

Sandwich Public Library District

Purchasing Policy
Approved April 8, 2014



PURCHASING POLICY (Bids/Quotations)

- I. Purchases of the District are governed by the State of Illinois statutes. It is the policy of the Library Board of Trustees to use, in addition to any statutory requirements, the most responsible business practices in its purchases. It is the policy that all purchases, contracts and expenditure of funds shall be awarded to the lowest responsible bidder considering conformity with specifications, terms of delivery, quality and serviceability. However, bidding is not required in the following cases:
 - 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;
 - 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;
 - F. Purchases and contracts for the use, purchase or installation of data processing equipment or software;
 - G. Contracts which by their nature are not adapted to award by competitive bidding, such as contracts for printing, tax anticipation warrants and other evidences of indebtedness, and contracts for utility services such as water, light, heat or telephone;
 - H. Purchases as identified by this policy of less than \$20,000.

The staff, as required by board directive, shall seek bids (or quotations if bids are not specifically required) from the widest possible array of contractors, and suppliers that time permits. This practice will produce the most competitive offers and terms available from the widest number of interested firms or individuals.

- II. The district will utilize a system of solicitation lists of the names, addresses and phone numbers of the firms or individuals who have expressed an interest in being notified as to particular types of contracts, equipment, supplies or materials which the District seeks to purchase. The staff will add to each list of those expressing an interest, any firm or individual doing business which the staff determines should be added to such list. The staff may remove a firm or individual from a list for cause, with Board approval, or the firm or individual may request its removal.

The firms or individuals on any such lists will be solicited directly by the staff to bid or quote on appropriate purchases, in addition to the requirements of advertising or other public notification mandated. The District shall, when advisable, publicize its system of lists so that any interested person or firm can ask to be added to the appropriate listing.

The inclusion of a firm or individual on a solicitation list shall not constitute any prequalification for bidding or release in any fashion the firm or individual from meeting any and all requirements set out in a particular contract, bid, quotation or proposal. This system of solicitation lists is solely for purposes of supplementing the advertisement or notification requirements otherwise used, in order to avoid even the appearance of favoritism or lack of fair competition in the District's purchases.

- III. No commitment for expenditures of District monies, except from the petty cash fund, shall be made without authorization issued according to the following conditions:

A. \$20,000 or More

All expenditures of \$20,000 or more shall be made only with prior Board approval in the manner prescribed by State law and Board rules and regulations. Advertisements for sealed bids or requests for proposals will be properly handled through the public media. Sealed bids, based on authorized specifications, or requests for proposals shall be received at a public bid opening and include all costs for labor and materials, Bid Bond, Performance Bond and Certificate of Insurance. Bids will then be tabulated and submitted to the Board along with staff's recommendation for action. Formal contracts with appropriate signatures for both Board and Contractor are required.

B. Less than \$20,000 - More Than \$2,500

All expenditures of less than \$20,000, but more than \$2,500, shall be made only with prior Board approval. Staff shall obtain at least three (3) formal written quotations with the Contractor's signature applied and Performance

Bond to be submitted to the Board. Administrative staff will also submit a recommendation for Board action.

C. Less than \$2,500 - More Than \$1

Expenditures of less than \$250, but more than \$1, for either approved budget line items or budget contingency items can be made at the discretion of the Library Director without bids or quotations.

D. Emergency Expenditures

- 1) Emergency expenditures over \$500 can only be made with the written approval of the Library Director and Board President and approved by three-fourths (3/4) majority of the members of the Board. The initial Board inquiry may be by phone, which is then to be ratified at the next Board meeting.
- 2) Emergency expenditures under \$500 can only be made with the written approval of the Library Director and Board President. No Board poll is required but the emergency purchase should be reported at the next meeting of the Board.

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Administrative Purchasing Procedure

IN REF: Purchasing Policy (Bids/Quotations)

SUBJECT: BID OPENING PROCEDURE

- 1) The author or designer of the bid package shall provide appropriate tabulation forms.
- 2) At the appointed hour, the architect or the District's representative shall declare the bidding closed and determine the following:
 - A) Were all addenda, if required by the bid specifications, received? (List addenda by number and identify)
 - B) Does anyone present desire any clarification of plans, specifications or bid documents?
 - C) Was anyone denied the right to bid?
 - D) Are there any objections to proceeding with opening of bids?
- 3) Should there be cause, the bidder may at this point change or withdraw his/her bid. In the event of objection to opening of bids, the District's representative will note the name of the objector(s) and the reason for objection. The matter will then be referred to the District legal counsel who will decide on procedure as follows:
 - A) Attempt to satisfy the objection.
 - B) Secure complete information as to objection and proceed with opening the bids under protest, for later disposition by proper authority.
 - C) Postpone the bid opening to a later date to allow sufficient time for the objection to be justified.
 - D) Rule the objection as informal and proceed with opening of bids.
- 4) The bids shall be read aloud to the assembled group in the following order:
 - A) name of bidder;

- B) license number of bidder, if required;
- C) bid security and amount if certified check;
- D) Fair Employment Compliance, if required;
- E) base bid;
- F) alternate bid, if any;
- G) unit price (only if they may influence determination of low bidder, or if requested);
- H) completion (or delivery) date;
- I) any other pertinent information.

- 5) Upon conclusion of opening and recording bids, thank all participants.
- 6) State apparent low bidder, subject to review and analysis by staff.
- 7) Give date staff recommendation will be made to the Library District Board of Trustees.
- 8) Remember, only the Board can reject, waive technicalities, or award bid. Staff only recommends!