



PURCHASING POLICY

Adopted 04/12/2017; Amended 11/14/2018; 10/11/2023

PURPOSE

It is the policy of the Jefferson County Library District to solicit competition when procuring goods and services. The objective of competition is to promote confidence in the integrity and cost-effectiveness of the District's procurements while maximizing economic benefits. To this end, the purchasing method for most goods and services shall be based upon a triad of cost, quality, and availability.

General

Procurement procedures of the District shall be based on guidelines provided in the Revised Code of Washington, the State Auditor's Office, and the Municipal Research Services Center (MRSC) Procurement Policy Guidelines.

This policy is organized by levels of competition in the bidding process and types of procurement.

Levels of Competitive Bidding

The following are levels of competitive bidding.

1) Minimal Competition

Some level of competition is recommended but not mandatory. Inquiries to one to three qualified vendors describing, as applicable, the required goods or services and determining pricing, schedules, and qualifications will suffice. A good faith effort shall be made to secure the best value for the District at the lowest price possible.

2) Informal Competition

The District shall prepare a written solicitation including, at a minimum, a description of the required goods or services, the project schedule or delivery date needed, a request for pricing and qualifications, and the due date for replies. Solicitation of three to five qualified vendors is recommended. If three qualified vendors cannot be reasonably identified, the District will document in writing its informal competition process for procurement and, if applicable, specifically explain why three qualified vendors were not reasonably identified.

3) Formal Competition

The District will prepare a formal solicitation such as a Request for Proposal (RFP) or Invitation to Bid (ITB), which will describe all project requirements in order for vendors to understand the District's needs and how responses will be evaluated. The RFP or ITB will be published via appropriate legal notice. Responses will be submitted via sealed bids and opened in accordance with the terms of the formal solicitation. The result will be the determination of the lowest, responsive, and responsible bidder.

Types of Procurement

The following are recognized as the primary different types of procurement.

- Public Works
- Personal Services
- Architectural and Engineering Services
- Purchased Goods and Services (not made in connection to a public works project)

1) Public Works

RCW 39.04 defines and governs the laws and regulations for public works projects for the District. Public works is defined in RCW 39.04.010 as “all work, construction, alteration, repair, or improvement other than ordinary maintenance, executed at the cost of the state or of any municipality, or which is by law a lien or charge on any property therein.”

All public works, including maintenance when performed by contract, shall comply with chapter RCW 39.12. Maintenance is further discussed and defined in WAC 296-127-010(7)(a)(iv) as keeping existing facilities in good usable, operation condition when the work is performed by contract. Furthermore, WAC 296-127-101(7)(b)(ii) defines ordinary maintenance, which is not public works, as maintenance work performed by the regular employees of the District.

The District must use competitive bidding for public works projects; state statutes do not establish any specific bid limits or specific competitive processes for library districts. The District established the following limits for public works projects:

- Informal Competition
Informal competition may be used for public works projects less than \$50,000. Contracts for the awarding of these informally competitive projects shall be awarded by the Library Director.
- Formal Competition
The formal competition or bidding process will be used for all public works projects equal to or in excess of \$50,000. Contracts for the awarding of public works projects using formal competition shall be awarded by the Board of Trustees.

The District may undertake public works projects with a cost of \$350,000 or less using a small works roster process, subject to the same procedures as are established in RCW 39.04.155.

Prevailing wages per RCW 39.12 are required on all public works and maintenance contracts of any size.

2) Personal Services

Personal services involve technical services and expertise provided by a consultant to accomplish a specific study, project, task, or other work. These activities and services are mostly intellectual in nature.

Except for architectural and engineering services, library districts have no statutory restrictions on contracting for personal services; alternatively, they have flexibility in setting their own

policies and limits. The following are the limits established by the District for the procurement of personal services:

- Minimal Competition
For purchases under \$7,500, the District may use minimal competition
- Informal Competition
For purchases from \$7,500 to \$50,000, the District may use informal competition.
- Formal Competition
For purchases in excess of \$50,000, the District must use formal competition. Contracts for the awarding of personal services using formal competition shall be awarded by the Board of Trustees.

3) Architectural and Engineering Services

Architectural and engineering services, although a type of personal service, have their own requirements established in RCW 39.80. All local governments, including library districts, must follow RCW 39.80 for procuring architectural and engineering (A/E) services. All contracts for architectural and engineering services shall be awarded by the Board of Trustees.

4) Purchased Goods and Services

Purchased goods and services, not in connection to a public works project, are those provided by vendors for routine, necessary, and continuing functions of the District. They are usually repetitive, routine, or mechanical in nature, often supporting the day-to-day operations of the District.

Library districts have no statutory restrictions on contracting for purchased goods and services; alternatively, they have flexibility in setting their own policies and limits. The following are the limits established by the District for procurement of purchased services.

- Minimal Competition
For purchases under \$7,500, the District may use minimal competition.
- Informal Competition
For purchases from \$7,500 to \$50,000, the District may use informal competition.
- Formal Competition
For purchases in excess of \$50,000, the District shall use formal competition. Contracts for the awarding of purchased goods and services using formal competition shall be awarded by the Board of Trustees.

Exceptions to Competitive Bidding Requirements

The following is a non-exclusive list of goods and services allowed to be exceptions from competitive bidding requirements.

- Goods and services that meet an emergency requirement (RCW 39.04.030)

- Original equipment manufacturer repair services
- Insurance and bonds
- Utilities
- Library materials
- Software maintenance and/or support services when procured from the proprietary owner of the software
- Professional development (conferences, publications, seminars/webinars)
- Purchases which are clearly and legitimately limited to a single source of supply
- Purchases made through a purchasing contract with the State of Washington or from established governmental price schedules

Competitive bidding requirements may also be waived pursuant to RCW 39.34.030 for purchases in cooperation with other public agencies or purchasing cooperatives, so long as the cooperative purchase was done in a manner consistent with the bidding and procurement requirements of the District, and the District has entered into an interlocal agreement with the other public agency or purchasing cooperative.

Grants

For all grants, either federal, state, or privately funded, the District shall ensure that the related purchase activity will be in accordance with the applicable rules, regulations, and any other terms and conditions contained within the grant award.

Environmentally Preferable Purchasing (EPP) Activities

A number of laws and executive orders require Washington state agencies to increase environmentally preferred purchasing (EPP). While the District is not required to follow the mandates of the state's EPP programs, the District's intent is to follow the program whenever economically feasible. Accordingly, strong consideration will be made in the selection of EPP compliant goods, even though an item's price may not be lower than a similar, non-compliant item.