

Topic:	Disposal of Surplus and Obsolete Assets
Effective:	February 2004
Cross-Reference:	HDSB Code of Ethics Policy; HDSB Administrative Procedures: Code of Ethics; Procurement; School Generated Funds; Broader Public Sector Procurement Directive and Implementation
Revision Date:	September 2007, October 2019
Review Date:	October 2022
Responsibility:	Superintendent of Business Services and Treasurer

INTENDED PURPOSE:

The purpose of this Administrative Procedure is to provide a standard process for the handling of surplus, and the disposal of obsolete assets, equipment and fixtures within the Halton District School Board (HDSB).

DEFINITIONS

Asset: A physical item that the HDSB has acquired or purchased.

Equipment: Anything kept, furnished, or provided for a specific purpose.

Fixture: A piece of equipment or furniture which is fixed in position in a building.

Obsolete: Any asset, equipment or fixture that is no longer useful, because it is damaged, broken, unsafe to use, prohibitive to repair, out of date, or no longer needed because of changing technology or a change in the delivery of programs:

Surplus: Any Asset, Equipment or Fixture that has not been used or is no longer needed at a HDSB school, department or HDSB location.

Public Auction: An auction that gives prospective buyers a description of the property to be auctioned off or sold.

GENERAL

All assets, equipment and fixtures contained within a school/department or HDSB location as well as assets, equipment and fixtures purchased through HDSB budgets, school generated funds and/or donations remain the exclusive property of the HDSB. These items shall not be disposed of or sold by an employee without the permission of the Manager of Purchasing (or designate). This procedure does not apply to the disposal of office and school supplies, consumables, library books, textbooks or other learning materials. These materials can be disposed of at the school level as needed on an ongoing basis. In addition, this procedure does not apply to the handling of or disposal of electronic waste (e-waste). E-Waste is handled through the Information Services Department.

The intent of this procedure is to obtain maximum utilization or recovery of funds when assets, equipment or fixtures are no longer required for their original purpose. The disposal method chosen, should be the one that results in the best overall benefit to the HDSB and has minimum impact on the environment. Surplus equipment or fixtures from HDSB facilities that are scheduled for closure will be coordinated and managed through the School Operations Department, in consultation with the schools Superintendent.

PROCEDURES

School/department or Administrative staff are not permitted to dispose of HDSB property, unless authorized in accordance with this Administrative Procedure. The school principal, department manager (or designate) is responsible for identifying surplus, obsolete assets, equipment or fixtures, as outlined in this administrative procedure.

Declaration of Surplus

Schools/departments that have surplus assets, equipment or fixtures are to;

First -- offer the surplus to other HDSB schools/departments, directly, through the use of the HDSB Facility Services Staff Talk conference.

Second -- if the surplus item is not needed by other HDSB schools/departments, the school/department can provide the Purchasing Department with an inventory list of the surplus items (*forms available from myhdsb.ca*). Purchasing staff may communicate the availability of surplus furniture, equipment and fixtures through the surplus section of the Purchasing Department web page on myHDSB, or by an alternate means to other public agencies.

HDSB surplus assets may be used to fill a need elsewhere within HDSB, as long as it is not cost prohibitive to relocate them and they are suitable for re-use and re-distribution. Surplus not requested by/or moved to another HDSB facility within ten (10) business days, is to be reported to the Purchasing Department, to be disposed of in the most appropriate manner.

Request for Surplus

Surplus equipment or fixtures from HDSB facilities that are scheduled for closure will be coordinated and managed through the School Programs Department, in consultation with the school's Superintendent.

School Principals / Department Managers may request surplus from other locations, or by submitting a request through the Purchasing Department. Surplus requested to be utilized at a different HDSB location, is to be relocated in the most cost effective manner possible, within five (5) business days of the request, or sooner if feasible. All costs associated with surplus movement is the responsibility of the receiving location.

A work order issued through the Facilities Department may be required to disconnect large equipment/fixtures, prior to being relocated, as well as when installing within the receiving HDSB location. All work orders will be coordinated and approved through the Facilities Department to ensure infrastructure (electrical, plumbing, ventilation, etc.) and asbestos requirements are documented and properly addressed.

Removal and Disposal of Obsolete Assets

Surplus assets, equipment or fixtures that are not requested or needed by other schools/departments within ten (10) business days, will be deemed obsolete, and the originator is to contact the Purchasing Department. Obsolete assets requiring storage before disposal shall be arranged through the Purchasing Department. The Manager of Purchasing (or designate), in collaboration with the originating location Principal or Manager will proceed with disposing of the obsolete assets, equipment or fixtures. All material that is to be disposed is to be categorized and an inventory list is to be created by the originating location (forms available on myhdsb.ca). This list is to be forwarded to the Manager of Purchasing. The method of disposal used for a particular asset should be that, which results in the best overall benefit to the HDSB. Approved methods of disposal include (but are not limited to):

- Scrap, dismantle, recycle, refurbish, recondition, rebuild
- Donate to a non-profit organization or relief fund at no cost to HDSB
- Return to the supplier for trade-in or credit
- Sell by public quotation to the highest bidder
- Sell by cooperative public auction with other public agencies
- Utilize services of a third party, to purchase or dispose when appropriate.

Sale of Surplus and Obsolete Assets

All surplus/obsolete assets that are no longer needed or useful within the HDSB, but the assets are in saleable condition, shall be put out to bid or public auction. The Purchasing Department shall manage the sale of such items. Items sold through this process will require the completion of a Bill of Sale (*forms available on myhdsb.ca*) which intends to limit the HDSB liability to third parties.

Completed Bill of Sale forms are to be retained by the Purchasing Department. All payments for the purchase will be made payable to HDSB and submitted to the Manager of Purchasing (for audit purposes) along with the Bill of Sale documents.

Revenue from sales shall be processed and deposited through the HDSB Finance Department.