



## **Purchasing and Procurement Policy**

### **Purpose**

The Board of Trustees of the Boyertown Community Library has established this purchasing policy to govern the purchase of goods and services for the Library. The Library will make purchases that provide the greatest economic advantage. First consideration will be given to vendors within the library district who offer competitive pricing and acceptable quality and service.

### **Purchasing Agent**

The Library Director shall be the chief purchasing agent of the Library. The Library Director is responsible for the library- wide purchasing function and shall have the authority to delegate powers to staff for purchasing items when necessary. The Youth Service Coordinator has the authority to make purchases for youth programming and a portion of the summer reading budget. Any authorized persons are required to coordinate their purchasing with the Library Director.

### **Purchasing Guidelines**

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:

### **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 contract discount program. The director may redirect expenditures between the collection spending categories or to new categories within the established collection budget for collection expenses up to \$5000 without prior consultation with the board.

The budget shall contain, where feasible, line item descriptions in subsidiary worksheets for recurring subscriptions and memberships that exceed \$100 or other dollar level as recommended by the treasurer.

### **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.

The Director may expend up to \$1000 for goods/services that have not been budgeted as a line item expenditure for the good of the library with all appropriate receipt documentation. The bookkeeper will maintain a journal of these purchases for board review.

Expenditures of less than \$5000 will generally be expensed in the year of expense. Acquisitions of property and equipment and all expenditures for repairs, maintenance, renewals, and betterments over \$5000 that materially prolong the useful lives of assets are capitalized. Expenditures for repairs and maintenance are expensed when paid.

All public work contracts in excess of \$35,000 and all purchase contracts in excess of \$10,000 shall be subject to competitive bidding. All purchases between \$1,000.00 and \$9,999.00 must have full board approval.

Under normal circumstances, contracts shall be awarded based on board examination and approval, and will be awarded based on how they meet the needs of the library and their project. For all materials and services not subject to competitive bidding, the library will solicit at least three competitive quotations for public works and purchase contracts. Such price quotes will be either written or verbal based on the following criteria:

The Library Director shall compare prices from as many responsible suppliers of the goods or services required as is practical, and shall purchase from that supplier where total costs are lowest, when quality and timeliness of delivery are comparable. Preference will be given to purchasing from local businesses when total cost, quality and timeliness of delivery are comparable.

The Director is authorized to establish charge accounts with businesses from which the Library will make purchases on a continuing basis. The Director may assign other employees responsibility for purchasing supplies needed for specific library programming.

The Director is authorized to establish and maintain a credit card for making library purchases when more traditional methods of payment are impossible or not timely or practical in the circumstances. Major library vendors that are supplying computer hardware and software, books, audio-visual materials, and periodicals subscription vendors are exempt from the restrictions of this policy

Price should be one of the factors in the evaluation of responses. However, the Library is not required to take the lowest price. Awards shall be made to the bidder whose bid is responsive to the solicitation and is most advantageous to the Library. (Price, quality, availability, etc.).

If the Library Director expects a purchase of non-emergent goods/services to exceed \$7500 then 3 or more competitive bids will be required.

**When Competitive Bidding is not required:**

- a. Where the goods or services to be procured are economically procurable from only one source
- b. Where the services required are for professional skills. Professional services such as an auditor, attorney, architect or engineer, which involve specialized expertise, use of professional judgment, and/or a high degree of creativity.
- c. In emergencies involving public health, public safety, or where immediate expenditure is necessary
- d. Contracts for the maintenance or servicing of equipment which are made with the manufacturers or authorized service agents of that equipment
- e. Where the goods or services are procured from another governmental agency or through a library cooperative program in which prices have been previously determined by competitive bidding
- f. Purchases and contracts for the use, purchase, or installation of proprietary software
- g. Contracts which by their nature are not adapted to award by competitive bidding, contracts for utility services such as water, light, or heat.

**Emergency Purchases:**

An emergency is defined as an unforeseen combination of circumstances or the resulting state that calls for immediate action where the failure to do so would be a detriment to the safety of the library, its employees and patrons. If a situation impinges on Library services or facilities and an emergency purchase contravening the policy statements above is deemed necessary, the Library Director and/or his/her designee, may authorize up to \$5000 for the purpose of addressing an emergency purchase of goods or services without prior board action.

Established procedures will be followed as much as is practicable under the circumstances. A written justification of the nature of the emergency and the selection of the particular vendor shall be submitted to the Library Board and shall become part of the record for the purchase.

The Procurement Policy shall be reviewed every three years by the Board of Trustees.

Approved by the BCL Board of Trustees on May 25, 2021