the budget officer considering qualitative requirements.

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## **C3001-2 Purchasing Department Responsibilities**

1. Identifying, planning, negotiating, establishing, managing and fully documenting all College procurement arrangements.
2. Providing all potential suppliers involved in a competitive bid process with identical information on which to base their responses.
3. Maintaining and making available to employees a list of preferred suppliers as required for specific goods or services.
4. Maintaining adequate contract documentation for all phases of the procurement process, including planning, solicitation, award, management, amendments, payment schedules, progress reports and contract evaluations.
5. Ensuring that adequate receiving processes are in place to confirm that goods and services are received as ordered.
6. Notifying all suppliers doing business with the College of their obligations under privacy legislation for public bodies and companies.

## **C3001-3 Employee & Budget Officer Responsibilities**

1. Employees must ensure the purchases are authorized by the Budget Officer responsible in accordance with Policy B1016 – Signing Authority.
2. Budget Officers are responsible for notifying the Purchasing Department of planned for high dollar or complex purchases in sufficient time as to allow for scheduling of resources and an appropriate procurement process.
3. For all requests for procurement other than those noted as Exceptions, Budget Officers will authorize a Requisition Form and submit it to the Purchasing Department. The Requisition must include the following: index code, account number, Budget Officer signature, complete description, specifications and quantity required. Incomplete requisitions will not be processed.
4. Employees will consult with, and obtain the approval of, a Technical Authority as required.
5. All changes, including the quantity, specifications and material returns must be done through the Purchasing Department.
6. Employees who are researching a product may request an estimated cost from the sales representative of a supplier for budgetary purposes only. The Purchasing Department will request the official quotation. When researching a product, employees must provide identical information to all potential suppliers. The Purchasing Department will obtain/require quotations as indicated in the Procurement Directives.
7. Quotations amounts must be kept confidential.
8. Requests about competitions will be referred to the Purchasing Department or the Freedom of Information authority of the College.

## **Purchasing Directives**

### **C3001-4 Exceptions**

The following items will not require the submission of a Purchase Requisition to the Purchasing Department and selection through a competitive bid process:

1. Services provided under a contract of employment.
2. Goods for resale by the Bookstore.
3. Books and Subscriptions by the Library.
4. Individual travel and related expenses for College business.
5. Banking and payment transaction services.
6. Investment management services.
7. Utilities.
8. Memberships.
9. Audit.
10. Tax consulting services.
11. Rental and lease of real property.
12. Hostings, meetings and conference expenses.
13. Petty cash reimbursements.
14. Purchases under a College-issued commercial card.
15. Engaging artistic personnel for Theatre Arts (Studio 58).
16. Purchases made under a blanket Purchase Order or supplier service agreement.
17. Exceptions as provided for in the New West Partnership trade Agreement.

### **C3001-5 Technical Authority**

The Director, Financial Services will confer Technical Authority upon departments as appropriate.

The Technical Authority must be consulted prior to purchase in the following instances:

1. Where initial costs of items being purchased may not reflect the long-term costs of those items due to additional support requirements, technical integration or maintenance contract costs not included in the purchase price.
2. Purchase of items that are furniture, fixtures, leasehold improvements, computer equipment, audio visual equipment, telephone equipment, software or academic reference material held by the Library.
3. Purchase of items that interact with or have a significant impact on the College's physical or technical infrastructure (for example, any item that affects the heat load, energy consumption, electrical requirements or network infrastructure of the College).
4. Purchase of items that will represent the College to external parties or use the College logo or design.

A list of the Technical Authorities, designated employee contacts and areas of responsibility will be maintained by the Purchasing Department and made available to all College employees. The current Technical Authorities are as provided in the following table

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**Table 2: Technical Authorities**

| Technical Authority Area     | Items that require technical approval   | Excluded   | Contact Person/Authorizing individual   | Rationale  |
|------------------------------|---|--|---|--|
| Information technology       | Computers and peripheral equipment  | USB sticks, Printer Cartridges (must be obtained through Purchasing) | Associate Director IT - Operations or delegate  | Items that interface with the College’s computer system will require vetting by IT to ensure that they are compatible with existing and anticipated future infrastructure. |
|                              | Audio Visual equipment  |  | Associate Director IT - Operations or delegate  |  |
|                              | Telephone equipment   |  | Associate Director IT - Operations or delegate  | Additionally, maintenance issues will have to be considered where IT involvement will be required for future maintenance and upgrades.                                     |
|                              | Software licenses   |  | Associate Director IT - Operations  |  |
|                              | Desktop related items from enterprise systems and SaaS software   |  | Associate Director IT – Development   |  |
| Facilities                   | Fixtures and equipment that meet one of the following:  | Electrical equipment under 60W                                       | Associate Director, Facilities or Supervisor Facilities or Architectural Technologist or Manager, Safety, Security and Emergency Management | Items that affect the draw of electrical power or impact the heat load will have ripple effect on the building heat elsewhere.   |
|                              | – affect the heat load;   |  |   | To reduce the potential for electrical fire caused by excessive loads.   |
|                              | – significantly affect energy consumption of the College;   |  |   | To reduce potential for increased maintenance costs by ensuring total cost of ownership is considered.   |
|                              | – impact maintenance of College infrastructure;   |  |   |  |
|                              | – may require additional electrical service or affect HVAC requirement.   |  |   |  |
|                              | Furniture   |  |   |  |
|                              | Leasehold/Capital improvements  |  |   |  |
| Library                      | Purchase of academic material such as books, journals, videos or databases, whether physical or electronic, that will be made available on a distributed basis. | None   | Director Academic Innovation or Coordinator, Technical Services   | Often the Library can obtain preferred pricing on these items and make them available to all students and faculty at the same time.  |
|                              |   |  | <b>NOTE:</b> Purchase Requisitions (LR) with approval signatures come directly to the Library.  | Purchase records can be maintained by the Library to avoid duplication and related costs.  |
| Communications and Marketing | Items including print that will represent the College to external parties or bear the College logo or design  | None   | Manager Communications and Marketing  | The College logo or design should be consistent to maintain brand recognition.   |

Where a Technical Authority determines that a class of items is sufficiently standardized and does not require approval, the Authority will provide a listing of such classes for publication and distribution to College employees.

Items purchased as standard items will receive limited support from Technical Authorities in the case where they are not compatible with College infrastructure.

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## C3001-6 Commercial Card

### C3001-6.1 Distribution and Dollar Limits

Commercial cards may only be distributed by current employees of the College.

- a. Employees of the College may apply for a Commercial Card by submitting an application form to their Budget Officer.
- b. Budget Officers will recommend which of their employees should be provided with a Commercial card.
- c. The Director, Financial Services or delegate will review all applications and has the authority to issue Commercial Cards, and to approve any exceptions to the transaction limits requested by the Budget Officer.
- d. A Commercial card will not be released until the applicant attends training sessions provided by the Purchasing Department, confirms that they understand the procedures for use of the Commercial Card, and agrees to the terms of use of the card.
- e. Standard daily and monthly transaction limits for the Commercial Cards will be set by Financial Services and published by the Purchasing Department.
- f. The Director, Financial Services may at their sole discretion and at any time revoke a Commercial Card and the associated privileges thereunder.

### C3001-6.2 Restrictions

The following usage and expenditures are prohibited. Any such usage or expenditure will result in the immediate revocation of the Commercial Card.

- a. Splitting of transactions by obtaining multiple receipts or invoices for a single order in order to circumvent transaction limits.
- b. Sharing of personally assigned Commercial cards or Personal Identification Numbers associated with the Commercial card.
- c. Transactions requiring approval of a Technical Authority. (e.g. furniture, computer equipment or parts, software or advertising).
- d. Cash advances.
- e. Personal purchases.
- f. Alcoholic beverages.
- g. Gambling.
- h. Illegal activities.
- i. Hiring or payment of temporary staff.
- j. Rental or leasing of vehicles for personal use.
- k. Cell phone airtime charges.

### C3001-6.3 Receipts

- a. Commercial Cardholders will obtain and upload an electronic copy of the receipts with their monthly statement for all transactions.
- b. The original copy of the receipt may only be destroyed after the Approver approves the relative monthly statement.

Reference: Policy C3001