

The following sets forth the procedures for the procurement of goods and services by the Burnt Hills-Ballston Lake Central School District. All claims associated with the procurement of goods and services shall be properly confirmed, verified and approved before payment with the exception of ones allowed under statutory law which are making payments for public utility services (including gas, electric, water, sewer and telephone services), postage and freight, and express charges prior to claims audits.

I. Quotes When Competitive Bidding Not Required

Goods and services which are not required by law to be procured by the District through competitive bidding will be procured in a manner so as to ensure the prudent and economical use of public monies in the best interests of the taxpayers. Alternative proposals or quotations will be secured by requests for proposals, written or verbal quotations or any other appropriate method of procurement, as set forth below.

A. Methods of Documentation

1. Verbal Quotations: the telephone log or other record will set forth, at a minimum, the date, item or service desired, price quoted, name of vendor, name of vendor's representative.
2. Written Quotations: vendors will provide, at a minimum, the date, description of the item or details of service to be provided, price quoted, name of contact. For example, with regard to insurance, the District will maintain documentation that will include bid advertisements, specifications and the awarding resolution. Alternatively, written or verbal quotation forms will serve as documentation if formal bidding is not required. "Requests for Proposals" (RFPs), documented in the same manner as described herein, may also be used.
3. Requests for Proposals: For professional contracts over \$35,000 the District will contact a number of professionals (engineers, architects and accounts) and request that they submit written proposals. The RFPs may include negotiations on a fair and equal basis. The RFPs and evaluation of such proposals will consider price plus other factors such as:
 - a. the special knowledge or expertise of the professional or consultant service;
 - b. the quality of the service to be provided;
 - c. the staffing of the service; and
 - d. the suitability for the District's needs.

The District may first locate prospective qualified firms by:

- a. advertising in trade journals;
- b. checking listings of professionals;
- c. making inquiries of other districts or other appropriate sources.
- d. other methods determined to be acceptable by the Assistant Superintendent for Support Services.

The District will then prepare a well-planned RFP which will contain critical details of the engagement, including the methods which it will use in selecting the service.

B. Purchases/Public Work: Methods of competition to be used for non-bid procurements, documentation to be maintained.

The District will require the following methods of competition be used and sources of documentation maintained when soliciting non-bid procurements in the most cost-effective manner possible:

1. Purchase Contracts up to \$20,000
Under \$2,500; One verbal quote
\$2,500 - \$5,000; Two written quotes
\$5,000 - \$20,000; Three written quotes
2. Public Work Contracts up to \$35,000
Under \$2,500; One verbal quote
\$2,500 - \$5,000; Two written quotes
\$5,000 - \$35,000; Three written quotes
3. Emergencies: Verbal quotes
Documentation will include notations of verbal quotes.
4. Leases of Personal Property: Written quotes
Documentation will include written quotes, cost-benefit analysis of leasing versus purchasing, etc. The District will note that the contract is a true lease and not an installment purchase contract.

II. Quotes Not Required When Competitive Bidding Not Required

The District will not be required to secure alternative proposals or quotations for those procurements:

1. under a County contract;
2. under a BOCES contract;
3. under a State contract;
4. under an approved national contract;
5. of articles manufactured in State correctional institutions; or
6. from agencies for the blind and severely disabled.

In addition, the District will not be required to secure such alternative proposals or quotations for:

1. emergencies where time is a crucial factor;
2. procurements for which there is no possibility of competition (sole source items);
3. procurements of professional services, which, because of the confidential nature of the services, do not lend themselves to procurement through solicitation;
4. very small procurements when solicitations of competition would not be cost-effective; or
5. other rare and unusual circumstances with the express prior approval of the Assistant Superintendent for Support Services.

Adopted October 2016
Revised August 2017
Revised January 2018