

[HISTORY: Adopted by the Town Board of the Town of Copake 2-13-1992. Amendments noted where applicable.]

GENERAL REFERENCES

Investment policy — See Ch. [31](#).

§ 51-1 Policy adopted.

The Town of Copake does hereby adopt the following procurement policies and procedures.

§ 51-2 Evaluation of purchases.

Every prospective purchase of goods or services shall first be evaluated to determine the applicability of § 103 of the General Municipal Law. Every town officer, board, department head or other personnel with the requisite purchasing authority (hereinafter referred to as the "purchaser") shall estimate the cumulative amount of the items of supply or equipment needed in any given fiscal year. That estimate shall include the canvass of other town departments and past history to determine the likely yearly value of the commodity to be acquired. The information gathered and conclusions reached shall be documented and kept with the file or other documentation supporting the purchase activity.

§ 51-3 Purchases requiring bids.

All purchases of supplies or equipment which will exceed \$10,000 in the fiscal year or public works contracts over \$20,000 shall be formally bid in accordance with the provisions of § 103 of the General Municipal Law.

§ 51-4 Method for securing goods and services.

A.

All estimated purchases as follows shall require the following action:

(1)

Less than \$10,000 but greater than \$3,000 shall require a written request for a proposal (RFP) and written/fax quotes from three vendors.

(2)

Less than \$3,000 but greater than \$1,000 shall require an oral request for the goods and oral/fax quotes from two vendors.

(3)

Less than \$1,000 shall be left to the discretion of the purchaser.

B.

All estimated public works contracts as follows shall require the following action:

(1)

Less than \$20,000 but greater than \$10,000 shall require a written request for a proposal and a written/fax proposal from three contractors.

(2)

Less than \$10,000 but greater than \$3,000 shall require a written request for proposals and written/fax proposals from two contractors.

(3)

Less than \$3,000 shall be left to the discretion of the purchaser.

C.

Any written request for a proposal shall describe the desired goods, quantity and the particulars of delivery. The purchaser shall compile a list of all vendors from whom written/fax/oral quotes have been requested and the written/fax/oral quotes offered. All information gathered in complying with the procedures of this section shall be preserved and filed with the documentation supporting the subsequent purchaser or public works contract.

§ 51-5 Awarding contract.

The lowest responsible proposal or quote shall be awarded the purchase or public works contract unless the purchaser prepares a written justification providing reasons why it is in the best interest of the town and its taxpayers to make an award to other than the low bidder. If a bidder is not deemed responsible, facts supporting that judgment shall also be documented and filed with the record supporting the procurement.

§ 51-6 Obtaining required number of proposals.

A good-faith effort shall be made to obtain the required number of proposals or quotations. If the purchaser is unable to obtain the required number of proposals or quotations, the purchaser shall document the attempt made at obtaining the proposals. In no event shall the inability to obtain the proposals or quotes be a bar to the procurement.

§ 51-7 Exceptions.

Except when directed by the Town Board, no solicitation of written proposals or quotations shall be required under the following circumstances:

A.

Acquisition of professional services.

B.

Emergencies.

C.

Sole source situations.

D.

Goods purchased from agencies for the blind or severely handicapped.

E.

Goods purchased from correctional facilities.

F.

Goods purchased from another governmental agency.

G.

Goods purchased at auction.

§ 51-8 Annual review.

This policy shall be reviewed annually by the Town Board at its organizational meeting or as soon thereafter as is reasonably practicable.