Aurora Free Library

Purchasing/Procurement/Reimbursements Policy

Purpose

The purpose of this policy is to establish guidelines for the Aurora Free Library for the procurement of goods and services in a manner that ensures efficiency, transparency, and fiscal responsibility while complying with applicable New York State laws.

Article 1 – General Guidelines

Ethical Standards

1.1 All purchases shall be made in the best interest of the Library.

1.2 Library staff and trustees involved in procurement shall adhere to ethical standards and avoid conflicts of interest.

Budget Compliance

1.3 Purchases must be within the approved annual budget unless otherwise authorized by the Board of Trustees.

Competitive Pricing

1.4 The Library will seek competitive pricing and quotes when available to ensure cost-effectiveness and fiscal responsibility.

Article 2 – Procurement Thresholds & Procedures

Purchase Amount	Required Action
Up to $2,500	Discretion of the Library Director or designee.

$2,500 – $9,999	At least two verbal or written quotes from responsible vendors, documented in library records.
$10,000+	At least two written quotes from responsible vendors, documented in library records.

• In cases where competitive quotes are not obtained, a written explanation must be provided and retained in procurement records.

Article 3 – Professional Services & Exceptions

3.1 Professional services (e.g., legal, auditing, and architectural) should be selected based on qualifications, experience, cost-effectiveness, and with the expectation of Board of Trustees approval.

3.2 Emergency Purchases: The Library Director may approve emergency purchases when immediate action is required. If the purchase exceeds $2,500, the Library Director shall immediately notify the Board of Trustees by email. The Board of Trustees will review the purchase at the next scheduled meeting.

Article 4 – Approval Authority

4.1 The Library Director is authorized to approve routine purchases within budgeted amounts, subject to the approval requirements in Section 4.2.

4.2 Purchases over $2,500 require prior approval from the Board of Trustees, unless the specific purchase or expenditure was approved in the annual budget.

4.3 The Board of Trustees must approve all new contracts and capital expenditures in excess of $2,500, regardless of whether they are included in the annual budget.

Article 5 – Purchasing Methods

5.1 Library Debit/Credit Cards: May be used for small, routine purchases following the Library Credit Card Policy.

5.2 Reimbursement: Staff should avoid using personal funds for Library purchases whenever possible. An employee who makes an approved purchase with personal funds must make all reasonable attempts to submit a reimbursement request and receipt within one month of the purchase. A purchase of up to $100 may be reimbursed without prior written authorization if the Library Director subsequently approves it; a purchase exceeding $100 requires the Library Director's prior written approval. Staff should avoid incurring sales tax whenever possible. Following the Library Director's approval, an expenditure of up to $50 may be reimbursed from the Petty Cash Fund.

Article 6 – Conflict of Interest & Vendor Relations

6.1 Trustees and staff must not have a financial interest in any Library contracts or purchases.

6.2 Staff and Trustees must not accept personal gifts or favors from vendors.

Article 7 – Record Keeping & Compliance

7.1 All procurement records will be maintained for a minimum of six years.

7.2 The Library will comply with all New York State audit and reporting requirements.

Article 8 – Policy Review & Amendments

This policy shall be reviewed annually by the Board of Trustees and updated as necessary to comply with state laws and best practices.

Adopted by the Board of Trustees on _____

This policy aligns with New York State minimum standards for public libraries, ensuring accountability, transparency, and legal compliance in procurement.