

## OVERVIEW

Halifax Regional School Board is committed to the acquisition of goods and services in an efficient, cost-effective and consistent manner. The purpose of the Board's Purchasing Policy is to ensure that the procurement process is open, fair and competitive. The Purchasing Division supports the Board's objective of directing quality physical resources to classrooms and departments at maximum value for cost.

## PURCHASING GUIDE

This Purchasing Guide is a quick reference on purchasing requirements and procedures. Halifax Regional School Board's Purchasing Policy E.001 and Purchasing Handbook (available on the Board's website) should be consulted for more detailed information.

It should be noted that the Purchasing Policy applies to all staff, in any location, who may be involved in purchasing, recommending for purchase, or receiving any supplies, equipment, services and/or materials for use within the school system. *The Purchasing Policy is applicable to the procurement of goods and services utilizing donations, school based funds, as well as Board funds.*

## SUGGESTIONS FOR IMPROVING THE PURCHASING PROCESS?

The main objective of the Purchasing Division is to fulfill school and departments purchasing needs. Suggestions for improving our process are always welcome. Please feel free to call the Purchasing Department or stop by the Purchasing Office (3<sup>rd</sup> Floor, 90 Alderney Drive, Dartmouth) to discuss your ideas.

## PURCHASING DEFINITIONS

**Goods** – Tangible items such as furniture, office supplies or building materials.

**Services** – Installation of equipment already purchased, repair of current equipment, deliveries, etc.

**Construction** – Installation & supply of materials for building projects.

**Invitation to Tender/Quote** – The purpose is to obtain competitive bids. A tender or quote adequately defines the requirements in the document so that bids can be evaluated using the stated criteria and specifications.

**Request for Proposal (RFP)** – Suppliers are invited to propose a solution to a problem, requirement or objective. Negotiations with suppliers may be required to finalize any aspect of the requirement.

## PURCHASING GUIDELINES

Schools/Offices may use "Purchasing Cards" e.g. Master Card for the acquisition of *non-tendered goods valued at less than \$1,000.00 (including taxes)*. For the acquisition of *goods with an estimated value of more than \$1,000* Schools/Offices must follow the established purchasing thresholds indicated in this guide.

## PURCHASING ASSISTANCE

*Please keep in mind that the Purchasing Division is available to assist schools & offices in the development of contracts, specifications, tenders, request for proposals and other purchasing requirements.*

## PURCHASING THRESHOLDS

### GOODS: UNDER \$10,000

At least three (3) quotations are required, where feasible. A "Request for Quotation" form is available on the Board's website as your record for auditors.

### GOODS: OVER \$10,000

Goods with an estimated value *greater than \$10,000 will be publicly advertised on the Halifax Regional School Board tender website, as well as the Government of Nova Scotia's Electronic Bulletin Board*. Purchasing Division must issue a public tender, Request for Quote or a Request for proposal.

### SERVICES: UNDER \$25,000

For the acquisition of *services under \$25,000, three quotes are required*. The "Request for Quote" form is available on the Board's website as your record for auditors.

### SERVICES - OVER \$25,000

*Services with an estimated value greater than \$25,000 will be publicly advertised on the Halifax Regional School Board tender website, as well as the Government of Nova Scotia's Electronic Bulletin Board*. Purchasing Division must issue a public tender, Request for Quote or a Request for proposal.

### CONSTRUCTION, RENOVATION and REPAIRS - UNDER \$25,000

*For the acquisition of construction, renovations and repair services under \$25,000 three quotes are required*. The "Request for Quote" form is available on the Board's website as your record for auditors.

## **CONSTRUCTION, RENOVATIONS AND REPAIRS - OVER \$25,000**

Construction, renovations, or repair services with an estimated value greater than \$25,000 will be publicly advertised on the Halifax Regional School Board tender website, as well as the Government of Nova Scotia's Electronic Bulletin Board. Purchasing Division must issue a public tender, Request for Quote or a Request for proposal.

## **N.S. GOVERNMENT ELECTRONIC BULLETIN BOARD:**

To view tenders posted on the NS Government Electronic Bulletin board go to: [http://www.gov.ns.ca/tenders/search/search\\_all.asp](http://www.gov.ns.ca/tenders/search/search_all.asp) In the dropdown menu you will see "Halifax Regional School Board", click "Search" to view current HRSB tenders. Tender awards are also posted on the Electronic Bulletin Board under "Tender Results/Award Notices".

## **VISIT THE SCHOOL BOARD'S WEBSITE:**

The School Board's web address is: <http://www.hrsb.ns.ca> Vendors can view and download tenders by clicking the "Quick Links" and selecting "Tenders". Schools can click on "Quick Links - MY HRSB", enter your user name and password to locate Purchasing Forms. If you do not have a username/password, please contact Pat DeYoung, Ext #2549:

- Once you log-in, you should click:  
"Document Depot"  
"Financial Services"  
"Purchasing"
- Under that title you will find purchasing forms and documents posted on-line and available for download.

The most up-to-date copy of each form is kept on this site including: Bulk Order Forms, New Copier Order Forms and standing offers for other major supplies. If you have trouble downloading any forms please contact your school/office tech for assistance. Most forms have been created in Microsoft Office Excel 2003 and can be completed on your computer. Formulas have been built into most forms for easy completion and automatic calculation of HST. Completed forms can be e-mailed to the Finance Clerks at: [bulkordering@hrsbs.ns.ca](mailto:bulkordering@hrsbs.ns.ca) or fax to 464-2238.

## **DISPOSAL OF SURPLUS ITEMS**

Surplus items must be disposed of through Purchasing Division. A list of surplus items may be forwarded to Purchasing Division at any time. Purchasing will advertise surplus items to schools and offices within the Board. Surplus items that were purchased with Board funds will be passed on to other schools/offices at no cost. Surplus items that were purchased with school-based funds may be sold or given to other schools/offices. Delivery can be arranged through the Operations Department if time and resources are available.

If schools or offices within the board have no need of surplus items, they can be advertised via newsletter or local newspaper and sold to the highest bidder. *Funds raised from surplus items must be sent to 90 Alderney for deposit into the appropriate school or office Board Account.*



## **PURCHASING GUIDE**

*Purchasing Division  
90 Alderney Drive  
Dartmouth NS., B2Y 4S8  
(902) 464-2000  
Fax: (902) 464-2238*

*Peter Chaffey  
Purchasing Manager, Ext #2010*

<i>Debbie Beck, Buyer</i>	<i>Ext #2011</i>
<i>Margaret Johnson</i>	<i>Ext #2343</i>
<i>Mary Kay MacKintosh</i>	<i>Ext #2477</i>
<i>Ana Toghlajian</i>	<i>Ext #2021</i>

<i>E-Mail:</i>	<a href="mailto:pchaffey@hrsbs.ns.ca">pchaffey@hrsbs.ns.ca</a>
<i>E-Mail:</i>	<a href="mailto:dbeck@hrsbs.ns.ca">dbeck@hrsbs.ns.ca</a>
<i>E-Mail:</i>	<a href="mailto:mjohnson@hrsbs.ns.ca">mjohnson@hrsbs.ns.ca</a>
<i>E-Mail:</i>	<a href="mailto:mkmackintosh@hrsbs.ns.ca">mkmackintosh@hrsbs.ns.ca</a>
<i>E-Mail:</i>	<a href="mailto:atoghlajian@hrsbs.ns.ca">atoghlajian@hrsbs.ns.ca</a>