



Student Transportation Services

BRANT HALDIMAND NORFOLK

Services de Transport Scolaire

Title: Purchasing Policy	Procedure #: 042 Page: 1 of 7	Section: Operating Guidelines
Effective: Nov 5, 2010	Last Reviewed: Feb 2020	Next Review: Feb 2023

Statement	<p>Student Transportation Services Brant Haldimand Norfolk (STSBHN) supports a purchasing process as a means of balancing a number of objectives including: accountability, transparency, value for money and effective quality of service delivery.</p> <p>The Manager of Transportation Services, under the authority of the Operations Committee, will adopt and practice 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 school 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: \$0-\$50,000 • Operations Committee: \$0-\$100,000 • Board of Directors: \$0 - \$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 or other recognized purchasing best practice. Where required, the bid document will be advertised on a nationally recognized electronic bulletin board and follow a prescribed evaluation process.</p> <p>Other Circumstances/ Situations</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.</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. In the event that an emergency purchase is required that has a value greater than \$50,000, the Manager of Transportation will notify the Operations Committee with the scope and cost immediately via email. This will be followed-up with a formal report to the Operations Committee at their next scheduled meeting outlining what the purchase was and the event(s) which lead to the emergency.</p>



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<p>Suppliers</p>	<p>1. 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>2. 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> <p>3. Environmentally Sound Products</p> <p>STSBHN supports environmentally sensitive products and services.</p> <p>All criteria being equal, STSBHN will give preference to environmentally sensitive products and services.</p> <p>On a commodity basis, the following environmental factors 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.
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<p>Public Tenders and Requests for Proposal</p>	<p>1. Advertising of Medium</p> <p>Purchases over \$100,000.00 will be made by advertised, at a minimum, on a nationally recognized electronic bulletin board, each member school board's websites as well as the STSBHN website.</p> <p>Suppliers may also be invited based on source lists or vendors of record held by Provincial purchasing agencies (ex: OECM).</p> <p>2. Submission Procedures</p> <p>All submissions must meet mandatory criteria, 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 competitive procurement process conforms to all stipulated conditions and shall advise the Operations Committee of any circumstances or conditions which might invalidate, or call into question the validity, of the process.</p> <p>4. Contract Term</p> <p>Services required by the STSBHN may be procured for a period of greater than one year, in order to meet the needs of STSBHN and its member school boards. Currently all contracts being entered into with a term of greater than two (2) years requires an exception request to be submitted to the School Business Support Branch of the Ministry of Education, at least 45 days in advance of the procurement process.</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</i></p>
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	<p><i>Privacy Act</i> regarding information which may be provided in confidence. Bidders must clearly state, in their bids, if disclosure of any portion of the submission would cause injury to the company. Any information submitted by a vendor that is to be considered confidential must be clearly marked as such.</p>
Co-operative Purchasing	<p>Co-operative purchasing methods may be used as a mechanism to purchase goods or services to ensure maximum value is obtained by STSBHN and its member school boards.</p>
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 school boards in all transactions; e) preserve the image and integrity of STSBHN and its member school boards; 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. 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>The staff of 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 and Board of Directors 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 they have 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 parties that are involved. The Operations Committee will make a decision within a reasonable length of time. The Operations Committee's decision is final.</p>
<p>Surplus Furniture and Equipment</p>	<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 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 member board owned, and are determined by the Manager of Transportation Services to have little or no value, the Manager of Transportation Services 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>