

POLICY AND PROCEDURE	
Policy/Procedure	Purchasing and Procurement
Original Creation Date	08/21/1996
Policy Approved by	Susan Hall (Chief Financial Officer)
Policy Effective	06/02/2021
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Policy Review	07/20/2023
Policy Owner	Patty Meneilley (Manager, Finance)
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Policy Statement
<p>The purchase of goods and services by Pathways to Independence is in accordance with Generally Accepted Accounting Principles, legal requirements, ministry guidelines, and sound financial practices.</p> <p>Pathways to Independence will adhere to the Ontario broader public sector (BPS) Procurement Directive issued by Management Board of Cabinet, Effective July 1, 2011. This Directive applies to all designated broader public sector organizations as provided for under section 12 of the Broader Public Sector Accountability Act, 2010.</p> <p>The purpose of the Directive is to:</p> <ul style="list-style-type: none"> • Ensure that publicly funded goods and services, including construction, consulting services, and information technology, are acquired by BPS organizations through a process that is open, fair and transparent; • Outline responsibilities of BPS organizations throughout each stage of the procurement process; • Ensure that the procurement processes are managed consistently throughout the BPS. <p>The complete Directive may be found in Appendix C.</p>
Scope
<p>This policy applies to all employees of Pathways to Independence.</p>
Definitions
<p>Conflict of Interest A conflict of interest is defined as a conflict between the employee's personal and/or business interest and his/her responsibility as an employee. This includes actual or perceived conflict.</p> <p>Good and Services All goods and/or services including construction, consulting services and information technology.</p> <p>Consulting Services The provision of expertise or strategic advice that is presented for consideration and decision making.</p> <p>Information Technology The equipment, software, services and processes used to create, store, process, communicate and manage information.</p>
Policy

\$0 up to but not including \$100,000

A minimum of three (3) quotations is recommended for all non-consulting purchases having a value of \$10,000 or more from a qualified supplier.

This does not preclude the need for purchasing to ensure that the best end cost is obtained for purchases under \$10,000.

Where 3 quotations are not possible to obtain, the file will be supported by a document detailing the reason for not obtaining the required quotations.

It is recognized that other instances may preclude the ability to obtain quotations such as single source items, urgency of need and the like. In all such cases the file will be supported by a document detailing the reason for not obtaining quotations.

Written Quotations Request:

Quotes must be supported with a written confirmation of the quote for orders valued at \$10,000 or more. In the case of project/construction work, \$10,000 or more, shall be recorded on a Quotation Comparative Bid sheet (see Appendix A) that shall be attached to the original requisition to serve as backup documentation.

Volume purchase agreement, services, capital equipment orders and contracts require written quotations. Written quotations may also be requested whenever permanent documentation is advisable.

Purchases of Consulting Services of any Amount:

Procurement of consulting services will be obtained through an invitational/open competitive process in accordance with BPS requirements.

Purchases over \$100,000

Purchases over \$100,000 must first be approved by Pathways to Independence Board of Directors.

Purchases of this nature will be obtained through an open competitive process in accordance with the BPS Procurement Policies and Procedures (Mandatory Requirements) July 2011.

Procedure

Not Applicable

Appendices

Quotations and Comparative Bid Sheet- Appendix A

Sample Form Letter- Appendix B

Broader Public Sector Procurement Directive- Appendix C:

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