



Procurement and Purchasing Policy

1. Purpose

This policy outlines responsibilities and the process to be followed when developing, implementing, and monitoring procurement and purchasing.

2. Policy Statement

The Chignecto-Central Regional School Board (the “Board”) believes that its requirements for goods, services, construction and facilities must be met:

- in an open, fair, consistent, transparent and cost-effective manner;
- within the context and limitations of the Board’s annual budget; and
- such that students benefit from the best quality physical resources and services at maximum value for cost.

3. Principles

Chignecto-Central Regional School Board will operate using 5 key principles.

Accountability

The Board must be accountable for the results of their procurement decisions and the appropriateness of the processes.

Transparency

The Board must be transparent to all stakeholders. Wherever possible, stakeholders must have equal access to information on procurement opportunities, processes and results.

Value for Money

The Board will maximize the value they receive from the use of public funds. A value-for-money approach aims to deliver goods and services at the optimum total life-cycle cost.

Quality Service Delivery

Front-line services provided by the Board, such as teaching, must receive the right product, at the right time and in the right place.

Process Standardization

Standardized processes remove inefficiencies and create a level playing field.

4. Binding Authorities

The Board recognizes that procurement and purchasing practices must be consistent with the requirements under:

- The Education Act
- All Relevant Trade Agreements, e.g. The Atlantic Canada Procurement Agreement; The Canadian Free Trade Agreement, etc.
- The Public Procurement Act

5. Authorization

The Superintendent (or designate) is responsible to prepare, implement and monitor administrative procedures to meet the objectives of this policy.



Procedures: Procurement and Purchasing

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1.0 Definitions

Alternative Procurement Practices (ALTP)

Specialized or exceptional practices that allow for deviation from the procurement processes that the value or nature of the goods, services or construction would normally require. This could include a non-competitive procurement in the place of a competitive process, and a limited competition in the place of an open competition.

Atlantic Standard Terms and Conditions/Other Conditions

Standard instructions that support competitive tenders issued by the four Atlantic Provinces for goods and services. Supplements may be added if and when required. CCRSB will issue Other Conditions, as required.

Best Value

In order to establish best value, bids may be evaluated not only on purchase price and life cycle cost considerations, but also taking into account items such as environmental considerations, social considerations, delivery, servicing, and the capacity of the supplier to meet other criteria as stated in the bid documents

Bid

A submission in response to a solicitation document.

Bidder

A supplier that submits a bid.

Competitive Process

A process for soliciting competitive bids from suppliers and includes an open competition, an invitational competition and a limited competition.

Construction

The construction, reconstruction, demolition, repair, or renovation of a building, structure, road or other engineering or architectural work, but does not include the professional consulting services related to the construction contract unless they are included in the procurement.

Construction Contract Guidelines

Province of Nova Scotia standard instructions developed in consultation with the Construction Association of Nova Scotia that support construction tenders.

Department

A department, office or school created by or pursuant to the Public Service Act.

Goods

Materials, furniture, merchandise, equipment, stationery and other supplies required by CCRSB for the transaction of its business and affairs, and includes services that are incidental to the provision of such supplies.

Facilities (also referred to as Building Leases)

All building lease requirements covering the conveyance of the right to use tangible building property for a specified period of time in return for rent.

Invitational Competition

A competitive process in which an invitation to submit bids is issued to at least three (3) suppliers.

Life Cycle Costing

A type of analysis that goes beyond the purchase price and also considers the costs of items such as shipping and packaging, disposal of packaging, energy use, maintenance, warranty, parts and repairs, consumable supplies, disposal, training, etc.

Limited Competition

An alternative procurement practice that may be used where the circumstances permit the procurement of goods, services or construction through an invitational competition when an open competition would otherwise be required.

Major Project

A procurement project of a value, complexity, risk level or profile that requires a significant allocation or attention and time and may require the involvement of multiple stakeholders.

Non-Competitive Procurement

The procurement of goods, services or construction outside of a competitive process, but does not include the procurement of goods, services or construction from a standing offer provided the procurement falls within the terms and any monetary thresholds applicable to the standing offer.

Nova Scotia Procurement Manual

A series of Province of Nova Scotia protocols to provide detailed guidance to procurement processes.

Nova Scotia Procurement Web Portal

The website maintained and operated to facilitate the procurement process (to include posting of public tender notices).

Open Competition/Public Tender Thresholds

The solicitation of bids through a publicly posted solicitation document.

Open Competition Thresholds

The monetary values set out in the Procurement of Goods, Services and Construction section of this policy above which goods, services or construction are to be procured through an open competition.

Procurement

Procurement means the acquisition by any means, including by purchase, rental, lease or conditional sale, of goods, services, construction or facilities, but does not include:

- any form of government assistance such as grants, loans, equity infusion, guarantees, or fiscal incentives
- government provision of goods and services to persons or other government organizations.

For purposes of this definition Procurement also includes what can be referred to as “Reverse Procurements”. A Reverse Procurement is any transaction where tangible or intangible public resources are made available to be used, consumed, or sold by the CCRSB in return for a fee, service or other form of valuable benefit. The award approval processes which apply to reverse procurements are the same as those for regular procurements with the exception that departments are required to select the best value tender for award or seek the approval of the Purchasing Manager (or designate).

Procurement Activity

The acquisition of all goods, services, construction, or facilities procured by purchase, contract, lease, or long term rental.

Procurement Advisory Group

The advisory group established by the *Public Procurement Act* to provide advice and recommendations to advance the goals of the Act.

Procurement/Purchasing Employees

Purchasing employees are responsible for consistently applying this policy and all protocols to all procurement projects.

Purchasing employees must clearly understand their obligations and responsibilities under this policy and all applicable protocols and consult with the Director of Financial Services in respect of any questions regarding the application or interpretation of this policy or any protocols.

Purchasing employees are expected to provide procurement services in an efficient and diligent manner, and are encouraged to develop and foster productive and cooperative professional relationships with their colleagues.

Procurement Project

Any procurement of goods, services or construction with a value above open competition thresholds, except where the procurement is made through an existing standing offer, in accordance with this policy and applicable protocols.

Procurement Project Plan

A comprehensive plan to be completed for every procurement project.

Procurement Value

The value of the total contract excluding taxes but including all options whether exercised or not. For Facilities this value is determined by the monthly lease/rent times the term of the contract. The dollar amounts refer to a “procurement value” which is the total financial commitment (excluding taxes) of the Board resulting from a procurement of similar goods, services, construction or facilities at one time.

Public Procurement Act (PPA)

An Act outlining the rules related to the procurement activity of all public sector entities in the Province of Nova Scotia.

Public Sector Entity

A department, Crown corporation, health authority, school board or any other entity designated in the regulations under the Shared Services Act as a public sector entity.

Public Solicitation/Tender

Please refer to Open Competition.

Public Tender Notice

Notice of intended procurement for goods, services, construction, or facilities obtained through public advertisement.

Quote

A statement or listing from a supplier of the price for goods, services, construction or facilities.

Selected Supplier

A vendor who has responded previously to a solicitation, within the previous twelve (12) months, and had submitted the lowest competent bid for the good/service/construction. The vendor will provide the Board with the good/service/ construction for a price equal to or less than such tendered price.

Services

Services required by CCRSB for the transaction of its business and affairs, including professional consulting services, but does not include services provided by an employee through a personal services contract.

Solicitation Document

The document used to solicit bids from bidders.

Standing Offer

A continuous offer from a pre-approved supplier to supply goods and/or services, as requested, through the use of a call-up process during a particular period of time, at a predetermined price or discount, generally within a pre-defined dollar limit. For clarity, this also includes contracts established through the managed service provider (MSP) program.

Statutory Monopoly

An enterprise that in any relevant market has been designated by law or by governmental authority as the sole provider of a good or service.

Supplier

A person carrying on the business of providing goods, services and construction.

Sustainable Procurement

A holistic approach to procurement that considers the environmental, economic and social factors related to the goods, services and construction that are procured.

Tender (also referred to as a solicitation, bid or proposal)

A supplier's response to a tendering procedure.

Tendering Procedures (also referred to as Procurement Processes)

The processes by which suppliers are invited to submit a tender, a proposal, or a cooperative business solution and includes the ways in which those tenders, proposals, or information submissions are treated.

2.0 Scope

Policy #FS-01 and these Administrative Procedures apply to all procurement activity by or on behalf of the Board.

3.0 Procurement Project Planning

3.1 Effective project planning is essential to ensuring effective results and limiting risk. The exception to this would be in the case of an Emergency Procurement (Section 4.1.10.4, page 9) as outlined in the Emergency Procurement section of this policy. Sufficient time must be set aside to properly plan for a procurement project.

4.0 Procurement Processes

4.1 There are different methods of procurement, which are utilized to acquire goods, services, construction and/or facilities. There are many factors, which determine which method is to be used including the requirements of these procedures, the urgency of the requirement, estimated dollar value, complexity of requirement, quantities required, commercial availability and source of supply. All of these factors will influence the procurement strategy and the selection of the best method of procurement in a given situation. Below are various methods of procurement.

4.1.1 No-Negotiation Request for Proposal (RFP)

Used to procure goods, services or construction where specifications or requirements are well-defined, contract terms are clear and Bidder ranking is based on highest score.

4.1.2 **Negotiated Request for Proposals (NRFP)**

Used to procure more complex goods, services or construction where Bidder responses may help inform the final specifications or performance terms, and Bidder ranking is based on highest score. The template allows for contract negotiation with the selected Bidder. It is recommended for Open Competitions for complex Services, and may be considered for Open Competitions for complex Goods. There are two versions of the NRFP template:

- 1) Consecutive Negotiations
- 2) Best and Final Offer (BAFO)

4.1.3 **Request for Supplier Qualifications (RFSQ)**

There are two versions of the RFSQ template:

4.1.3.1 To prequalify Suppliers in the first stage of a two-stage Open Competition. Bidders who meet the requirements of the RFSQ are eligible to participate in the second stage and are invited to respond to a subsequent Solicitation Document such as an RFQ/RFC or RFP.

4.1.3.2 To establish Standing Offers for the provision of Goods, Services or Construction as required over a period of time.

4.1.4 **Request for Quotation (RFQ)**

Used to procure Goods, Services or Construction where specifications or requirements are well-defined, contract terms are clear, and Bidder ranking is often based on lowest price.

4.1.4.1 RFQ is recommended for Invitational Competitions where quotes are solicited from a limited number of Suppliers and for Open Competitions where the specifications and submission requirements are simple and straightforward.

Two separate versions are maintained:

- 1) Invitational Competitions
- 2) Open Competitions/Public Tender

4.1.5 **Request for Standing Offer (RSO)/Request for Construction (RFC)**

A RSO is a public solicitation to provide commonly used goods or services. The term of the standing offer can vary in duration but will be clearly defined in the solicitation documents. The RFC relates to construction and building related projects. RSOs/RFCs may include evaluation criteria depending on the requirement.

4.1.6 **Request for Information (RFI)**

Used to conduct structured and transparent market research where Supplier expertise is needed to define requirements or ascertain the availability of specific goods, services or construction. RFI seeks types of information such as comparative costing of environmentally certified products; innovations in the marketplace; and alternative technologies, solutions and approaches. It may also be used to solicit expressions of interest from Suppliers. RFI is not intended to directly result in the procurement of goods, services or construction, but rather it is intended to inform of future procurement.

4.1.7 **Unsolicited Proposals**

Any unsolicited proposals received should be forwarded to Purchasing to assess the merit of the proposal, and will only be considered in the context of the Alternative Procurement Practices (ALTP) justifications found in the Nova Scotia Procurement Manual. All unsolicited proposals must be authorized by the Director of Financial Services or the Superintendent of Schools.

4.1.8 **Cooperative Procurement**

CCRSB personnel are encouraged to look for opportunities to collaborate with government agencies when the arrangement may result in overall cost savings or other substantial advantages. Joint procurement may be appropriate to procure commonly used goods or services such as custodial supplies, tires, etc.

4.1.9 **Strategic Sourcing**

Schools/departments may, in special circumstances and in consultation with Purchasing, consider the use of a source list of suppliers that can supply specific goods or services, approved on their ability to meet the end users requirements. A request must be made to Purchasing regarding the establishment of a source list, and Purchasing will make the final determination of the validity of the request and establish appropriate thresholds. Thresholds will not exceed the values permitted by applicable trade agreements. Procedures on the usage and limits of source lists will be made available to users.

4.1.10 **Alternative Procurement Practices**

To balance the need to be open and competitive with the demands of urgent, specialized or exceptional circumstances, Alternative Procurement Practices are used under specific justifications in accordance with the alternative procurement practices protocol found in the Nova Scotia Procurement Manual. Alternative procurement practices must not be used to avoid competition between suppliers or to discriminate against specific individuals or groups of suppliers.

4.1.10.1 Authorized CCRSB personnel are required to sign the request for an alternative procurement practice.

4.1.10.2 The use of alternative procurement practices must be authorized by the Director of Financial Services or designate. The rationale permitting the alternative procurement practice will be documented on an appropriate form and will provide substantiation for the actions taken. This form must also indicate whether or not the circumstance is supported by Purchasing. Any disagreement between Purchasing and the Department with respect to the approval of an Alternative Procurement Practice are to be reviewed and discussed by the Director of Financial Services and the Director of the appropriate department. Directors are responsible and accountable for any decision to authorize or proceed with a procurement process or transaction that does not have the approval of Purchasing. (All documents must be filed and maintained for audit purposes.)

4.1.10.3 Permanent Exemptions - Public sector entities may apply for a permanent exemption for certain goods or services that are considered at the sole discretion of Purchasing not to be subject to tender. Any such request must be authorized by the Director or designate of the Department and the Director of Financial Services or designate. A list of permanent exemptions will be made available through routine access to information.

4.1.10.4 Emergency Procurement - Where an urgent need arises due to an immediate risk to the safety or health of employees or the general public or because of the possibility of serious damage to public or private property, the Purchasing Manager is authorized to procure the necessary goods, services or construction as he or she determines appropriate. In doing so, the Purchasing Manager should take into account and fulfill the objectives and requirements of this policy to the extent possible under the circumstances.

4.2 Exceptions

In the event of a situation which requires amendment to one (or more) of the defined purchasing processes, purchasing or procurement shall only proceed with the approval of the Director of Financial Services and/or the Superintendent of Schools.

5.0 Purchase Thresholds

5.1 If no pricing tender exists for a spending category, CCRSB must procure goods, services and construction over \$2,500 in accordance with the following Low Value Procurement and High Value Procurement sections (all values excluding taxes).

5.2 Dividing procurement activity to reduce or keep the procurement value below certain thresholds is not permitted. If a department anticipates making multiple purchases of the same requirement, the total value of all anticipated purchases must be used to determine the appropriate procurement process. For purchases which contain a Good and Service component, the procurement is classified based on the largest portion of spend.

5.3 Departments are responsible for ensuring all appropriate internal approvals are obtained and internal processes are followed prior to engaging in any procurement activity. With respect to the procurement of goods, services, construction and facilities by or on behalf of the Board, the criteria shall apply in accordance with the procedures noted in sections 5.4, 5.5, 5.6 and 5.7.

5.4 Low Value Procurement (Greater than \$2,500)

Goods	up to and including	\$25,000
Services	up to and including	\$50,000
Facilities	up to and including	\$50,000
Construction	up to and including	\$100,000

5.4.1 For all low value procurement activity with a procurement value as outlined above (excluding taxes), CCRSB personnel are expected to follow the procedures set out below. CCRSB personnel are expected to obtain bids either by open/invitational competition wherever possible and award to the bid that provides the best value. The exception to this would be the use of an Alternative Procurement practice, as outlined in the Alternate Procurement Practices section of the Nova Scotia Procurement Manual.

5.4.2 For goods, services or construction below \$2,500, quotes are not required.

- 5.4.3 CCRSB will issue a solicitation to a minimum of three (3) suppliers, if possible. While CCRSB personnel are expected to invite only qualified suppliers, they are not to consistently invite bids from only one or a select group of suppliers. Invitations and bidding opportunities are to be equitably distributed among all potential bidders in an area, and all interested and qualified suppliers are to be evaluated on a consistent and equitable basis. Where increased competition is appropriate, CCRSB personnel may choose to publicly tender for goods, services, construction or facilities that fall within the above thresholds.
- 5.4.4 Purchases of goods, services or construction with a total procurement value of less than \$2,500 (excluding taxes) – including the site-based purchase order – may be acquired by single source.
- 5.4.4.1 The initiator of the purchase shall:
- Prepare a requisition
 - Charge purchase requisition to the appropriate account in the Board’s financial system.
 - Obtain approval from the Principal/Work-site Supervisor/Coordinator/Director (or designate).
 - After approval is received, release requisition.
- 5.4.4.2 The Principal/Work-site Supervisor/Coordinator/Director (or designate) shall:
- Review the purchase document.
 - If purchase is recommended, approve purchase and forward to initiator.
- 5.4.4.3 For all requisitions received, the Purchasing Manager (or designate) shall:
- Process requisition by assigning a purchase order number.
 - Review purchase order and check for accuracy.
 - Obtain authorized signature(s).
 - Distribute purchase order copies to vendor, requisitioner and accounts payable.
- 5.4.4.4 Upon receipt of goods/services, the Principal/Work-site Supervisor/Coordinator /Director (or designate) shall:
- Check goods received/service(s) provided for completeness, condition, compliance with purchase order, etc.
 - Process “Receiving Copy” of purchase order; and
 - Submit to the Board’s Accounts Payable office for payment.

- 5.4.4.5 Accounts Payable staff shall:
- Match purchase order and supplier invoice;
 - Apply payment data to appropriate account in Board's financial system;
 - Issue payment to supplier; and
 - File documentation.

- 5.4.4.6 When site-based purchase orders are used, the authorized person shall:
- Verify that the purchase complies with the Board's approved budget;
 - Complete the purchase order, specifying the proposed budget allocation;
 - Provide the supplier/vendor with "Supplier Copy";
 - Retain and file the "Requisitioner Copy"; and

- 5.4.4.7 Attach "Finance Copy" to supplier invoice and submit to Board's Accounts Payable Office. Upon receipt of "Finance Copy" of purchase order and supplier invoice, Accounts Payable staff shall:
- Review "Finance Copy" and supplier invoice for accuracy;
 - Apply payment data to appropriate account in Board's financial system;
 - Issue payment to supplier; and
 - File "Finance Copy", supplier invoice and a copy of payment document.

- 5.5 For purchases of: goods, services and facilities, and construction with procurement values (excluding taxes) as follows:

1. Goods of \$2,500 up to and including \$25,000;
2. Services and facilities of \$2,500 up to and including \$50,000
3. Construction of \$2,500 up to and including \$100,000 shall be acquired from:

- a standing offer or
- an attempt to obtain, as far as practicable, at least three (3) quotes and award to supplier offering best value or
- a public solicitation when increased competition is appropriate.

5.5.1 For goods, services or construction valued over \$2,500 but under the limits set out above, the following processes should be adhered to:

5.5.1.1 The initiator of the purchase shall:

- Prepare a requisition
- Charge purchase requisition to the appropriate account in the Board's financial system.
- Obtain approval from the Principal/Work-site Supervisor/Coordinator/Director (or designate).
- After approval is received, release requisition.

5.5.1.2 The Principal/Work-site Supervisor/Coordinator/Director (or designate) shall:

- Review the purchase document.
- If purchase is recommended, approve purchase and forward to initiator.

5.5.1.3 For all requisitions received, the Purchasing Manager (or designate) shall:

- Process requisition by assigning a purchase order number.
- Ensure that proper approvals from the Worksite Supervisor/Principal/ Coordinator/ Director (or designate) are received prior to having purchase order authorized.
- Review purchase order and check for accuracy.
- Check vendor files to determine if requested item(s) are available from a selected supplier(s) and, if so, advise Principal/Work-site Supervisor/Coordinator/ Director (or designate) of the preferred supplier.
- If Principal/Work-Site Supervisor/Coordinator/Director (or designate) agrees to purchase from selected supplier, the Purchasing Manager (or designate) shall revise purchase order accordingly.

5.5.1.4 If Principal/Work-site Supervisor/Coordinator/Director (or designate) disagrees with purchase from selected supplier, the Purchasing Manager (or designate) shall:

- Obtain at least three (3) quotes, as far as practicable, from suppliers or issue a public solicitation when increased competition is appropriate. Advise Principal/Work-Site Supervisor/Coordinator/Director (or designate) of prices/supplier information received as a result of the foregoing.
- In consultation with Principal/Work-site Supervisor /Coordinator /Director (or designate), decide upon supplier.

- Award to supplier offering best value
- Proceed with purchase by releasing purchase order.
- Obtain authorized signature (Purchasing Manager, Director of Financial Services or Superintendent of Schools (or designate).
- Distribute purchase order copies to vendor, requisitioner and accounts payable.

Note: for purchases with a total value of \$10,000 or greater, the Purchasing Manager (or designate) must submit Purchase Order to Director of Financial Services or Superintendent of Schools (or designate) for authorization.

5.5.1.5 Upon receipt of goods/services, the Principal/Work-site Supervisor/Coordinator /Director (or designate) shall:

- Check goods received/service(s) provided for completeness, condition, compliance with purchase order, etc.
- Process “Receiving Copy” of purchase order; and
- Submit to the Board’s Accounts Payable office for payment.

5.5.1.6 Accounts Payable staff shall:

- Match purchase order and supplier invoice;
- Apply payment data to appropriate account in Board’s financial system;
- Issue payment to supplier; and
- File documentation.

5.6 High Value Procurement

Goods	over	\$25,000
Services	over	\$50,000
Facilities	over	\$50,000
Construction	over	\$100,000

5.6.1 CCRSB personnel must work with Purchasing to conduct a public tender/open competition process.

5.6.2 Procurement must review and approve the final solicitation document before an open competition is initiated.

- 5.6.3 All procurement activity with a procurement value over the thresholds (excluding taxes) outlined above must be obtained through a public solicitation/open competition. The only exception would be when CCRSB personnel are using an Alternative Procurement Practices (as defined in the Nova Scotia Procurement Manual) or is accessing a publicly tendered standing offer. All public solicitation opportunities must be posted on the Province of Nova Scotia Procurement Web Portal. CCRSB personnel may wish where appropriate to also advertise in local, provincial, or national media; however, there is no obligation to do so.
- 5.6.4 In addition, a notice of solicitation opportunity may be sent to selected suppliers where required to ensure an adequate degree of competition.
- 5.7 For purchases of: goods, services and facilities, and construction with procurement values (excluding taxes) as follows:
1. goods over \$25,000;
 2. services and facilities over \$50,000
 3. construction over \$100,000
- shall be acquired from:
- a standing offer or
 - a public tender/open competition.
- 5.7.1 The initiator of the purchase shall:
- Prepare a requisition; and
 - Obtain approval from the Principal/Work-site Supervisor/Coordinator/Director (or designate) for approval.
 - Purchase requisition is charged to the appropriate account in the Board's financial system.
- 5.7.2 The Principal/Worksite Supervisor/Coordinator/Director (or designate) shall:
- Review the requisition.
 - If purchase is recommended, approve requisition.
 - Forward approved requisition to the appropriate person for inputting.
- 5.7.3 For all requisitions received, the Purchasing Manager (or designate) shall:
- Process requisition by assigning a purchase order number.
 - Ensure that proper approvals from the Worksite Supervisor/Principal/Coordinator/ Director (or designate) are received prior to having purchase order authorized.
 - Review purchase order and check for accuracy.
 - Check vendor files to determine if requested item(s) are available from a selected supplier(s) and, if so, advise Principal/Work-site Supervisor/Coordinator/Director (or designate) of the preferred supplier.

- If Principal/Work-Site Supervisor/Coordinator/Director (or designate) agrees to purchase from selected supplier, the Purchasing Manager (or designate) shall revise purchase order accordingly.
- 5.7.4 If Principal/Work-site Supervisor/Coordinator/Director (or designate) disagrees with purchase from selected supplier, the Purchasing Manager (or designate) shall:
- Issue a public solicitation.
 - Prepare specifications for proposed goods/service/construction.
 - Refer (as appropriate) specifications to Director of Financial Services for review/revision/confirmation.
 - Issue solicitation and post solicitation on the Nova Scotia Procurement Web Portal.
 - Receive/stamp (date/time received) and file all bids/tenders.
 - Hold bid/tender opening meeting (on date/time scheduled) and open all bids/tenders.
 - Following bid/tender opening meeting, prepare analysis (spreadsheet) of bids/tenders.
 - Inform appropriate Principal/Work-site Supervisor/Coordinator/Director of analysis results and determine successful bidder.
- 5.7.5 The Purchasing Manager (or designate) shall:
- Update purchase order, if required.
 - Ensure authorized signature (Director of Financial Services or Superintendent of Schools (or designate)), are obtained.
 - Proceed with purchase by releasing purchase order.
 - Distribute purchase order copies to vendor, requisitioner and accounts payable.
 - Post winning bidder and contract value, if applicable on the Province of Nova Scotia Procurement Web Portal.
- 5.7.6 Upon receipt of goods/services/construction, the Principal/Work-site Supervisor/Coordinator/Director (or designate) shall:
- Check goods received/service(s) provided for completeness, condition, compliance with purchase order, etc.
 - Process “Receiving Copy” of purchase order; and
 - Submit to the Board’s Accounts Payable office for payment.
- 5.7.7 Accounts Payable staff shall:
- Match purchase order and supplier invoice;
 - Apply payment data to appropriate account in Board’s financial system;
 - Issue payment to supplier; and
 - File documentation.

6.0 Bid Opening, Evaluation and Award

6.1 Bid Openings

Bids are accepted in accordance with the closing time, date and place stipulated in the bid request documents. The list of companies that submitted a bid and pricing (if applicable) will be posted on the Province of Nova Scotia Procurement Web Portal.

6.2 Bid Evaluation

All bids are subject to evaluation after opening and before award of contract. The bid request documents must clearly identify the requirements of the procurement, the evaluation method, evaluation criteria based on the purpose and objectives of the procedures, and the weights assigned to each criterion. When evaluating the bids the evaluator(s) shall obtain best value.

6.3 Award Notification

After a contract has been entered into pursuant to an open competition, Purchasing will post the name of the successful supplier and the value of the awarded contract on the Nova Scotia Procurement Web Portal. For open competitions resulting in the award of a standing offer contract, only the name of the successful bidder(s) will be published.

For contracts entered into after a limited competition or for a high value non-competitive procurement, Procurement will post the name of the successful supplier and the value awarded on the Nova Scotia Procurement Web Portal as is required under applicable trade agreements.

CCRSB is responsible for notifying bidders of the outcome of an invitational competition.

7.0 Contract Negotiations and Approvals

7.1 Contract Negotiations

Where the solicitation document provides for negotiation to take place Procurement may engage in negotiations with potential suppliers. Any proposed changes to the standard contract terms and conditions may be reviewed, as required, by the CCRSB solicitor prior to finalizing the contract.

7.2 Contracting Approval and Signing Authority

CCRSB is responsible for approving and entering into contracts with suppliers for goods, services and construction, including issuing purchase orders and signing agreements.

7.3 A contract must not be entered into unless all procurement approvals, as required by this policy and applicable procedures and protocols, have been obtained. CCRSB must maintain an updated and easily accessible record of the delegation of contract approval and signing authority to particular individuals.

7.4 Original contracts are to be retained by CCRSB.

8.0 Supplier Debriefing

8.1 Bidders in both open and invitational competitions may request a debriefing of their submission. When requested, debriefings must be scheduled with and conducted in accordance with the Bidder Debriefing Protocol found in the Nova Scotia Procurement Manual.

9.0 Procurement Complaint Process

9.1 Subsequent to a debriefing, bidders may file a complaint regarding the outcome of a procurement process. Complaints must be made by bidders and responded to by the Purchasing Manager/Director of Finance in accordance with the Procurement Complaint Protocol found in the Nova Scotia Procurement Manual.

10.0 Contract Management and Supplier Performance Evaluation

10.1 Establishing contract management practices, and assessing supplier performance are both critical to the success of procurement projects. Poor workmanship, service, materials, unnecessary contract delays and unsafe work practices will not be tolerated. Contracts and standing offers will be managed in accordance with the Contract Management Protocol, Supplier Performance Evaluation Protocol and Standing Offer Protocol found in the Nova Scotia Procurement Manual.

11.0 Supplier Disqualification

11.1 Suppliers can be disqualified from participating in future procurement opportunities for any one of the following:

- Failure to honour a bid
- Failure to disclose a conflict of interest
- Unethical bidding practices
- Convicted of bid rigging, price fixing or collusion
- Inadequate performance

12.0 Obligations under the Procurement Act

12.1 In addition to the areas already covered by this Policy, the following are additional obligations of the *Public Procurement Act* that the CCRSB personnel are required to adhere to with their Procurement practices.

13.0 Terms and Conditions

- 13.1 Every public solicitation notice must reference the terms and conditions that govern the purchase of goods, services, construction or facilities. The terms and conditions of every public solicitation notice will be the CCRSB Terms and Conditions Goods and Services which are consistent with the Atlantic Standard Terms and Conditions for the procurement of goods, services, or facilities and the Construction Contract Guidelines developed in collaboration with the Construction Association of Nova Scotia for the procurement of construction. CCRSB will also include Other Conditions, as required.

14.0 Posting Tender Notices

- 14.1 All public tender/open competition opportunities must be posted on the Province of Nova Scotia Procurement Web Portal.

15.0 Conflict of Interest

- 15.1 All procurement activity must be conducted with integrity so as to maintain the public's trust.
- 15.2 Internal Conflict of Interest - All participants in a procurement process, including all employees of Procurement and public sector entities and all members of the evaluation team, must ensure that there are no undeclared internal conflicts of interest. Evaluation team members to sign conflict of interest declarations stating they have no conflict of interest with respect to the procurement process.
- 15.3 Bidders' Conflict of Interest - All bidders will be required to declare that there are no conflicts of interest or provide details for any actual or apparent conflicts of interest at the time of bid submission.
- 15.4 Procurement to ensure that all procurement templates include appropriate conflict of interest language and declarations.

16.0 Confidentiality and Access to Information

- 16.1 Confidentiality - Supplier information submitted in connection with a procurement process must be adequately protected.
- 16.2 Access to Information - CCRSB is subject to the Freedom of Information and Protection of Privacy Act. Procurement and public sector entities must be aware of and manage their obligations in respect to the maintenance, release and management of all procurement records.

- 16.3 Personal Information Disclosure - CCRSB must be aware of the requirements under the Personal Information International Disclosure Protection Act of Nova Scotia.

17.0 Other

- 17.1 *Policy Posting* – CCRSB personnel will ensure this policy is posted on the CCRSB website.
- 17.2 *Supplier Development Activities* – CCRSB personnel will make every attempt where appropriate to participate in vendor outreach activities and professional development programs as requested by the Procurement Governance Secretariat.
- 17.3 *Regulations* – CCRSB personnel will make sure that procurement practices remain consistent with any regulations that are adopted under the *Public Procurement Act*.
- 17.4 *Competition Bureau of Canada* – CCRSB personnel will take steps to become familiar with the Competition Bureau of Canada bid rigging awareness and prevention guidelines and adopt applicable practices.

18.0 Additional Procurement Procedures

18.1 Purchasing Card

These cards may be issued at the request of a Coordinator or Work Site Supervisor and upon the approval of the Department Director and the Purchasing Manager or designate; any disputes as to approval shall be determined by the Director of Financial Services.

- 18.2 Prior to receiving the card, the Purchasing Manager (or designate) will meet with cardholders, for a review. The cardholder will be required to sign the Purchasing Card Procedures Guidebook.
- 18.3 Purchasing cards shall be used by Board employees to improve payment processes. Purchasing cards have various transaction and monthly limits.
- 17.4 The cardholder shall use the card only to purchase goods or services within the cardholder's limits. All transactions require the approval of the person responsible for the applicable budget.
- 17.5 The cardholder shall:
- Purchase goods to their individual transaction/monthly limit only.
 - Keep all receipts.
 - Ensure receipts are reconciled with monthly statement.

- Have reconciled monthly statement and receipts approved by Department Coordinator/ Director (per Department guidelines).

19.0 Signing Authority

- 19.1 The Purchasing Manager (or designate) shall:
- 19.1.1 for purchases with a total value less than \$10,000 authorize purchase with signature;
 - 19.1.2 for purchases with a total value of \$10,000 or greater, submit Purchase Order to the Director of Financial Services or Superintendent (or designate) for authorization.
- 19.2 In the absence of the Purchasing Manager, the Coordinator of Financial Services (or designate) may authorize all purchase orders with a total value less than \$10,000.

20.0 Budget

- 20.1 The Manager of Budget and School Financial Services shall monitor all general ledger accounts to ensure expenditures are within approved budget.
- 20.2 All staff with budget responsibility are accountable to ensure that goods and services purchased are in accordance with the approved budget and/or within their area of accountability.

21.0 Reporting

- 21.1 A monthly report on all solicitations greater than \$10,000 will be prepared by Purchasing and forwarded to the Director of Financial Services with copies for the Financial Services Committee. This report would include information on goods/services/construction where a tender exception or an alternate procurement practice has been approved by the Director of Financial Services or the Superintendent of Schools.

22.0 Sustainable Procurement

- 22.1 Procurement maintains current knowledge of product and service standards; codes and certifications; changing market conditions; new green products; innovative technologies; and best practices in sustainable procurement. This knowledge is used to identify and implement strategies for maximizing the economic, environmental, and social value of purchases.

23.0 References

- 23.1 Procedures, protocols, and forms referred to in this policy can be found at www.ccrsb.ca and the internal site of the Nova Scotia Procurement Web Portal.
- 23.2 Public site: www.novascotia.ca/tenders

24.0 Nova Scotia Procurement Protocols

- 24.1 The purpose of this protocol is to give an overview of the requirements for a Procurement Project Plan. This protocol should be read in conjunction with the CCRSB FS-01 Purchasing Policy and Procedures and the Nova Scotia Procurement Manual.

25.0 Responsibilities

- 25.1 It shall be the responsibility of the Director of Financial Services to ensure these administrative procedures are followed.
- 25.2 Policy #FS-01 and these Administrative Procedures shall be implemented by all Board employees who initiate or authorize purchases using Board funds or are otherwise involved with management of the Board's procurement and purchasing system, including without limitation, the Purchasing Manager, each school Principal and Vice-Principal and all Supervisors, Directors, Consultants, Coordinators and Managers (including their respective designates). All Board employees who have responsibility for the procurement of goods, services, construction, or facilities must adhere to this policy. Failure to adhere may result in a temporary or permanent loss of procurement privileges or in more extreme cases result in disciplinary action and/or dismissal.