



## Purchasing Policy

The Library is committed to purchasing materials, supplies, equipment, and services in a cost-efficient manner. Quality of the product and/or service must be balanced with careful evaluation of price quotations, competitive bids and environmental impacts. The Library complies with the New York State Competitive Bidding Law, and conforms to all applicable federal, state, and other legal requirements. Once an expenditure is determined to be a purchase or public works contract, a good faith effort will be made to determine whether it is known or can reasonably be expected, taking into account past purchases and the aggregate amount to be spent in a year that the aggregate amount spent will rise to the level of required competitive bidding.

The following items are exempt from competitive bidding pursuant to Section 103 of the General Municipal Law: purchase contracts under \$20,000.00 and public works contracts under \$35,000.00; goods purchased from agencies for the blind or severely handicapped; from correctional institutions; from disabled veterans; purchases under state, county or Town of Brookhaven contracts or Suffolk Cooperative Library System coordinated contracts.

In addition, alternative proposals or quotations will not be required under the following circumstances:

1. Professional services or services requiring special or technical skill, training or expertise. The individual or company must be chosen based on accountability, reliability, responsibility, skill, education and training, judgment, integrity, and moral worth. Among the factors to be taken into consideration are:
  - Whether the services are subject to state licensing or testing.
  - Whether substantial formal education or training is necessary to perform the service.
  - Whether the service requires a personal relationship between the individual or company and library administration.

Professional and technical services will include, but are not limited to the services of: attorneys, physicians, engineers and/or architects preparing plans, maps and estimates; insurance agents and/or brokers; printing that involves extensive writing, editing, or art work; and computer software designers or programmers of customized programs or services.

2. Emergency purchases where seeking alternate proposals may threaten life, health, safety or welfare of the staff or visitors. This does not preclude alternate proposals if time permits.
3. Purchases of surplus and/or secondhand goods. If alternate proposals are required, the Library is precluded from purchasing surplus and/or secondhand goods at auction or through specific advertised sources where the best prices are usually contained, since surplus and/or secondhand goods may indicate an older product.
4. Goods under \$1,000.00 and public works contracts under \$2,000.00.
5. Sole source suppliers, such as patented goods or services or public utility services. The unique benefits of the item to be purchased or service to be rendered should be documented, together with an assurance that there is no substantial equivalent.

Use of purchase orders below \$250, is optional for circumstances where deemed advisable.

Although not required, competitive bidding of purchase contracts under \$20,000.00 or public works projects under \$35,000.00 may be solicited if so desired.

The decision that a purchase is not subject to competitive bidding will be documented in writing. This document may include written or verbal quotes from vendors, a memo indicating how this decision was made, a copy of the contract indicating the source that makes the item or service exempt, a memo detailing the circumstances which led to an emergency purchase, or any other written documentation that is deemed appropriate.

For purchasing and public works contracts that fall below or outside of legal competitive bidding thresholds, the Library has in place a fair and equitable purchasing system, as outlined below, that serves to safeguard Library interests and funds.

- 1) Written requests for proposals (RFP), written quotations, and/or verbal quotations will be executed as purchase orders and/or contracts to exercise control over expenditures, secure the lowest price, and assure that favoritism will be avoided.

The following procedure will be used as required by this policy in order to achieve the best purchase price:

<u>Frequency</u>	<u>Spending Range</u>	<u>Requirements</u>
One-time	\$1,000. - \$4,999.	One additional quote
One-time	\$5,000. - \$20,000.	Two additional quotes, at least one in writing
Annual aggregate	\$5,000. - \$9,999	One additional quote
Annual aggregate	\$10,000.- \$20,000.	Two additional quotes

Under ordinary circumstances, contracts shall be awarded to the lowest responsible bidder. The library reserves the right to determine whether or not a bidder is deemed "responsible." This decision must be documented and filed with the records supporting the purchase. Circumstances where a contract may not be awarded to the lowest responsible bidder may include, but are not limited to, the following:

- The vendor cannot guarantee delivery of goods or services within the time period or under the conditions prescribed.
  - The vendor's terms of payment are disadvantageous or unacceptable.
  - The vendor's warranty for materials and services is deemed inadequate.
  - The vendor's after-purchase support services are deemed inadequate.
  - Any other circumstance in which the vendor will not or cannot fully comply with all specifications as set forth.
- 2) No purchase of goods or services will be made from a vendor in which a Trustee, Administrator, Staff Member, or immediate family member of a Trustee, Administrator or Staff Member holds a full or partial interest.
  - 3) The Director may approve purchases and/or written contracts up to \$10,000.00. A purchase or contract that exceeds \$10,000.00 must be presented to the Library Board of Trustees for their approval at an open meeting.

- 4) Even if it is to the Library's benefit to add to or upgrade an existing system or equipment by using the same vendor who supplied the original or existing system or equipment, the Director must receive prior Board approval if the purchase will exceed the competitive bidding threshold.
- 5) In the case of a serious emergency that threatens safety or the ability of the Library to stay open to the public, and calling an emergency meeting of the Library Board of Trustees is not practical, the Director is authorized to take necessary action, the cost of which shall not exceed \$50,000.00. This emergency authorization must be reported at the next regular meeting of the Library Board of Trustees.

The Library Director shall establish procedures for approval of purchases consistent with this policy. The Library Director, or appointed designee, is responsible for the signing and maintenance of purchase orders and contracts.

All Library checks of \$2,500.00 or more, with the exception of payroll, must bear the actual or facsimile signature of at least two authorized signers. Any of the following persons may be one of the two authorized signers: Library Treasurer, Library Director, up to 2 named members of the Library Board of Trustees. The named Trustees will be identified and approved each year at the July organizational meeting of the Library Board of Trustees.

In order to avoid late payment penalties, a list of vendors who may be paid in advance of the monthly Library Board meeting will be presented to the Library Board for their approval at the July organizational meeting.

A member of the Library Board will review and approve all invoices prior to the Library Board meeting.

### Green Purchasing

As part of the Sustainable Libraries Initiative, the library will also consider environmental factors to our price and performance criteria when making purchasing decisions. Green purchasing attempts to identify and reduce environmental impact and maximize resource efficiency, keeping the triple bottom line of environmental soundness, economic feasibility and social equitability in mind.

### GUIDING PRINCIPLES

- Purchase supplies only as needed, try to combine orders whenever possible.
- Purchase sustainably-produced, recyclable and biodegradable products whenever possible.
- Consider the toxicity of products and purchase the least toxic products that will work.
- Consider products that are sourced locally and use local businesses whenever possible.