



Township of East Zorra-Tavistock

Human Resources Manual

Title: Purchasing Policy	
Section: Personnel Policies	Number: 2.06
Version: 4.0	Review Frequency: as required
Approved by: Council	Approval Date: 2007-12-19
Application: General organizational structure of the Township. Applies to all employees.	
Notes: Required by Municipal Act, 2001, Section 270(1) Updated 2012-02-15 Updated 2013-12-16 re: Accessibility Updated 2019-02-20 re: Section #19 (Purchasing Limits and Methods)	

Excerpt from the Municipal Act & Accessibility for Ontarians with Disabilities Act, 2005

270. (1) A municipality shall adopt and maintain policies with respect to the following matters:

- 3. Its procurement of goods and services.

**ONTARIO REGULATION 191/11 INTEGRATED ACCESSIBILITY STANDARDS
Section 5**

The Government of Ontario, Legislative Assembly and designated public sector organizations shall incorporate accessibility design, criteria and features when procuring or acquiring goods, services or facilities, except where it is not practicable to do so. O. Reg. 191/11, s. 5 (1); O. Reg. 413/12, s. 4 (1).

(2) If the Government of Ontario, Legislative Assembly or a designated public sector organization determines that it is not practicable to incorporate accessibility design, criteria and features when procuring or acquiring goods, services or facilities, it shall provide, upon request, an explanation. O. Reg. 191/11, s. 5 (2); O. Reg. 413/12, s. 4 (2).

Purpose

1. The Municipal Act, 2001 (the “Act”) requires that all municipalities adopt and maintain a policy with respect to its procurement of goods and services. This policy provides direction to staff and information to the public about the process that will be followed with respect to the procurement of goods and services by the Township. This policy has been developed to comply with the provisions of Section 270 of the Act.

Objectives

2. This Policy has the following objectives:
 - a. Delegate the authority to purchase;
 - b. Establish estimated cost levels to determine the methods of purchasing;
 - c. Ensure the Township obtains quality goods at a reasonable cost;
 - d. Ensure that the purchasing process is open and fair to all interested vendors;
 - e. Ensure that the purchasing process is carried out in a consistent, predictable manner by all Township Departments.

General Provisions

3. Prior to the adoption of each year’s budget, operating supplies and services purchased shall continue at the level set out in the prior year. Capital purchases shall not be made until the current year budget is approved or Council approval is obtained.
4. Purchases shall not be divided or phased to circumvent the intent and requirements of this policy.
5. In all purchases cost and quality shall be the primary factors; however, other factors may have a bearing on the final purchase decision. Notation should be made at the time of purchase on deviations from purchasing from the lowest cost source.
6. When evaluating a purchase cost, all associated costs must be considered including transportation, pickup costs, delivery charges, etc.
7. Long Term Leases and Rentals
 - a. The purchasing method and approvals required for leases or rentals shall be based on the total lease or rental obligation, not the periodic payment amount;

- b. New leases and rentals must be approved in the current year budget before entering into a lease or rental agreement;
- c. Council approval is required to enter into a lease or rental agreement prior to current year budget approval;
- d. Staff shall maintain a lease and rental registry showing the equipment, annual amount and term of all leases. This registry shall be reported to Council each year during consideration of the budget.

Purchasing Form

8. Staff shall use a Purchase Information Form for all purchases over \$5,000 and not from a Preferred Vendor. The purchase information form shall set out the date, nature of the purchase, estimated cost, vendors, quotes received and comments. Written quotes shall be attached to the form. The purchase information form shall also be used to determine Preferred Vendors. The Department Head shall sign the purchase information form to finalize the purchase. The CAO shall also sign the form approving purchases over \$10,000.

Preferred Vendor

9. A Preferred Vendor shall be used for the purchase of small items and services. Based on the nature of the service or product, staff shall periodically obtain the cost for typical purchases to determine a Preferred Vendor for different classes of products and services. Staff shall use the Preferred Vendor to obtain supplies and services without the requirement to obtain individual quotes for each supply or service.

Single Source Purchases

10. Some products and services are available only from one source. This may be the case to maintain a warranty on equipment, when service contract is in place, software support, etc. Employees shall be authorized to purchase products and services from these sources without obtaining quotations only when necessary. Employees shall continually monitor the market place to attempt to find other sources for products and services and ensure single source vendors remain competitive.

Tenders

11. Tenders shall be opened in public at the time and location specified in the tender documentation by the Department Head responsible for the tender and the CAO or designate.
12. Depending on the nature of the service or product, tenders shall be advertised in appropriate newspapers or industry publications or invited from suitable vendors.

13. The Department Head, in consultation with the CAO, shall determine whether a tender should be advertised or invited.

Request for Proposals

14. Where appropriate, the use of a Request for Proposals may be used instead of a Tender or quotes.

15. A Request for Proposals shall permit more flexibility on the part of vendors to provide creative and alternative proposals for the supply of products or services.

Less than 3 quotes or tenders

16. When a minimum of 3 quotes or tenders cannot be obtained, staff shall make a notation as to the reason(s) why less than three quotes or tenders were received and report the matter to the CAO and/or Council.

Emergency Purchases

17. Department Heads shall be authorized to make emergency purchases over \$5,000 without obtaining three quotations in the following circumstances:

- a. When there is a declared Emergency under the Emergency Plan;
- b. Storms or other natural disasters;
- c. When time constraints make it impossible to obtain quotes for supplies or services;
- d. When other operations are compromised leading the likelihood of higher costs, lost time, etc.;
- e. When an employee's or the public's health and safety is in jeopardy;
- f. When immediate minor repairs or services can prevent large costs.

Accessibility

18. When procuring goods, services and facilities, the Township of East Zorra-Tavistock will incorporate accessibility design criteria and features. Where applicable, procurement documents will specify the desired accessibility criteria to be met and provide guidelines for the evaluation of proposals in respect of those criteria. Where it is impractical for the Township to incorporate accessibility criteria and features when procuring or acquiring specific goods, services or facilities, a written

explanation, will be provided. See the attached document “Making your purchases more accessible” for more information and to assist with purchasing activities.

19. Purchasing Methods and Limits

Estimated Purchase Cost	Authority to Purchase		Purchase Method	Comments
	Before Current Year	After Current Year Budget Approval		
<\$5,000	Department Head and/or Designated Employees ¹	Department Head and/or Designated Employees	At the discretion of the employee, with preference given to a Preferred Vendor when circumstances permit.	Generally applicable for replacement items and routine service Employee must consider location, urgency to obtain the item, cost and quality
>\$5,000 and <\$10,000	Department Head ¹	Department Head ²	3 or more informal quotations from vendors selected by Department Head ³	Quotes should be documented and kept on file.
>\$10,000 and <\$25,000	Department Head & CAO ¹	Department Head & CAO ²	3 or more informal quotations from vendors selected by Department Head ³	Quotes should be documented and kept on file.
>\$25,000 and <\$50,000	Council & CAO ¹	Department Head & CAO ²	3 or more formal written quotations from vendors selected by Department Head ³	Formal bid document created that sets out the particular requirements for the goods and/or services. No requirement for sealed bids. All attempts must be made to obtain a minimum of 3 quotes.
>\$50,000	Council	Council	Sealed Tenders or RFP ^{4, 5}	Formal Tender Process with requirement of sealed bids and a public opening. For goods or services where quality and experience are a major component of the purchase, a Formal RFP Process can be utilized; document should detail out the evaluation method and criteria. Formal Tenders and RFP's need to be advertised and results posted.

Notes to above table:

- 1 - only to maintain services and programs at prior years level
- 2 - subject to being within 110% of budget and other budget areas are available to accommodate the overage, otherwise must be submitted to Council for approval with a recommendation on where the funding will come from
- 3 – written quotations can include fax, email, web site pricing, etc.
- 4 – unless an alternative purchasing method is authorized by Council
- 5 – sealed tenders must be date & time stamped when received and cannot be faxed or emailed

Township of East Zorra-Tavistock

Purchasing Information Form

Date: _____ To determine a Preferred Vendor: Yes No

Purchase Description: _____

Accessibility Considerations: _____

Estimated Cost: _____

Vendor	Amount	Comments

H & S Representative Consultation Required: Yes No

(Required for new equipment and purchases that will have an effect on processes. See H & S Policy 4.2.i)

H & S Representative Comments: _____

_____ H & S Signature: _____

Accessibility Requirements met? _____

Purchased From: _____

Comments: _____

Department Head Approval: _____

CAO Approval: _____
(over \$10,000)



Accessibility for Ontarians with Disabilities Act

Making your purchases more accessible



Organizations consider many things when making a purchasing decision, including quality, cost and environmental impact. Adding accessibility to that list can make your organization more welcoming to both customers and employees.

Requirements & deadlines

Under the Accessibility for Ontarians with Disabilities Act:

- Public sector organizations are required to **incorporate** accessibility when they make purchasing decisions. This guide will help you.
- All other organizations must **consider** accessibility when designing or buying self-service kiosks. The appendix will help you.

The requirements are phased in over time, to give smaller organizations and private companies time to prepare.

	Government of Ontario	Public sector organizations		Private sector and non-profit organizations	
		50+ employees	1-49 employees	50+ employees	1-49 employees
Accessible procurement	2012	2013	2014	N/A	N/A
Self service kiosks	2013	2013	2014	2014	2015

* Requirements come into effect on January 1 of each year

For more on what you need to do, read:

- [Incorporate accessibility when procuring goods, services and facilities](#)
- [Making self service kiosks accessible](#)

Making accessibility a priority in your purchasing practices

Incorporating accessibility into your purchasing practices doesn't have to be complicated. For example, if you use requests for proposals, vendor of record arrangements or other purchasing practices, just add accessibility design and features as part of the criteria. These steps will help you.

1. Assess your purchasing practices

If you don't think about accessibility when you buy goods and services, you may (quite unintentionally!) purchase something that someone with a disability cannot use. Building accessibility into your purchasing policy and practices helps to prevent barriers. It also shows your customers, staff and suppliers that you are committed to accessibility.

Review your purchasing practices and talk to your staff to make sure they consider accessibility when making purchasing decisions. You may also want to add a commitment to accessibility to your purchasing policy.

Sample policy statement:

When procuring goods, services and facilities, the Town of Anywhere will incorporate accessibility design criteria and features. Where applicable, procurement documents will specify the desired accessibility criteria to be met and provide guidelines for the evaluation of proposals in respect of those criteria. Where it is impractical for the Town to incorporate accessibility criteria and features when procuring or acquiring specific goods, services or facilities, the Manager of Procurement will provide a written explanation, on request.

2. Set your accessibility criteria

The law doesn't specify what accessibility criteria to use when purchasing products and services. Every organization and situation is different; so the law is flexible to help you buy what meets the needs of your organization, employees and customers.

Think about any barriers the product or service might present for people with different types of disabilities and how you can avoid them. Consider general principles of accessibility, such as:

- **Equitable:** can someone with a disability use the good, service or facility as quickly and easily as a person without a disability? For example, if you're hiring a web developer to build a website for your organization, will someone who is blind and using text-to-speech software be able to access the site?
- **Adaptable Flexible:** does the good or service accommodate a wide range of individual preferences and abilities? can a user configure the item to meet their specific needs and preferences and will it work with common assistive technologies? For example, you want to provide training to your staff – can the training be provided in a variety of formats if necessary?
- **Size and Space for Approach and Use:** Can someone - regardless of their body size, posture, or mobility - approach, reach, manipulate and use the good or facility. For example, you've purchased an accessible picnic table, but have you ensured that someone in a wheelchair can access it?
- **User-friendly:** Are the instructions perceptible and intuitive? Can someone with limited physical strength use the good? If someone makes a mistake while using the good, are the adverse consequences minimal?

Example:

When purchasing new computer monitors, Jonas required the monitors to allow users to adjust the colours and contrast, making them more accessible to people with vision loss. He also required the monitors to allow users to identify the buttons by feel and operate them with one hand with minimal force. This assists individuals with both vision and mobility limitations. Finally, he asked vendors to make sure their instructions were available in accessible formats.

Here are some accessibility criteria to consider with different types of purchases:

Type of purchase	Criteria to consider
Goods	<ul style="list-style-type: none">• Can the good be used by someone:<ul style="list-style-type: none">• in a seated position• using one hand, with limited upper body strength, or limited fine motor skills• with vision loss or low vision• with hearing loss• Does the product meet ergonomic standards and can it be customized to meet a variety of needs?• Are support materials, such as manuals, training or service calls, available in accessible formats at no additional charge?
Services	<ul style="list-style-type: none">• Does the firm provide accessible customer service, as required under the Customer Service Standard?• Can the service provider accommodate the needs of people of all abilities? For example, if you're hiring someone to conduct research, do their surveys and interviews accommodate people with different types of disabilities?• Will the company use accessible signage, audio and/or print materials? For example, if you're hiring an event coordinator, will they use high contrast signage for the event?
Facilities	<ul style="list-style-type: none">• Can someone using a mobility aid, like a wheelchair or walker, get around the facility?• Are signs placed at an accessible height?• Does the facility have emergency procedures to assist people with disabilities?

Accessibility criteria for self-service kiosks are included as an appendix, and the websites at the end of this guide can help you identify accessibility criteria for purchasing technology, office equipment and services.

Example:

Omar's business is booming, and he's opening a new office downtown. When sourcing possible locations, Omar looks for a visible alarm system to alert people with hearing loss, and elevator buttons that use raised lettering for people who are blind.

3. Include accessibility in your tender

If you are writing a request for proposal, add your accessibility criteria to the tender, along with any specific features you're looking for. Don't forget to include accessibility requirements in your evaluation process; so if you score bids on cost, quality and timeliness, give points for accessibility too.

Example:

When hiring a consultant to conduct staff training, Linda interviews the vendors on how they would accommodate the needs of people with different disabilities in their presentations. She also scores them on their ability to provide training materials in accessible formats.

What if I can't find an accessible option?

If you can't find a good, service or facility that meets your needs, look for ways to make it more accessible. If someone asks, you must explain why the option you chose isn't accessible.

Example:

Santosh is purchasing a new printer for the office, but the accessible version is not compatible with his office computer network. So he buys a printer that works with their systems, but puts it on a lower table to make it more accessible to people in wheelchairs. He makes a note that, when it's time to buy new computers, he should make sure they are compatible with other accessible technologies.

Where to find more information

- Learn more about the Accessibility for Ontarians with Disabilities Act and find free tools and templates at Ontario.ca/AccessON.
- To learn how to prevent barriers to accessibility in a wide range of goods, services and facilities, visit ontario.ca/pp30.
- Visit www.apr.gc.ca for an Accessible Procurement Toolkit that helps organizations purchase accessible information and communications products.
- The Accessibility Assistant features accessibility criteria for a wide range of products at http://accessibility.gtri.gatech.edu/assistant/assistant_home.php.
- Incorporate accessibility criteria in all stages of your procurement practices, including writing and assessing tenders at www.universaldesign.ie/useandapply/ict/itprocurementtoolkit.

please note: This guide is not legal advice. If you require assistance in interpreting the legislation or the regulation, please contact your legal adviser. This guide has been created to help you understand the legislation and/or regulation and does not replace the official version of the Integrated Accessibility Standards Regulation, Ontario Regulation 191/11 and the Accessibility for Ontarians with Disabilities Act, 2005 (AODA). If there is any conflict between this guide and the Integrated Accessibility Standards Regulation or the AODA, the regulation and the AODA are the final authorities.

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Appendix

Accessible self-service kiosks

Interactive electronic kiosks are everywhere – from scanners used to check prices, to ticket vending machines and grocery checkout stations. Accessibility features make kiosks easy for everyone to use, not just people with disabilities. For example, a self-service checkout that “beeps” when it reads a barcode helps customers scan items faster – including customers who can’t read the display screen.

Here are some tips to help you design or purchase an accessible kiosk.

User controls

- Controls should be visible whether someone is standing or sitting.
- Make controls easy to use with one hand, without a lot of force, and without having to grasp tightly, pinch or twist.
- Avoid steps, bins or signage that could block someone with a walker or wheelchair.

Display screens

- Use high contrast colours. Try a dark blue and matte white, black and white or yellow and black.
- Avoid flashing images and limit flashes to no more than three times in one second.
- Screens should be bright enough to be read under different types of lighting.
- Use a material that isn’t reflective and position the screen to minimize reflections (from sunlight or overhead lights).
- Make sure touch screens work with prosthetic limbs and pointing devices.

Pin pads

- Use a telephone style pin pad (with 1 in the top left). The 5 should be in the centre and marked with a raised dot and the OK/Enter button should be in the lower right corner.
- Make sure there is space between the keys and that the pad's edges are clearly defined.
- Pin pads should be angled (not flat) to accommodate users whether they are standing or sitting.
- Keys should have a low glare surface (sandblasted aluminum or stainless steel are good options).

Card readers

- Make the card slot easy to find by highlighting it with strong colours or an indicator light.
- If it's a swipe reader, position it vertically and let users swipe up or down. Using a two-headed swipe reader is best, as it doesn't matter which way the card's stripe is facing.
- If needed, use a tactile illustration to show how to insert the card.
- Let users know their card was accepted (or rejected) with both audible and visible feedback.

Scanners

- Users should be able to identify the scan area by touch.
- Handheld scanners should have a cradle that allows customers to move the product past the scanner without having to pinch, twist or grasp the scanner tightly.
- Light from the scanner must not shine in the user's eyes.
- Confirm successful scans with both audible and visible feedback.

Instructions

- Instructions should be available in both a visual and audio format. Allow users to turn the audio off and/or include an earphone jack if your instructions reveal personal information.
- Use mid-frequency tones since some people can't hear high- or low-pitched sounds.
- Avoid acronyms, abbreviations and jargon. Make instructions simple and easy for all users to understand, including people with learning or cognitive disabilities.
- Use sans serif fonts and make sure it's easy to tell characters apart (e.g. X from K, 1 from l, O from Q, U from V).
- Don't rely on colour alone to guide users (e.g. don't say 'touch the green square'). Use descriptive text or icons as well.
- Avoid time limits if you can; otherwise warn users when the deadline approaches and let them extend it.