



Wakefield Elementary School Procurement Policy

Purpose

The Wakefield Elementary School's Parent Participation Organization (PPO) and other parent volunteers frequently organize fundraising and social events throughout the year. From time to time, it will be necessary to purchase goods or acquire services to support these events.

Given its mission and its core values, the School has put in place this policy to:

- Ensure a fair and transparent process
- Obtain the best value for money
- Minimize the environmental impact of these activities
- Support local economic development

Application

This policy applies to the procurement of goods and services valued over \$100 that cannot be provided by the school itself and are not otherwise covered by the school's budget as outlined in the WQSB procurement policy.

Definitions

Procurement means buying, purchasing, renting, leasing, or otherwise acquiring any supplies, services, including professional services. It also includes all functions that pertain to obtaining any supply or service including description of requirements, selection and solicitation of sources, preparation and award of contract, and all phases of contract administration.

Procedure

It is expected that a small group of volunteers (minimum of three) will solicit and evaluate proposals.

a) Request for Proposals

It is incumbent on volunteers to seek out potential suppliers of goods and services and to provide those interested with a statement of requirements and a Request for Proposals form as well as a reasonable due date and contact information. All suppliers that express an interest in working with the school to develop or deliver an event will be given the opportunity to submit proposals (Annex A: Request for Proposal Form) and every effort should be made to acquire a minimum of three proposals.

b) The Selection Process

Parent volunteers will first review the proposals in detail separately and in confidence and complete an assessment form (Annex B: Proposal Evaluation Form). Once individual assessments are completed, the group will meet as a whole to develop a recommendation based on a final evaluation and ranking for each supplier. Based on the results of the assessment process, a recommendation will be made to the Governing Board (GB).

The GB will discuss the recommendation and make a final decision by vote.

At a minimum, all proposals will be assessed using the following criteria:

- Alignment with School's Mission, Values and Policies (e.g., community orientation, Management of Life Threatening Allergies Policy, environmental focus, etc.)

- Quality of Goods and Services
- Corporate Capacity to Deliver
- Environmental Impact for Services Offered
- Cost of Goods and Services

c) Communication with Suppliers

Once a final decision is made by GB, a parent volunteer will contact the winning supplier in writing (letter or email) within 24 hours. If the supplier is unable to meet its commitments as outlined in its proposal, the next best supplier, as determined by the results of the formal assessment process, will be contacted.

Questions or concerns regarding supplier registration or invoicing will be redirected to the school's administrative staff.

There is no appeal process but feedback about a supplier's proposal can be provided by the parent volunteers or GB upon request. Assessment results are confidential.

d) Contracting and Invoicing

All suppliers **must** be registered with the WQSB. If the supplier is not registered, no payment of services can be made. All registered suppliers must follow reporting and invoicing requirements as specified in the Wakefield Elementary School's PPO Event Management Procedures document. As a minimum, invoices need to be submitted three (3) weeks in advance of payment due date.

e) Termination of Services

It is incumbent upon school staff to raise any performance issues during the school year with the GB (e.g. vendor's lack of compliance with the statement of requirements). Every effort will be made to communicate performance issues with the vendor and arrive at a mutually satisfying outcome.

If either the school or vendor must cancel services before the end of the school year, a minimum of two weeks' notice, in writing, is required.

Approval/Review

This policy was approved on September 29, 2009 and should be reviewed every two years.

Last reviewed: May 2015

Annex A: Request for Proposal Form

a) Contact Information

Name of supplier	
Address	
Telephone number/email	
WQSB supplier #	

b) Overview of good or service being offered

c) Information on goods/service

Criteria	Information Required
Alignment with school's mission, values, and policies	<i>Describe how your organization is aligned with the school's mission and values. If this is a food related good/service, demonstrate that you can provide food allergy safe product/service – in particular, nut/peanut free product.</i>
Quality of goods and services	<i>Describe the quality of your service or goods.</i>

Corporate capacity to deliver	<i>Provide examples of delivering this service or good or one that is similar in quality, nature and scope. If you have no examples, explain your capacity to deliver this good or service successfully.</i>
Environmental impact for services offered	<i>Describe how your organization safeguards the environment in its activities. Specify any relevant policies or practices.</i>
Cost	<i>What is the total cost? If applicable, provide unit cost.</i>
Other comments/information	

Supplier Contact Name	
Signature & date	

Annex B: Proposal Evaluation Form

Good or service:					
Supplier:					
Criteria	Excellent (3)	Good (2)	Poor (1)	Score	Comments
Alignment with school's mission, values & policies	<i>Supplier contributes to local community on a regular basis. If food involved, knowledgeable about food allergies and takes measures to provide a nut-free product.</i>	<i>Supplier has had some involvement in local community. If food involved, no knowledge about food allergies but willing to provide a nut-free product.</i>	<i>Supplier has no involvement in local community. If food involved, no knowledge about food allergies and not cannot provide a nut-free product.</i>		
Quality of goods & services	<i>Provided samples or demonstrated high quality of good/services.</i>	<i>Did not provide samples but has described quality of good/services.</i>	<i>Did not demonstrate quality of good/service.</i>		
Corporate capacity to deliver	<i>Demonstrated success in delivering service or goods similar in quality, nature, and scope on a timely basis.</i>				
Environmental impact for services offered	<i>Supplier integrates a range of sound environmental policies and practices. Core value of organization.</i>	<i>Supplier integrates some environmental policies and practices.</i>	<i>Supplier integrates no environmental policies and practices.</i>		
Cost of goods and services	<i>Lowest cost</i>	<i>2nd lowest cost</i>	<i>3rd lowest cost</i>		