



PROCEDURE PR.577.FIN

TITLE: ACQUISITION OF CONSULTING AND PROFESSIONAL SERVICES

Date issued: June 1999

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1.0 OBJECTIVE

To delegate purchasing authority for the acquisition of consulting and professional services within specified limits and approved procedures.

2.0 DEFINITIONS

Consultant means an individual or a firm providing consulting or professional services.

Consulting and professional services includes architectural, engineering, design, management, financial consulting services, brokers, education and training services, planning services, medical and health services, and other similar services rendered on behalf of the Ottawa-Carleton District School Board.

3.0 PROCEDURES

3.1 Services will be solicited and obtained within the following limitations (exclusive of tax):

- (a) up to \$2,500 by verbal quotation and submitted to the Purchasing Division through the electronic requisitioning system (BAS) for processing or paid by Board Purchase card;
- (b) from \$2,501 to \$25,000 by verbal quotation(s) with written explanation as to why the firm or individual being recommended has specific qualifications/expertise peculiar to the project being considered. Electronic requisition (BAS) to be submitted to the Purchasing Division with accompanying documentation and the approval of the Principal/Manager to proceed;
- (c) from \$25,001 to \$50,000 through a formal quotation administered by the Purchasing Division;
- (d) from \$50,001 to \$99,999 by means of a formal tender/request for proposal (RFP) administered by the Purchasing Division;
- (e) \$100,000 and over: refer to Board Policy P.057.FIN: Acquisition of Major Services.

- 3.2 The best-qualified individual or firm will be selected upon such terms and conditions as are deemed fit under the circumstances. In selecting the best qualified individual or firm the following factors, at a minimum, shall be considered:
- (a) expertise;
 - (b) experience;
 - (c) cost and best service value;
 - (d) past performance on Ottawa-Carleton District School Board contracts;
 - (e) reliability and integrity;
 - (f) references;
 - (g) availability of consultant;
 - (h) any factors peculiar to the project being considered.
- 3.3 Evaluation criteria and scoring factors to be used in the evaluation of the submissions will be established and documented in the Request for Proposal prior to it being issued.
- 3.4 All resulting contracts for consulting and professional services must be reviewed by the Coordinator of Purchasing and must be signed by the Director of Education or Chief Financial Officer or designate before the work commences.

4.0 REFERENCE DOCUMENTS

Board Policy P.007.FIN: Signing Authority and Spending Controls
Board Policy P.057.FIN: Acquisition of Major Services
Board Policy P.069.FIN: Tendering, Purchasing and Acquisition of Supplies and Services
Board Procedure PR.502.FIN: Spending Authorization and Controls
Board Procedure PR.557.FIN: Acquisition of Major Services
Board Procedure PR.558.FIN: Tendering, Purchasing and Acquisition of Supplies and Services