

# **POLICY 240**

## **Purchasing and Procurement**

### **1.0 Policy Statement**

The Ontario Public School Boards' Association (OPSBA) is committed to transparent purchasing and procurement practices that are ethical, equitable, professional, accessible, and accountable.

### **2.0 Objective**

To guide OPSBA purchasing and procurement practices.

### **3.0 Application and Scope**

This policy applies to all individuals authorized to make purchases and or procure services for OPSBA. This includes but is not limited to the purchasing or procurement of materials, equipment, supplies and services. Examples include; office supplies, hardware and software, communication devices and plans, graphic design, and printing.

To support environmental sustainability and limit carbon footprint, purchasing staff and end user departments will strive to source, promote and support, green, smart, environmentally friendly products, vendors and services.

#### **3.1 Guiding Principles**

- a) Employees and contract employees involved with purchasing and procuring must act, and be seen to act, with integrity and professionalism
- b) Honesty, care, and due diligence must be integral to all purchasing and procurement activities
- c) Confidential information must be safeguarded
- d) Purchasing and procurement activities must be accountable and achieve best value for money. Activities could include requests for proposals (RFPs), tenders or quotations
- e) Consideration should include not only the price of goods or services but also quality, delivery, service, supplier diversity (E.g., underrepresented groups), warranty, and reliability of the vendor

- f) Decisions should take into consideration how to avoid duplication, waste, and obsolescence and all obligations under the *Ontario Human Rights Code*, *Ontario Health and Safety Act*, and *Accessibility for Ontarians with Disabilities Act*.

### **3.2 Approval Authority**

- a) The Executive Director shall ensure operational costs are reflected in the OPSBA Budget
- b) All purchases are subject to sufficient funds being available for that purpose in the budget. The Financial Officer is to be made aware of the purchases, and of the approval by the Executive Director
- c) Any purchase of materials or services over \$1,000.00 must be approved by the Executive Director

### **3.3 Contracts**

- a) Agreements between OPSBA and suppliers of various products and services must be formally defined in a signed written contract/agreement/letter of understanding. Consultation with the Executive Director and Financial Officer is required
- b) All contracts must contain appropriate cancellation or termination clauses, and comply with human rights requirements and workplace safety obligations
- c) All contracts must define the term of the agreement, and any options to extend the agreement. Extension of any agreement requires approval by the Executive Director
- d) No contract for supplies or services may have a term longer than five years without a review of the services
- e) Contracts should include a dispute resolution process, where appropriate
- f) Contracts where expenses are a consideration may explicitly state what expenses may be claimed. Expenses claimed as part of the agreement should be identified on a separate section of the invoice with all receipts attached
- g) The Executive Director or designate is the signing authority for all contracts except those related to their employment where the President or designate will have signing authority

### **3.4 Collaborative Services**

- a) OPSBA is committed to working collaboratively with the Ontario Education Services Corporation (OESC) and other broader public sector organizations, as applicable, to develop and share services

### **3.5 Special Considerations**

- a) Where possible and practical and taking into consideration quality, service and price, preference shall be given to service providers, businesses and products that are Canadian/made in Canada, including Indigenous and equity-seeking providers/businesses

### **3.6 Records Management**

- a) For reporting and auditing purposes, all procurement documentation, including contracts, receipts and any other pertinent information, must be retained in a recoverable form for a period of seven years
- b) Confidential or commercially sensitive information must be kept secure

## **4.0 Responsibilities**

### 4.1 Board of Directors:

- a) Approve the OPSBA annual operating budget

### 4.2 Executive Director:

- a) Provide regular updates on the OPSBA budget to the Board of Directors
- b) Engage in periodic evaluation of suppliers, services, and/or consultants to ensure agreed upon obligations are being fully met
- c) Address and document any performance issues
- d) Ensure the completion of all contracts as approved

## **5.0 References**

*Ontario Human Rights Code*

*Ontario Health and Safety Act*

*Accessibility for Ontarians with Disabilities Act*

## **6.0 History and Review**

6.1 Approved: October 1, 2022

6.2 Next review: 2026