
Policy:	Purchasing and Tendering
Policy No.:	C3.31
Main Contact:	Treasurer
Date Passed:	September 26, 1983
Last Revision:	December 10, 2019

[Scope](#)

[Procedure](#)

[Contact](#)

[Change History](#)

Scope

The following Policy, developed by the Treasurer, was initially adopted by Council to be effective September 27, 1983. An attempt is made in the Policy to differentiate between “operational”, “capital”, and “professional service” expenditures.

This Policy contains accessibility criteria and is compliant with the *Accessibility of Ontarians with Disabilities Act, 2005, AODA*, as amended.

Procedure

1. **Operational:**

Items to be considered in this area are those expenditures for goods and services which are incurred in the normal day to day operation of the Municipality, do not increase the anticipated useful life beyond the current year and do not form part of a capital project.

Guidelines:

A) Up to \$12,000

The Department Heads will exercise their discretion and the departments experience in selecting the supplier.

B) Over \$12,000 to \$35,000

The Municipality will advertise and invite firms interested in supplying goods or services to register. A supplier’s list will be established and this list used as a source to seek quotations. The Department Head will have authority to award to the lowest quotation: Any variation from the lowest quotation will require Council approval.

C) Over \$35,000

Council will award to supplier based on quotations received and recommendation of the Department Head.

NOTE: Municipal Employees will exercise bulk buying in cases where it is financially advantageous to the Municipality.

2. Capital:

Items to be considered in this area are those expenditures which are incurred to provide the Municipality with a tangible good and service which is either new to the Municipality or increases the useful life of a current good or service beyond the current year.

Guidelines:

A) Up to \$35,000

The Municipality will advertise subsequent to Council approval of the current year's budget indicating that the Municipality plans to purchase various items. A supplier's list will be established and this list used as a source to seek quotations. The Department Heads will have authority to award to the lowest quotation. Any variation from the lowest quotation will require Council approval.

B) Over \$35,000

By public tender placed in the media deemed appropriate and the award will be subject to Council approval. Tender specifications will be subject to Council approval prior to the tender call for all areas within the construction or building fields and when the tender call proposes to contract a public service.

3. Professional Services:

Professional service is defined as the engagement of a Firm from a professional discipline on a contract or non-contract basis. (i.e. management consultants, engineers, etc.).

Guidelines:

A) \$0 to \$12,000

As determined from a list of professionals based on the discipline required. This list is to be developed from firms known to the department and/or determined by public advertisement. The Department Head will have authority to award to

lowest proposal. Any variation from the lowest proposal will require Council approval.

B) Over \$12,000

Council will award to the professional Firm based on proposals received and the recommendation of the Department Head. A formal contract must be executed with the Firm involved.

The Purchasing and Tendering Policy is subject to the following:

1. Constraints of the current fiscal budget.
2. Invitational tenders/quotations/proposals as opposed to public tenders/quotations/proposals where deemed appropriate by Council.
3. Advertisements will be placed in the local weekly newspaper along with the normal daily valley newspaper as deemed necessary by the Department Head.
4. Any goods or services deemed appropriate in case of emergency will be proceeded with and Council approval will be sought after the fact.
5. A minimum of three quotations are required in all instances where quotations are requested. (when available)
6. All quotations, proposals, and tenders will be received by the Treasurer and opened at the time specified in the presence of the Department Head, and one elected Official.
7. All monetary parameters referred to in the guidelines of this policy shall increase on an annual basis by the C.P.I. and shall be revised every five years.
8. To promote, and incorporate, wherever possible, the requirements of the Ontarians with Disabilities Act, 2001, (ODA), C-81 Accessible Canada Act, the Accessibility of Ontarians with Disabilities Act, 2005, (AODA), and specifically, Ontario Regulation 191-11 made under the Accessibility for Ontarians with Disabilities Act, 2005, in procurement activities of the Town, and in cases where it is deemed not practicable to incorporate accessibility criteria features in procurement activities, an explanation shall be provided upon request.

Contact

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Change History

Policy Name	Effective Date	Significant Changes	By-law No.
Purchasing and Tendering Policy	1983-88	Levels increased by 25%	As provided for in policy.
Purchasing and Tendering Policy	1989-2000	Levels increased by 29%	As provided for in policy.
Purchasing and Tendering Policy	2000-2005	Levels increased by 15%	As provided for in policy.
Purchasing and Tendering Policy	December 10/19	Accessibility Criteria	Resolution #