Grinnell Public Library District

Purchasing Policy:

Purpose
In order to comply with New York State General Municipal Law governing the purchase or lease of products and services, to provide a system for their competitive procurement in accordance with generally accepted auditing standards, and to assure the prudent and economical use of public moneys, the Board of Trustees of Grinnell Public Library District (GPLD) has adopted the following policies and procedures.

Protocols
Unless otherwise provided for in this policy, the Library Director, or designee, shall have the authority to purchase or lease products or services provided that the amount budgeted for any expense line of the annual budget shall not be exceeded. Purchases above an established dollar amount threshold or purchases for which there are not sufficient budgetary appropriations shall require prior approval by either the Board President or the Finance Committee and shall be reported to the Board of Trustees. The Board of Trustees, by formal resolution, shall authorize the funds for these purchases through an appropriate transfer of funds between budget line items, from the capital reserve fund to the operating budget, or through a bank loan, or through a bond issue.
Further, with the few exceptions described below and those purchases that require immediate action in order to secure the safety of the staff and public, all purchases require advanced planning and the proper preparation of a purchase order.
The Library shall act to procure products and services at the lowest possible cost, consistent with its needs and with regard to durability, performance, quantity, delivery, and service.
The Library Director, or designee, shall have the authority to pay all claims made for purchases and shall provide a written report of such activity to the Board of Trustees on a monthly basis.

Bidding Procedures
With the understanding that purchases of library materials are often available through statewide or national discount programs for libraries, the Board of Trustees establishes the following policy related to bids.
- **Library Materials:** Books, magazines, audiovisual materials, online databases, and other such materials intended for patron use are generally purchased from vendors offering volume discounts or vendors offering a state contract. Materials available only from the publisher are generally purchased with little or no discount. Purchases of library materials generally are not subject to competitive bidding regulations.
- **Other Purchases:** The following schedule is for purchases involving the acquisition of materials, supplies, or equipment for which there are stated prices and sufficient budget appropriations. Catalogs or price lists may be substituted for verbal, telephone, or written quotes. If the item is offered under state contract and the price is equal to or less than the state contract price, then no quotes are required.
    - *No Quotations*: Materials and services where the aggregate amount involved in any one transaction does not exceed $2,500. The Library Director may approve these purchases without securing competitive quotations and bids if the price quote is

considered to be reasonable and terms and delivery dates meet the needs of the Library.

•*Telephone Quotations:* Materials and services that range in price from $2,501 to $5,000 require verbal competitive bidding. The bids may be obtained through telephone quotations. A minimum of three (3) documented quotes must be attached to the purchase order.

•*Written Quotations*: Materials and services that range in price from $5,001 to $20,000, and contracts for public works that are less than or equal to $35,000, require written competitive bidding. A minimum of three (3) written quotes on business stationery must be attached to the purchase order.

- **Formal Bid Process:** All contracts for public works (for example, construction) in excess of $35,000 and purchase contracts (for example, equipment) in excess of $20,000 must be awarded, after advertising for sealed bids, to the lowest responsible bidder who furnishes the required security.

Exceptions to the Competitive Bid Process

Emergency: emergencies arising from an accident or other unforeseen occurrence, or situations in which public buildings, property, or occupants are at risk, or situations which require immediate action that cannot await competitive bidding.

Sole source: goods or services for which there is no substantial equivalent or which are provided by only one source.

Professional services: services which involve specialized expertise or knowledge such as architects, engineers, land surveyors, attorneys, insurance brokers.

Government contracts: state contracts which are regulated by the Office of General Services.

"Piggybacking": may purchase goods or contract for services through a political sub-division (for example, the county) if available from, and permitted by, that political sub-division.

Method of Determining Whether Procurement is Subject to Competitive Bidding

The Board of Trustees with the Director will determine if the proposed procurement is a purchase contract or a contract for public work. If the procurement is either a purchase contract or a contract for public work, then the Board of Trustees with the Director will determine whether the amount of the annual procurement is above the applicable monetary threshold as set forth above.

The Board of Trustees with the Director will also determine whether any applicable exceptions to the competitive bidding requirements exist.

Contract Combining Professional Services and Purchase

In the event that a contract combines the provision of professional services and a purchase, the Board of Trustees with the Director, in determining the appropriate monetary threshold criteria to apply to the contract, will determine whether the professional service or the purchase is the predominant part of the transaction.

Adopted by the Grinnell Public Library Board of Trustees on April 21, 2021.