

VILLAGE OF PEMBERTON PROCUREMENT POLICY

POLICY PURPOSE

1. Objectives

- 1.1 The purpose of the Village of Pemberton Procurement Policy (the "Policy") is to ensure that the Village of Pemberton (the "Village") receives the best value and quality in its acquisition of goods, services, and contracted construction in alignment with the Village's values and vision as outlined in key guiding documents, including but not limited to the Official Community Plan, Community Climate Action Plan, Strategic Plan, and any other Council directives.
- 1.2 This Policy establishes clear roles, responsibilities, and authority levels assigned to staff, and provides comprehensive guidelines for procurement. Its objectives are to:
 - a. Obtain the best value for funds expended.
 - b. Promote fairness, integrity, accountability, and transparency throughout the procurement process.
 - c. Leverage public resources to achieve strategic, social, and community outcomes.
 - d. Ensure compliance with legislative, ethical, and environmental standards, supporting sustainable procurement practices.

POLICY

2. Principles

- 2.1 The Policy ensures that the Village procures goods and services in a fair and open manner based on principles of competition, value, transparency, and accountability and alignment with the community's social and environmental values.

3. Authorities and Responsibilities

- 3.1 Village of Pemberton staff authorized to make purchases must comply with the guidelines, principles, and thresholds set out in this Policy, and must ensure that procurement activities are aligned with the Community Charter and other applicable regulations and best practices.
- 3.2 Staff with delegated authority for procurement are responsible for:
 - a. Ensuring purchases fall within approved budgets or financial plan amendments
 - b. Planning, managing, and documenting the procurement process to align with Policy standards
 - c. Managing solicitation and contract award processes in an ethical and transparent manner
 - d. Ensuring compliance with applicable trade agreements and maintaining alignment with legal and regulatory frameworks, including the New West Partnership Trade Agreement

(NWPTA) <https://www2.gov.bc.ca/gov/content/employment-business/business/managing-a-business/permits-licences/businesses-incorporated-companies/new-west-partnership-trade-agreement> and the Canadian Free Trade Agreement (CFTA) <https://www.cfta-alec.ca/>

- e. Prioritizing contracts that promote the best value and quality, while also considering environmental and social benefits
- f. Considering ancillary benefits and costs, financial and otherwise, that may arise from a contract
- g. Evaluating risk exposure related to intellectual property, liability, and indemnification in contract terms
- h. Ensuring contracts comply with all applicable legislation, including but not limited to WorkSafeBC, labour, taxation, Village bylaws, and any other regulatory requirements

3.3 The CAO is responsible for overall compliance with the Policy.

3.4 The CFO is responsible for developing and maintaining policies, procedures and internal controls relating to procurement processes and for leading and overseeing the procurement program.

3.5 Managers are responsible for ensuring that expenditures under their management comply with the financial plan.

3.6 Managers may delegate purchasing authority to staff within their division (authorized staff), subject to the approval authority identified in this policy.

3.7 Managers are responsible for advising the CFO of staff that have been delegated purchasing authority.

3.8 Managers are responsible for ensuring fully executed contracts, addenda, change orders and amendments are submitted to the CO in a timely manner.

3.9 Authorized staff will award and execute contracts on behalf of the Village subject to the limits set out by bylaw.

3.10 Contracts with a term longer than five years require Council approval.

3.11 Council's role in procurement is to provide policy direction, approve the financial plan, and approve contracts with a term longer than five years.

4. Application

4.1 This Policy applies to all individuals involved in the procurement of goods, services, or construction on behalf of the Village, including Village staff, contractors, and other agents.

4.2 The Policy does not apply to the following:

- a. Land and real property acquisitions;
- b. Facility and land rentals or leases;
- c. Utilities including hydro and gas;

- d. Borrowing and investing of funds;
- e. Policing services;
- f. Exclusive rights such as licenses, copyrights and patents;
- g. Admissions and registration for conferences, conventions, training courses, workshops and seminars;
- h. Memberships in professional and vocational associations;
- i. Agreements or transactions with other government agencies or First Nations

5. Prohibitions

- 5.1 The following activities are prohibited:
- a. Splitting contracts or purchases to avoid thresholds or competitive bidding processes
 - b. Committing the Village to contracts without proper authorization
 - c. Awarding contracts outside the financial plan without CFO approval
 - d. Entering into contracts that present a conflict of interest without appropriate approvals
 - e. Entering into non-standard financing agreements without express CFO approval

6. Exceptions to Policy

- 6.1 In the event of an emergency:
- a. Two of the following may jointly grant approval to enter a contract without undergoing a competitive bid process: *CAO, CFO and Mayor*
 - b. The *CAO* will provide a memorandum to Council at the next meeting detailing the emergency and the contracts issued
- 6.2 Trade agreement exemptions apply as per the relevant agreements and legislation.

7. Co-operative Purchasing

- 7.1 Savings likely to be achieved through purchasing goods and services jointly with other government bodies should be pursued.
- 7.2 Authorized Staff should participate with other government agencies or public authorities in joint purchasing ventures when it is in the best interests of the Village.
- 7.3 In such cases, the procedures set out by the agency responsible for the venture will be followed and not the procedures set out in this Policy. That is, where co-operative procurement arrangements are in place with other agencies that have undergone a competitive bidding process that meets or exceed those outlined in 11.2, no further bid process is required.

8. Ethical Considerations

- 8.1 All procurement processes will be conducted with integrity, transparency, and fairness. Staff must avoid conflicts of interest and must not engage in any activities that compromise the Village's procurement integrity, including the acceptance of gifts or favours from suppliers.

- 8.2 All bidders and suppliers will be treated equitably, with clear and transparent communication throughout the procurement process. No lobbying or undue influence will be tolerated during the bidding process.
- 8.3 Staff must maintain confidentiality regarding procurement processes, especially during the evaluation of bids or proposals.
- 8.4 The Village of Pemberton is committed to ethical procurement which includes human rights considerations and supply chains free of forced labour and child labour.
- 8.5 As part of the commitment to ethical procurement, the Village of Pemberton expects all suppliers to have responsible business practices, operations and processes.
- 8.6 At a minimum it is the expectation that the Village of Pemberton's suppliers will meet the following standards:
 - a. No forced labour: the Supplier and its subcontractors shall employ workers who choose to be employed. All work will be voluntary, and workers shall be free to leave upon reasonable notice.
 - b. No child labour: the Supplier and its subcontractors shall employ workers who are of legal working age.
 - c. Health and Safety: the Supplier will ensure that all workers involved in any part of the organization's business will be provided with a safe and healthy work environment. All workers will have the right to breaks in accordance with legal requirements.
 - d. Non-discrimination: The Supplier, its employees, and subcontractors shall not engage in discrimination and no person shall be discriminated against on the basis of race, colour, age, gender, sexual orientation, ethnicity, nationality, disability, place of origin, ancestry, source of income, pregnancy, religion, political affiliation, union membership, family status or marital status.
- 8.7 The Village of Pemberton will:
 - a. Adhere to all applicable legal requirements and trade agreements;
 - b. Communicate expectations with current and future suppliers;
 - c. Reserve the right to request additional documentation or information to confirm that suppliers and subcontractors are meeting the ethical procurement standards;
 - d. Terminate business with suppliers who do not meet the standards as set out in the Ethical Procurement section of this policy and Canadian's Human Rights Act; and
 - e. Use discretion when information that is not covered by this policy is brought to the attention of the Village of Pemberton about the supplier that suggests unethical practices.

9. Other Considerations

- 9.1 The Village of Pemberton prioritizes supporting local businesses and aims to purchase goods and services locally wherever possible. In cases where bids are competitive, preference will be given to local vendors, provided they meet the Village's standards for value, quality, and sustainability.

- 9.2 Purchases must be made at the lowest tendered or quoted price, following a value analysis that shall be consistent with the required quality and service.
- 9.3 The Village of Pemberton will prioritize purchasing from Indigenous Businesses to support Truth and Reconciliation Commission Canada's Call to Action #92 and for socio-economic reconciliation. The Village of Pemberton is committed to reconciliation with Indigenous peoples and to supporting the long-term economic interests, development and capacity of Líl'wat Nation.
- 9.4 The Village of Pemberton will seek to increase opportunities for Indigenous employment, training, contracting and subcontracting.
- 9.5 The Village of Pemberton will include environmental evaluation criteria that focus on sustainable practices and forward-thinking environmental protection, where preference will be given to environmentally friendly products whenever appropriate and affordable.
- 9.6 The Village of Pemberton will seek to leverage existing procurement activities to make intentional positive contributions to both the local economy and community. Social Procurement will help The Village of Pemberton, to achieve Social Value Objectives that align with its strategic goals and plans. The Village of Pemberton's Social Value Objectives include but are not limited to:
 - a. Local economic development and employment to support Pemberton residents.
 - b. Prioritize contracting and sub-contracting from Social Enterprises and other Social Value Suppliers in Pemberton's supply chain.
 - c. Increase training and apprenticeship opportunities.
 - d. Accessibility (Digital and built environment).
- 9.7 The Village of Pemberton's commitment to social procurement applies to the procurement of goods and services by all members of the Village of Pemberton team.
- 9.8 Where direct procurement from a social enterprise or social value supplier is not possible, the Village of Pemberton commits to looking at proponents' supply chains and employment practices to see where additional social, economic, and cultural value can be added.
- 9.9 The Village of Pemberton will report to Council on social procurement outcomes related to the social value objectives annually.

10. Authority, Signing Authority and Spending Limit Protocols

- 10.1 Table 1. sets out the procurement thresholds for Village officers and managers.

Table 1. Procurement thresholds for Village officers

Position	Procurement Threshold
CAO	Up to \$150,000
CFO	Up to \$75,000
Manager	Up to \$25,000

10.2 After the budget is approved by Council, each *manager* is accountable for their own budget.

10.3 Purchases over \$150,000 must be approved by Council.

PROCUREMENT PROCESS AND BID SOLICITATION

11. Bid Process

11.1 The Village will utilize a competitive bidding process to procure goods, services and construction unless otherwise permitted under the Policy. The process and procedure will apply to, but is not limited to, procurement in areas including general operational, consulting services, services agreements, rental and lease agreements, capital equipment, public works, and construction or renovation projects. See detailed instruction in Appendix A.

11.2 The bid solicitation process will meet the minimum criteria in Table 2.

Table 2. Bid solicitation criteria

Value of Procurement (including PST, duties and freight)	Procurement Method (minimum)	Evaluation Method
\$0-\$9,999	<i>Direct award or single informal quote</i>	One <i>authorized staff</i> based on professional judgement
\$10,000-\$74,999	<i>Informal quotation process (at least 3 written)</i>	Panel review of two or more <i>authorized staff</i> based on predetermined weighted criteria
\$75,000-\$199,999 construction contracts only	<i>Informal competitive bid (at least 3 written quotes or public competitive process)</i>	Panel review of two or more <i>authorized staff</i> based on predetermined weighted criteria
\$75,000 and higher for all contracts except construction contracts	<i>Formal competitive bid</i>	Panel review of two or more <i>authorized staff</i> based on predetermined weighted criteria
\$200,000 and higher for construction contracts	<i>Formal competitive bid</i>	Panel review of two or more <i>authorized staff</i> based on predetermined weighted criteria

- 11.3 Where co-operative procurement arrangements are in place with other agencies that have undergone a competitive bidding process that meets or exceeds those in 6.2, no further bid process is required.
- 11.4 All suppliers must be provided equal access to all information and reasonable and equal time to submit bids.
- 11.5 Selection criteria must be established, assigned weights, and specified in the bid solicitation. Criteria must consider supplier capability and experience, work method, and total cost of ownership and must incorporate principles of social value. Where all things are equal, the Village supports the use of local businesses.
- 11.6 Evaluation of bids must be conducted based on criteria and weightings determined under Section 11.5.
- 11.7 Records associated with a competitive bid process are subject to *Freedom of Information and Protection of Privacy Act* provisions and *authorized staff* are required to maintain those records in a manner consistent with the procedures established by the CO. Records must be easily accessible by the CO or CFO in the event of a public or supplier inquiry. The documentation must clearly demonstrate that contract selection complied with original bid solicitation, criteria established in section 11.5 and Village Policy. The CFO or CO may prescribe further procedures for how those records will be maintained or provided.
- 11.8 *Direct award* is not suitable where several small contracts for the same or similar service will be contracted throughout the year and the total expenditure for goods and services acquired within the year is reasonably expected to exceed \$25,000. *Authorized staff* are still responsible for ensuring reasonable market price and good value.
 - a. For consulting services where specialized expertise or experience in local government or with the Village will result in demonstrable cost savings a *direct award* may be considered with the approval of the *manager* and CFO up to a contract value of \$25,000.
- 11.9 In the absence of a competitive bid process, *authorized staff* must endeavor to negotiate best price and favourable contract terms.

12. Awarding and Contracting

- 12.1 Prior to executing an agreement, *authorized staff* will obtain and verify documentation of the following:
 - a. Approval by the *manager*;
 - b. WorksafeBC clearance if relevant;
 - c. Proof of contractor's general liability insurance for all contracted services;
 - d. Proof of professional liability insurance for consulting related services that meet the minimum levels prescribed in the Municipal Insurance Association of BC (MIABC) Recommended Minimum Insurance Requirements for Contracts:

[https://www.miabc.org/docs/default-source/risk-management/templates/recommended-minimum-insurance-requirements-for-contracts-\(2019\).pdf?sfvrsn=63be6fcf_2](https://www.miabc.org/docs/default-source/risk-management/templates/recommended-minimum-insurance-requirements-for-contracts-(2019).pdf?sfvrsn=63be6fcf_2)

- e. Proof of valid Village business license unless an exception is provided under another Village bylaw or policy
- 12.2 Regardless of contract price, *authorized staff* are responsible for providing *suppliers* with clear documentation of scope of work or itemized supplies being contracted, any contract requirements, the maximum value of the contract including taxes, freight and fees.
- 12.3 Authorized staff are responsible for:
- a. Reviewing contract terms and language to mitigate legal and financial risk to the Village;
 - b. Using recommended Village standardized contract templates where available and suitable to the nature and requirements of the contract; and
 - c. Assessing suitability and seeking additional officer or legal counsel where modifications or alternate contracts are required.
- 12.4 The procurement to payment process is automated within Vadim which provides the Village the necessary financial controls and audit compliance.
- 12.5 Procurement to payment process steps are as follows:
- a. Purchase order (PO) requisition is created in the financial system (Vadim);
 - b. Requisition is approved by the *Department Manager* and generates a purchase order;
 - c. *Vendor* invoicing is applied against approved purchase orders and cannot exceed the purchase order limit.

13. Change Orders

- 13.1 *Authorized staff* may issue *change orders* within the scope of the contract where the *revised contract value* does not exceed *authorized staff's* delegated authority AND where the contract will not exceed the expenditure budget for the project or works as approved in the Financial Plan. Change Orders will be documented appropriately within the Procurement Module of the Vadim Financial System.
- 13.2 In accordance with the *Local Government Act, Community Charter and Officers Bylaw*, *change orders* to projects that exceed or are not included in the approved five-year financial plan will require a *financial plan* amendment through the budget amendment process.

14. PROCUREMENT METHODS

- 14.1 *The Village* may employ any of the following procurement methods:
- a. *Market research methods*
 - b. *Request for information*
 - c. *Request for expression of interest*, to determine the market interest in a competitive solicitation process
 - d. *Direct award* may be used for a low value procurement or where it can be demonstrated that only one supplier can supply the good or service

- e. *Notice of intent to award*
- f. *Informal quote*
- g. *Written quote*
- h. *Public competitive process*
- i. *Notice of intent to award*
- j. *Request for proposal*
- k. *Request for standing offers (RSO)*
- l. *Request for qualifications (RFQu)*
- m. *Request for quotations (RFQ)*
- n. *Request for Corporate Supply Arrangement or Master Standing Agreement*

15. NOTICE OF INTENT TO AWARD

- 15.1 Notice of intent to award is used to provide public notice of Village's intent to direct award where a public competitive process would normally be required and where the Village cannot strictly demonstrate that there is only one supplier that can supply the good or service.
- 15.2 Notice of intent to award will be posted for a minimum of five (5) business days in the same manner as a public competitive process.
- 15.3 If the Village receives a successful challenge to a notice of intent to award, an appropriate procurement process will be undertaken.
- 15.4 Notices of intent to award must be approved by the CAO and originating manager. The manager will supply specific details in writing justifying the direct award according to one or more of the following conditions or objectives:
- a. To ensure compatibility with existing products or methods, to recognize exclusive rights, such as exclusive licenses, copyright and patent rights, or to maintain specialized products that must be maintained by the manufacturer or its representative;
 - b. Where there is an absence of competition for technical reasons and the goods or services can be supplied only by a particular *supplier* and no alternative or substitute exists;
 - c. For the procurement of goods or services the supply of which is controlled by a *supplier* that is a statutory monopoly;
 - d. For the purchase of goods on a commodity market;
 - e. For the acquisition of services from not-for-profit organizations;
 - f. For work to be performed on or about a leased building or portions thereof that may be performed only by the lessor or the lessor's pre-approved suppliers;
 - g. For work to be performed by a *contractor* according to provisions of a warranty or guarantee held in respect of the property or the original work or equipment;
 - h. For a contract to be awarded to the winner of a design contest;
 - i. For the procurement of a prototype of a first good or pilot of a first service to be developed in the course of a particular contract for research, experiment, study or original development, but not for any subsequent purchases;
 - j. For the purchase of goods under exceptionally advantageous circumstances such as used goods, bankruptcy, auction or receivership, but not for routine purchases;
 - k. For the procurement of utilities;
 - l. For the procurement of employee benefits;

- m. For the procurement of real property;
- n. Where a *public competitive process* is impractical because of the need to obtain unique third-party skills, there is a requirement for contractor continuity, or there is a strong case for the cost effectiveness of maintaining or retaining an existing contractor for a specific task;
- o. Where the CAO in conjunction with a *manager* approves the *direct award* purchase as requested.

16. AWARD METHODS

16.1 Table 3 sets out the award methods that will be used when finalizing a purchase commitment.

Table 3. Award methods

Award Method	Value Threshold and Award Conditions
Petty cash	<\$100 The Village does not have an account with the supplier
Purchase card	<\$5,000 unless higher amount approved by CAO The Village does not have an account with the supplier Preferred method for purchases designated in foreign currencies Cardholders are required to hold signing authority per an authorized Cardholder Agreement
Purchase order (PO) *	Any amount within the <i>authorized staff's</i> approval limit or approved by Council resolution <u>*Default method of award for all purchases</u> Should state specific terms and conditions
Cheque requisition	Any amount less than the <i>authorized staff's</i> threshold or approved by Council resolution The Village does not have an account with the <i>supplier</i> and <i>supplier</i> does not issue standard invoices Substantiating documentation required
Contract or agreement	Any amount within the <i>authorized staff's</i> approval limit or approved by Council resolution May be originated by the Supplier or the Village for all types of general, professional and construction services May require legal review if of a high value or complex
Change order or contract amendment	Any amount within the <i>authorized staff's</i> approval limit or as approved by Council resolution Used to update, alter, extend or otherwise modify a contract Changes to contract value must be within the approved Financial Plan or, if exceeding the Financial Plan, have received Council approval to amend the Financial Plan

17. INTERPRETATION

17.1 In this Policy, unless otherwise defined in section 14.2, words and phrases have the meanings assigned to them in the Local Government Act, the Community Charter, or the Interpretation Act.

17.2 In this Policy,

Authorized staff means staff delegated the authority to enter into agreements on behalf of the Village that bond the Village to the acquisition of goods and services under the Village of Pemberton Officer Bylaw No. 683, 2011 or Village of Pemberton Chief Administrative Officer's Bylaw No. 682, 2011. Staff are only considered authorized for contracts within their delegated purchasing authority;

Award refers to the business decision by *authorized staff* to enter into and execute contracts for goods, services and construction.

Best value means the optimal combination of compliant responses to the Village's terms and conditions and contract documents; providing the Village with the best value in Total Cost of Ownership as determined in accordance with specific criteria established by *authorized staff* and communicated during competitive bidding processes.

Bid means a submission from a Supplier in response to a solicitation or competition advertised by the Village for a contract to supply goods or perform services for the Village.

Change order means a contract amendment that increases or decreases the Scope of Contract and/or total dollar value of a contract.

CAO means the chief administrative officer for the Village;

CFO means the chief financial officer for the Village;

Consultant means an individual or firm that is not an employee of the Village and provides technical or professional services in the form of advice, plans, designs, policy development, reports or management services which do not result in an output of tangible assets or operational goods.

CO means the corporate officer for the Village;

Council means the elected officials of the Village of Pemberton.

Invitation to tender (ITT) is used to acquire construction and other services where price is the only deciding factor and when the work to be undertaken can be specified in detail and must be adhered to by the contractor. Award is generally to the lowest compliant bidder.

Manager means the head of a department of the Village or their designate.

Direct award means to enter into a contract for service without undertaking a competitive bid solicitation.

Emergency means an unforeseen present or imminent event or circumstance caused by accident, fire, explosion, technical failure or by forces of nature that poses an immediate threat to the safety of the community or would have irreversible impacts on the environment if not addressed immediately and where an immediate action will mitigate further financial loss to the Village.

Emergency excludes circumstances created by project administrative issues, lack of sufficient planning or failure to comply with Village policies.

Environmental impact describes the positive and negative effects an organization has on the environment.

Financial plan means the current bylaw under section 165 of the *Community Charter* which sets out the proposed expenditures of the Village, proposed funding sources and transfers between funds.

Financing agreements include leases, promissory notes and other financial instruments that bound the Village to a payment plan and financing rates. Execution of *financing agreements* is not delegated to *Authorized staff* as defined under this Policy.

Formal Competitive Bid is a *Bid* solicitation which must be advertised on BC Bid and the Village's website.

Indigenous Business is a business where 51% or more of the business is owned and controlled by individuals who identify as Indigenous.

Informal Competitive Bid is a *Bid* solicitation that at a minimum must be advertised on the Village website and provided to a minimum of three (3) Suppliers with known qualifications but other forms of local advertising are encouraged. Documentation soliciting bids and Supplier responses must be in written form but may be conveyed by email, mail, or direct delivery.

Informal quotation process means that three (3) quotes are solicited through an informal communication process including email or phone. Documentation is required and must include particulars about time, date and nature of supply or goods solicited, whether a quote was received from each Supplier and details of each quote including total contract price.

Informal quote is a quote that has been requested by phone or email and received verbally, via fax, email, mail, or delivery. Informal quotes received verbally must be documented by detailed and dated notes.

Market research methods are public solicitations that do not result in the award of Village business. They are used to assess the marketplace for potential procurement opportunities and to offer the market transparent and fair input into a resulting competitive procurement process. Mayor means the individual elected to the position of mayor or a council member appointed as Acting Mayor.

Non-standard credit terms include payment requirements outside of industry standards which may include payment terms less than net 30 days from the invoice date, interest rates that exceed 18% per annum or that assign Village assets as collateral.

Officer refers to the chief administrative officer, financial officer or corporate officer pursuant to the *Community Charter* or their designates or deputies.

Open Fair and Transparent means ensuring that the public is aware of and permitted to compete for supply opportunities in their demonstrated field of expertise.

Proponent means suppliers, contractors or consultants that may have received or may be responding to a bid request from the Village.

Bid means a formal procurement opportunity made publicly available on Village's website, the Province of British Columbia's BC Bid website, or any other public tendering system.

Request for corporate supply arrangement or master standing agreement is used to acquire goods or services on behalf of a collaborative or co-operative buying group or purchasing consortium. Award is either price based or value-based.

Request for information is used to request general information regarding goods or services provided by suppliers, and to invite input regarding the development of procurement strategies. A request of this type may also request a response that includes high-level budgetary considerations.

Request for proposal (RFP) is a process to acquire services (primarily) where price is not the only consideration in selecting a contractor . The Award is value-based and awarded to the proponent with the highest score and offering best overall value.

Request for qualifications (RFQu) is used to create a pre-qualified list of suppliers who are eligible to participate in subsequent procurement processes. Shortlists are created using qualitative factors only and price would not normally be considered.

Request for quotations (RFQ) is used to acquire goods or services when price is the predominant deciding factor. Awarded to the lowest price bid that meets all mandatory requirements and specifications, with consideration of local businesses as set out in section 15.1

Request for standing offers (RSO) is used to acquire offers for goods or services that are needed on an ongoing basis, where the Village enters into a contract only when an order is placed, as needed. Can be either price-based or value-based.

Revised contract value is the value of the contract awarded plus all change orders or additions to that contract over the course of the contract.

Scope of contract means predefined deliverables in the bid or contract. It includes additional works that may not have been foreseen at the time of contracting or bid but that are necessary to meet the defined deliverables.

Social benefit describes the positive social impact of the Village's procurement activities. It can include but not be limited to diversifying the Supplier base, and engaging Indigenous companies, Social Enterprises and not for profit organizations.

Social procurement is a procurement practice that seeks to leverage existing procurement activities to achieve positive social outcomes such as environmental, social, and economic benefits that align with community values and strategic objectives.

Social Value means supporting Council's objectives as articulated in the Village's Strategic Plan, Official Community Plan that impact the wellbeing of individuals in the Community.

Supplier means any person or business that supplies goods or services to the Village.

Trade agreements means any Government of Canada, or Province of British Columbia or international trade agreement that apply to the procurement practices of municipalities in British Columbia including, that include but are not limited to, the Canada Free Trade Agreement (CFTA), the New West Partnership Trade Agreement (NWPTA) EU-Canada Comprehensive Economic Trade Agreement (CETA).

Written quote is a formal quote offering goods and/or services for stated amounts and may include specific terms and conditions.

- 17.3 In this policy, a reference to an enactment refers to that enactment as amended or replaced from time to time.

APPENDIX A

SPENDING, COMMITMENT AND SIGNING AUTHORITY MATRIX

Spending \$ Level	Commitment Type	Number of Quotes*	Method of Quote Type (Minimum)	Signing Authority	Special Conditions
< \$100	Petty cash	Single	In person	Department delegation	Detailed receipts. Reconciliation by Department Manager.
≤ \$ 1,500	Purchase Card, PO or cheque requisition	Single	Verbal	Purchase card holder or delegated authority	Detailed receipt if Purchase Card or cheque requisition PO issued if purchase card not used and the purchase is over \$500, except for pre-authorized suppliers. All receipts and PO's must be GL coded, signed, submitted within 24 hours.
<\$10,000	Purchase order	Best practice is three (3) verbal or <i>written quotes</i> . Verbal refusal included in count.	Verbal with a staff documented record	Delegated authority up to \$5,000 or co-sign by manager if < \$5,000 or CFO if > \$5,000	Delegated Authority by or purchase order with co-sign if over delegated authority. (3 verbal quotes when possible, for either method, refusals count as a quote).
\$10,001-\$25,000	Purchase order	Three <i>written quotes</i> . Written refusal included in count.	Written document	Delegated authority up to \$25,000 or co-sign manager and CFO	Delegated Authority by purchase order with co-sign if over delegated authority. (3 <i>written quotes</i> when possible, for either method, refusals count as a quote).
> \$25,000 - \$75,000	PO, contract or agreement	By invitation, see special considerations	Request for Quote (RFQ) or Request for Proposal (RFP) or Tender	If ≤ \$75,000 CAO <u>and</u> CFO	Managers may initiate the written request for review and authorization by the approved signing authority. Up to \$75,000, the CAO or CFO have authority. Invitations must be advertised on the Village website. Optional to advertise on BC Bid website
> \$75,000	PO, contract or agreement	By invitation, see special considerations	Request for Quote (RFQ) or Request for Proposal (RFP) or Tender	If > \$75,000, <u>both</u> CAO and CFO	Above \$75,000, authorization by both the CAO <u>and</u> CFO, and the originator. For RFPs >\$75,000 and Tenders >\$200,000 for goods or services, must be advertised on Village website, and BC Bid website

*all quotes and refusal to quote (verbal to be documented by recipient)