

East Greenbush Community Library

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POLICY NAME	Purchasing Policy			POLICY NO.	
EFFECTIVE DATE	4/16/2012	DATE OF LAST REVISION	4/16/2012	VERSION NO.	1
APPLIES TO Apply group names to define applicable areas of staff.					
Staff	x	Patrons		Board	x

VERSION HISTORY				
VERSION	APPROVED BY	REVISION DATE	DESCRIPTION OF CHANGE	AUTHOR
1	Board	4/16/2012	Adoption	Michael Poost

Policy

The East Greenbush Community Library establishes this purchasing policy in order to comply with the General Municipal Law of the State of New York, generally accepted auditing standards, and the principles of responsible fiscal management.

General

1. Only the Executive Director, members of the Library's management staff (administration and department supervisors), 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.
2. 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.
3. It is the responsibility of each supervisor, supported by the Library administration, to secure the required quotes or bids, or to investigate alternative suppliers to ensure the most economical purchase of required items. The process of securing quotes and/or bids is further described in this policy. The Executive Director shall have the final authority on all purchase decisions.
4. 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.

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 bids:

1. 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.
2. Capital and One-Time Purchases: 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. Supervisors 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.

Purchase Amount	Requirement
Up to \$999	Discretion of the Director
\$1,000-\$4,999	Minimum of three, documented oral quotes
\$5,000-\$9,999	Minimum of three written quotes
\$10,000 and above	Formal bid process approved by the Board of Trustees

The Library will comply with all New York State requirements for public works projects.

Claims

All invoices and pre-payments shall be paid in accordance with procedures established by the Board of Trustees

Ongoing Expenditures and Professional Service Contracts

The Library will conduct a review at minimum yearly, maximum every three years of all maintenance contracts and ongoing expenditures. The schedule above applies.

Request for Proposals (RFP)

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 it intends to meet (or exceed) the RFP requirements. The Library will conduct a formal Request for Proposal (RFP) process to secure any professional services expected to cost \$20,000 or more.