



<b>Title</b>	Procurement Policy and Guidelines		
<b>Number</b>	17/02	<b>Date</b>	June 05, 2017
<b>Revised</b>			
<b>Preamble</b>			
<p>Procurement or procurement activities, regardless of the nature or value of the goods or services being acquired, involve the Library entering into legally binding relationships with suppliers.</p> <p>It is essential that employees ensure that consistent ethical business practices are followed and that the appropriate documentation is created to reflect the nature and substance of the business relationship and purchasing commitment being established.</p>			
<b>Policy</b>			
<p>In all purchasing, the policy should be to obtain the overall best value. This involves numerous factors, including:</p> <ul style="list-style-type: none"> <li>• the quality and reliability of the goods and/or services</li> <li>• the terms and conditions of the purchase, such as delivery terms and the possibility of volume discounts</li> <li>• the total cost of the purchase (which, in turn, could lead to additional duty/taxes, foreign currency exchange premiums, or affect delivery costs, maintenance costs, etc.)</li> <li>• provide best value for each dollar spent while taking into consideration purchasing as much as possible locally.</li> </ul>			

## Purchasing Guidelines

1. Acquisition is \$9,999 or less
  - It is prudent to obtain more than one quote for goods or services.
  - Purchases of goods and/or services that have an aggregate value of less than \$10,000 can proceed with their purchase without obtaining a quote if:
    - the Library Director has given the purchaser authorization to procure in this manner; and
    - the aggregate (total anticipated spend for the goods or service, over a 12 month period) does not exceed \$9,999 (excluding GST).
2. Acquisition is between \$10,000 and \$24,999
  - Purchases of goods and/or services that have an aggregate value of \$10,000 or more, but less than \$24,999 should, where practical and appropriate, use best efforts to obtain a minimum of three quotes, with a minimum of one local quote where possible.
  - Documentation, including quotes received, should be kept for 3 years after selection made.
3. Acquisition greater than \$25,000 but less than \$74,999
  - Purchases of goods and/or services that have an aggregate value of \$25,000 or more, but less than \$74,999 should obtain a minimum of three quotes if there are three qualified vendors, with a minimum of one local quote where possible.
  - Documentation, including quotes received, should be kept for 3 years after selection made especially if the lowest quote is not selected.
4. Acquisition greater than \$75,000
  - Under the New West Partnership Trade Agreement (NWPTA), goods and services valued at \$75,000 or more must be procured through an open public competition process. To meet this requirement, competitive procurement offerings are posted on the Alberta Purchasing Connection (APC) website, with a minimum of one local quote where possible.
  - All documentation should be kept for 7 years after acquisition made.
5. Sole-source acquisitions
  - Where no competitive market exists, by reason of the unique nature of the goods and services requested, the purchaser may proceed with the purchase without obtaining three quotes.
  - Purchaser should negotiate the best price possible with the sole-source vendor.

6. Government of Alberta Standing Offers

- The Government of Alberta has made available a wide variety of their standing offer agreements. The Library may leverage these opportunities without requesting obtaining quotes, as the pricing is already competitive. An example of a Government of Alberta Standing Offer is Grand & Toy pricing for office supplies.

**Requesting and Evaluating Quotes**

1. The description of the goods or services required must be clear, unambiguous and concise.
2. Evaluation and supplier selection should be based on quantitative criteria. Prior to requesting quotes, weights or measures will need to be assigned to the various factors to select the most appropriate supplier.
3. Once the supplier is chosen, the purchaser must notify all vendors that the opportunity was awarded and thank them for supplying a quote.

**Approval**

**Signature**

Renetta Peddle  
Board Chair