



student
transportation services

service de transport scolaire

Brant Haldimand Norfolk

Title : Purchasing Policy	Procedure # : 042	Effective : Nov 5, 2010
Section : Operating Guidelines	Page : 1 of 7	Review : February 2017

Statement	<p>Student Transportation Services Brant Haldimand Norfolk (STSBHN) supports a central purchasing system as a means of balancing a number of objectives including: accountability, transparency, value for money and effective quality of service delivery.</p> <p>In order to implement this administrative procedure, the Manager of Transportation Services, under the authority of the Operations Committee, will adopt and practise recognized purchasing procedures.</p> <p>The adopted procedures will ensure cost effectiveness and efficiency and provide quality materials, supplies and services consistent with the needs and in the best interests of STSBHN and its member boards.</p>
Purchasing Methods	<p>1. Approval Authority Levels</p> <p>Approval of purchasing supplies and services is based on the total estimated dollar value, including any agreed-up renewals, and exclusive of applicable taxes.</p> <p>The designated purchasing authorities are as follows:</p> <ul style="list-style-type: none"> • Transportation officer: \$0-\$2,500 • Manager of Transportation Services: \$2,501-\$50,000 • Operations Committee: \$50,001-\$100,000 • Board of Directors: \$100,001+ <p>The following dollar thresholds indicate the purchasing process to be followed by all staff when acquiring supplies and services:</p> <p>\$0 - \$2,500: one quote required when within the authority and budget limit of the staff person.</p> <p>\$2,501 - \$10,000: a minimum of three (3) verbal or informal written quotes on the firm's letterhead, if possible.</p> <p>\$10,001 - \$25,000: obtain a minimum of three (3) written quotations following the request for quotation (RFQ) process.</p>



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<p>Purchasing Methods... continued</p>	<p>\$25,001 - \$100,000: issue an invitation to tender. The tender will be advertised on the consortium's website and on an electronic bulletin board within the Province of Ontario. Depending on the nature of the need, the consortium may elect to issue a request for proposal (RFP) instead of a tender.</p> <p>\$100,001+: use an open competitive procurement process of either a Request For Tender (RFT) or a Request For Proposal (RFP). The bid document will be advertised on a nationally recognized electronic bulletin board and follow a prescribed evaluation process.</p> <p>The Manager of Transportation Services, in consultation with the Operations Committee, has the authority to obtain goods and/or services in an alternate manner, provided it is in the best interest of STSBHN and its member boards. (e.g. taxi services governed by municipal rate structures)</p> <p>Splitting requirements into multiple procurements to reduce the estimated value of a single procurement and avoid the application of the identified value threshold is not permitted.</p> <p>2. Emergency Purchases</p> <p>In the case of emergencies, the Manager of Transportation Services has the authority to obtain goods and/or services in the most expedient possible manner regardless of the amount. Emergencies are defined as circumstances or situations beyond anyone's control which have the potential of effecting health, life or safety of students or other personnel, or result in undue financial losses.</p>
<p>Suppliers</p>	<p>1. Environmentally Sound Products</p> <p>STSBHN supports environmentally sensitive products and services. All criteria being equal, STSBHN will give preference to environmentally sensitive products and services. On a commodity basis, the following environmental factors</p>



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Suppliers... continued	<p>will be considered when specifications are developed:</p> <ul style="list-style-type: none"> a) products of recycled and/or recyclable content; b) products that meet environmental safety and low toxicity standards and provide acceptable levels of performance; c) products and technology that minimize waste; d) bulk purchasing. <p>2. Health and Safety</p> <p>All goods and/or services purchased by STSBHN must comply with all appropriate Federal, Provincial, and Municipal legislation, regulations, and standards as well as all STSBHN policies.</p> <p>Material Safety Data Sheets (MSDS) and appropriate labels must be obtained with each delivery of any controlled product as defined by Workplace Hazardous Material Information System (WHMIS) legislation. It is the responsibility of the end user to ensure that a MSDS is kept on file at the site.</p> <p>All electric/electronic components supplied must be Canadian Standards Association (CSA) or Underwriter's Laboratories of Canada (ULC) approved for institutional use and labelled accordingly.</p> <p>3. Humane Working Conditions</p> <p>STSBHN is committed to make every reasonable effort to ensure that all supplies purchased by STSBHN are manufactured under humane working conditions in compliance with accepted international standards and local laws.</p>
Public Tenders and Requests for Proposal	<p>1. Advertising of Tenders/Proposals</p> <p>Purchases over \$100,000.00 will be made by advertised Requests for Tender (RFT) or Requests for Proposal (RFP). Suppliers will also be invited based on source lists.</p> <p>2. Submission Procedures</p>



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Public Tenders and Requests for Proposal continued...	<p>All tenders submitted must meet mandatory criteria and comply with all specifications and be submitted within the time specified in the tender document. It is the bidder's responsibility to ensure that the tender is received before the deadline.</p> <p>3. Validity</p> <p>The Manager of Transportation Services or designate shall ensure that the RFT/RFP conforms to all stipulated conditions and shall advise the Operations Committee of any circumstances or conditions in the tender which might invalidate the tender and such circumstances or conditions may include:</p> <ul style="list-style-type: none">a) the RFT/RFP being received after the stipulated time;b) the RFT/RFP not being complete;c) the RFT/RFP not being written in ink or typewritten;d) unit or total prices being illegibly written or not entered;e) erasures or changes not being initialled;f) the RFT/RFP lacking clarity or having obvious misinterpretation of the specifications;g) the RFT/RFP not being signed; and/orh) bonding requirements not enclosed with tender or not as per specifications. <p>4. Contract Term</p> <p>Services required by the STSBHN may be tendered for a period of greater than one year, but generally not to exceed a five-year term with the provision of extending for an additional year or as specified in the original tender document.</p> <p>5. Freedom of Information</p> <p>All proposals submitted to STSBHN become the property of the Consortium and as such are subject to the provisions of the <i>Municipal Freedom of Information and Protection of Privacy Act</i> regarding information which may be provided in</p>
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	confidence. Bidders must clearly state, in their bids, if disclosure of any portion of the bid would cause injury to the company. Any information submitted by any vendor that is to be considered confidential must be clearly marked as such.
Co-operative Purchasing	Co-operative purchasing methods may be used as a mechanism to purchase goods or services to ensure achievement of maximum value to STSBHN and its Member Boards.
Code of Ethics	<p>STSBHN expects honesty and integrity, professionalism, responsible management, and the serving of public interest to be primary values in its procurement decisions.</p> <p>STSBHN will operate and conduct their procurement decisions and actions based on the following:</p> <ul style="list-style-type: none"> a) maintain an unimpeachable standard of integrity in all business relationships. b) optimize the use of resources to provide the maximum benefit to STSBHN and its member boards; c) do not use the authority of public office for personal benefit; d) consider first the interest of STSBHN and its member boards in all transactions; e) preserve the image and integrity of STSBHN; f) accept no business gifts other than items of small intrinsic value; Reasonable hospitality is an accepted courtesy of a business relationship. The frequency and nature of gifts or hospitality accepted should not be allowed whereby the recipient might be, or might be perceived by others, to have been influenced in making a business decision as a consequence of accepting such hospitality or gifts. g) seek counsel from the Operations Committee as required; h) buy without prejudice; i) subscribe to and work for honesty in buying, and denounce all forms of improper business practice; j) work with the highest ideals of honour and integrity in all public and personal relationships in order to merit



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	<p>the respect and inspire the confidence of STSBHN and the public being served;</p> <p>k) seek or dispense no personal favours, and</p> <p>l) handle each purchasing situation objectively and empathetically, without discrimination.</p>
Conflict of Interest	<p>A "Conflict of Interest" exists where the decisions made and/or the actions taken by STSBHN could be, or could be perceived to be, affected by financial or business interests of the decision maker or the person's family or business associates.</p> <p>STSBHN is responsible and accountable for using good judgement in the exercise of its duties and must:</p> <p>a) disclose in writing any conflict of interest in a purchasing decision to their supervisor; and</p> <p>b) avoid situations that may present a conflict of interest while dealing with persons or organizations doing business or seeking to do business with STSBHN.</p> <p>In a conflict of interest situation, members of the Operations Committee are governed by the Municipal Conflict of Interest Act.</p>
Dispute Resolution	<p>STSBHN is committed to promoting fair and open competition among vendors for any purchased goods and/or services. During the purchasing process, if a supplier feels that he/she has been unfairly prejudiced by a decision made by STSBHN, the following steps will be taken to resolve the complaint:</p> <p>a) All complaints will be forwarded to the Manager of Transportation Services in writing within ten (10) days of an award.</p> <p>b) The Manager of Transportation Services will investigate the nature of the complaint by reviewing the information to determine the grounds and alternatives for resolution</p> <p>c) The Manager of Transportation Services will attempt to resolve the dispute. Successful resolutions shall be documented in writing and sent to all parties concerned.</p> <p>d) If the Manager of Transportation Services is unable to resolve the dispute with the participants, all of the</p>



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	<p>documentation concerning the dispute will be forwarded to the Operations Committee. If deemed necessary, the Operations Committee may interview any or all that are involved. The Operations Committee will make a decision within a reasonable length of time. The Operations Committee's decision is final.</p>
Surplus Furniture and Equipment	<p>The Manager of Transportation Services shall determine if furniture and/or equipment belonging to STSBHN is surplus to their particular use.</p> <p>1. Responsibility</p> <p>The responsibility for disposing of equipment deemed surplus lies with the Manager of Transportation Services. The Manager of Transportation Services, in consultation with the Operations Committee, shall have the authority to sell, auction, exchange, or trade-in goods declared surplus to STSBHN office needs.</p> <p>2. Purchase of Surplus</p> <p>Surplus assets for personal use only can only be acquired through purchase at public auction or sealed tender.</p> <p>3. Disposal of Scrap Items</p> <p>Where items have been declared surplus, are not Board owned, and are determined by the Manager of Transportation Services to have little or no value, the Manager of Transportation Services, in consultation with the Operations Committee, shall have such items declared scrap. Disposal methods utilizing re-use and recycling will be given preference over landfill.</p> <p>For items that were loaned to STSBHN by a member board and have been deemed surplus by the Manager of Transportation Services, the item will be returned to the member board and dealt with according to established policies.</p>