



Purchasing Policy

The East Greenbush Community Library establishes this purchasing policy to guide the purchase of goods and services and to comply with the General Municipal Law Section 104-b of the State of New York, generally accepting auditing standards, and the principles of responsible fiscal management.

General

- Only the Library Director, members of the Library's management staff (Department Heads), or another person designated by the Board of Trustees, may commit the Library to make purchases. Further, with the few exceptions described herein and those purchases requiring action to secure the immediate safety of employees or the public, all purchases require advanced planning and the adherence to the processes outlined in this policy. It is the responsibility of each department head to secure the appropriate bids or to investigate alternative supplies to ensure the most economical purchase of required items. The Library Director or designee shall have the final authority on all purchasing decisions. All purchases will have a budgetary appropriation.
- Materials, equipment, supplies, and services purchased by the Library shall be of a quality and quantity required to serve the functions of the Library in a satisfactory manner.
- Whenever possible and advantageous, purchasing should be done through State Contracts published by the New York State Comptroller's Office. Every effort will be made to obtain the lowest cost for materials and services purchased by the Library. Purchases that can be made using New York State approved contract pricing and/or discount programs constitute an exception to local competitive bidding requirements and do not require additional quotes or bids. In the event that pricing and/or discount program can be found that result in greater cost savings to the Library than a comparable State contract, that pricing and/or discount program may be used.
- In certain situations, solicitation of alternative proposals or quotes is not practical. These may include: emergencies, true leases and sole source situation and combinations of professional services/purchases. In each of these cases, the requesting department and Library Director shall analyze, justify, and clearly document the reasons behind the award. No awards shall be made without the Library Director's approval. The Board authorizes the Library Director (or designee) to purchase without bidding or securing alternative proposals or quotations where time is a crucial factor.

Requirements for Obtaining Quotes and Bids

With the understanding that purchases for library materials are often available through statewide or national discount programs for libraries, the Board of Trustees establishes the following policy related to purchasing:

- **Library Materials:** Books, magazines, A/V, and other such materials intended for patron use are generally purchased from vendors offering volume discounts or vendors offering a State contract discount program. Materials available only from the publisher are generally purchased with little or no discount.
- **Capital and One-Time Purchase(s):** The following schedule is related to capital or one-time purchases of non-library materials (i.e., equipment, furniture, etc.) where individual items are at the stated prices and for which there are sufficient budget appropriations. Department Heads and all involved in the purchase process shall be aware of prevailing state contracts or other previously arranged discount programs that the library is eligible to participate in. The Library will comply with all New York State requirements for public works projects. The Office of the State Comptroller publishes guidelines to assist local governments with the procurement process.



Purchase Amount	Requirement
Less than \$1,000	Discretion of Library Director, Department Head
\$1,000-\$2,999	Documented Verbal or written quotes, from at least two (2) separate vendors (if available). Approved by Library Director
\$3,000-\$9,999	Formal Written Quotes, from at least three (3) separate vendors (if available). Approved by Library Director
\$10,000-\$19,000	Formal Written Quotes, from at least three (3) separate vendors (if available). Approved by Library Board.
\$20,000 and above- Purchase Contracts	Subject to Competitive Bidding, Approved by Library Board Advertised bid process required by General Municipal Law for purchases of materials, equipment, or supplies in excess of \$20,000
\$35,000 and above- Contracts for Public Work	Subject to Competitive Bidding, Approved by Library Board Advertised bid process required by General Municipal Law for public work contracts in excess of \$35,000.
Sole Source Purchase	Two (2) Verbal or Written Quotes, Approved by Library Director

Claims

- All invoices and pre-payments shall be paid in accordance with procedures established by the Library.

Ongoing Expenditures and Professional Service Contracts

- The Library will conduct a review of all maintenance contracts and ongoing expenditures every one to three years. The schedule above applies.

Competitive Bidding

- Formal bids, competitive bidding, and advertised bids are all terms that can be used to describe the competitive bidding process, which is designed to clearly identify products and/or services so that potential vendors can review those requests and submit competitive, sealed, bids for them. The process should be designed to be fair



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and open, and requires the library to select lowest responsive, responsible bidder after advertisement for sealed bids. Circumstances under which the contract may not be awarded to the lowest responsive, responsible bidder may include but are not limited to: (1) vendor cannot guarantee delivery of goods or services within the time frame or under the condition established by the library; (2) vendor's terms of payment are disadvantageous to the library; (3) vendor cannot comply with the full specifications set forth in the bid; and (4) vendor's after purchase support services are deemed inadequate. Notwithstanding this provision, the Board may choose to reject any bid for reason.

- A Request for Proposals (RFP) is generally used for the procurement of services or technology in situations where price is not the sole determining factor, and the award will be based on a combination of cost and technical factors (Best Value). Through its proposal, the proposer offers a solution to the objectives, problem, or need specified in the RFP, and defines how they intend to meet (or exceed) the RFP requirements. The Library may conduct a Request for Proposal (RFP) to secure any professional services, however, the Board retains discretion to decide if the use of RFPs for professional services is in the best interest of the organization. It is recommended that the Library use an RFP for services \$20,000 or more.

Unintentional Failure to Comply

- The unintentional failure to comply with the provisions of General Municipal Law, section 104-b shall not be grounds to void action taken or give rise to a cause of action against the East Greenbush Community Library or any officer or employee thereof.

Approved, April 16, 2012

Draft Revisions presented to Admin Committee for discussion September 16, 2022, and October 5, 2022.

Recommended by Admin Committee October 5, 2022

Amendments approved by Board of Trustees, October 18, 2022