

Toronto District School Board

Operational Procedure PR680

Title: **Consulting Services**
Adopted: April 16, 2002
Revised: June 9, 2009, **May 18, 2011**
Reviewed: November 2011
Authorization: Administrative Council

1.0 OBJECTIVE

To establish administrative guidelines based on policy P017, Purchasing

2.0 DEFINITIONS

(Refer to policy P017, Purchasing)

3.0 RESPONSIBILITY

Chief Financial Officer

4.0 PROCEDURES

4.1. Consulting Services Contracts Up to \$50,000

Consulting Services, as defined above, which are up to \$50,000 follow an invitational competitive procurement, conducted by Purchasing Services, and a minimum of three bids must be obtained where at all possible. Prior to award, all contracts must be approved by Administrative Council. A Purchase Order and/or agreement will be issued by Purchasing Services to the "Consultant" using the SAP financial system upon receipt of an approved requisition, in electronic form, from the user department.

4.2. Sole/Single Source Consulting Services Contracts Up to \$50,000

Where a user department deems that any Consulting Services contract up to \$50,000 must be excluded from the competitive bidding process, for whatever reason, the user department must prepare a report which will include the rationale for this and obtain approval from the Director of Education prior to awarding a contract.

4.3. Consulting Services Contracts Greater Than \$50,000

All one-time and cumulative (up to one year) contracts for Consulting Services which exceed \$50,000 must be processed through PDS using the Request for Pro-

posal process (RFP). All RFPs are to be advertised on an electronic bulletin board to allow maximum exposure and the widest possible competition. All contracts for Consulting Services greater than \$50,000 must be approved by the Board prior to an award as per Purchasing Policy P.017. Following Board approval, PDS will issue a Purchase Order/Outline Agreement through the SAP financial system upon receipt of a requisition, in electronic form, from the user department.

4.4. Sole/Single Source Consulting Services Contracts Greater than \$50,000

Where a user department deems that any Consulting Services contract greater than \$50,000 must be excluded from the competitive bidding process, for whatever reason, the user department must prepare a report which will include the rationale for this and obtain Board approval prior to awarding or extending a contract. Following Board approval a Purchase Order/Outline Agreement will be entered in the SAP financial system for all such contracts.

5.0 REFERENCE DOCUMENTS

Policy P017, Purchasing