



# ADMINISTRATIVE MEMORANDUM POLICIES AND PROCEDURES

County of Jefferson Board of Legislators Office of the County Administrator

---

<b>Section:</b>	PURCHASING	<b>Issued:</b>	12/1991
<b>Subsection:</b>	4.02 Quotations	<b>Revised:</b>	6/2011, 12/2018

---

## **POLICY:**

1. Materials, supplies, equipment and services which are not subject to competitive bidding, must still be procured in a manner which will serve the best interests of the public. To this end, in cases where competitive bidding for procurement of a good or service is not legally required, purchases will be made in accordance with the following guidelines and procedures.

## **GUIDELINES:**

1. Formal competitive bidding will be utilized whenever required by law and shall be conducted in accordance with the County's Administrative Policy. When determined to be in the interest of the County the Purchasing Agent may require competitive bidding even when such bidding is not legally required.
2. Purchases may be made through available National cooperative contracts, state contracts of the NYS Office of General Services, General Services Administration, or in accordance with Sub. 3 of GML 103 which allows the purchases of materials, equipment or supplies, or the contract for services, other than services subject to Article nine of the Labor Law, through any municipality within New York State, whenever such purchases are in the best interest of the County.
3. In instances where competitive bidding is not warranted or required, or National or State cooperative contracts are not used, price quotation(s) shall be solicited and documented to achieve the best pricing.
4. A quotation shall mean a statement, written or verbal with confirmation, by a vendor setting forth the price and terms and conditions under which the vendor will furnish the goods or services.

## **PROCEDURES:**

1. The County Purchasing Agent shall be responsible for ensuring quotations are solicited in connection with the purchasing of all materials, equipment and supplies as required, including the leasing of equipment and securing of contractual agreements for services.
2. The following sets forth the quotation procedures to be utilized under the specific

acquisition thresholds:

Estimated Annual Purchase Cost  
\$0.01 - \$1,500.00  
(Materials, Equipment or Services)

Minimum Quotation Procedure to be Used  
No Quotation required. Purchase to be based upon reliable market information such as catalogues, vendor price listings or quotations.

\$1,500.01 - \$5,000.00  
(Materials, Equipment or Services)

Vendors provided with verbal description of goods services sought. Successful vendor submits written quotation confirming terms and conditions of verbal quotation.

\$5,000.01 - \$20,000.00  
(Materials and Equipment)  
Or

Minimum of three Vendors provide a written price quotation for specified goods or services sought.

\$5,000.01 - \$35,000.00  
(Public Works/Services or  
Equipment Rental exceeding \$10,000)

Minimum of three Vendors provide a written price quotation for specified goods or service.

(Equipment Rental of under \$10,000 does not require a quotation but shall be based upon availability and market pricing.)

(Expenditures for purchases of materials, supplies or equipment in excess of \$20,000 and contracts for public works in excess of \$35,000 may be purchased through a municipal, state, or national contract, or will be required to be bid in accordance with the provisions of the General Municipal Law.)

3. Where required, a minimum of three providers shall be solicited. If three providers are not solicited, or if fewer than three responses are received conditions supporting fewer solicitation shall be documented and approved by the Purchasing Agent.
4. In lieu of obtaining written quotations for purchases of commodities under \$20,000 the Purchasing Department is authorized to make such purchases using established government cooperative purchasing contracts including but not limited to the New York State Office of General Services Contracts, General Services Administration (GSA) contracts, Minnesota Multistate Contracting Alliance (MMCAP) Contracts, or municipal, State, or National Cooperative Contracts.
5. Written quotations will contain a minimum of the following information:
  - A complete description of the item, or scope of services to be accomplished
  - Special conditions; i.e. delivery, installation, trade-ins, discounts, shipping fees,

- etc.
  - Total cost
6. All quotations shall be documented and attached to the applicable purchase order and shall be maintained in the Purchasing Department records files.
  7. Quotations will serve as the basis for the selection of a supplier, and will provide the supporting documentation for purchase orders and contracts issued by the Purchasing Department.
  8. Exceptions to utilizing quotations based upon unusual circumstances such as lack of available vendors shall be approved in writing by the Purchasing Agent.
  9. If the lowest quotation is rejected, a memorandum shall be prepared by the Purchasing Department or other official involved in the contract award explaining in detail the reasons for rejection. Such a memorandum shall be filed with any contracts or purchase orders issued in connection with the procurement.
  10. This policy and procedures shall be reviewed on an annual basis by the appropriate jurisdictional committee of the Board of Legislators. The County Administrator may from time to time solicit comments from Department heads concerning this policy and procedure.
  11. Instances of failure to comply with this policy as identified by the County Auditor shall be reported to the County Administrator. The County Administrator shall keep the Chairman of the Board and the appropriate jurisdictional committee of the Board advised as to compliance with this policy and procedures. Any question as to the interpretation of this policy and procedures shall be subject to a determination of the appropriate jurisdictional committee of the Board of Legislators and, if necessary, the full Board of Legislators.

**REFERENCES:**

County Law: Sections 408-a, 362(3), 625  
General Municipal Law, Sections 103, 103-d, 104, 104b, 105, 106  
Jefferson County Board of Supervisors Resolution 353 of 1988; Resolution 339 of 1991  
Jefferson County Board of Legislators Resolutions 105 of 2011; Resolution 264 of 2018

**ISSUED:** December 19, 1991

**REVISED:** June 7, 2011, December 11, 2018

Robert F. Hagemann III  
County Administrator