

Why we do what we do:

Understanding Purchasing

Because it's the law!

- General Municipal Law
- Education Law
- New York State Finance Law

Because it makes sense!

Purchasing process is designed to provide Competition and to Maintain a Fair and Open Process

- Ensure fair and open competition;
- Guard against favoritism, improvidence, extravagance, fraud and corruption;
- Ensure that the results meet agency needs;
- Provide for checks and balances to regulate and oversee agency procurement activities; and
- Protect the interests of the State and its' taxpayers.

General Rules on Thresholds

- GML § 103(1) expressly provides:

Purchases of “commodities, services or technology” may not be “artificially divided” for the purpose of satisfying the “discretionary buying thresholds” established by General Municipal Law 103(1).

When determining whether a “purchase is an expenditure within the discretionary threshold amounts” established in General Municipal Law § 103(1), “the reasonably expected aggregate amount of all purchases of the same commodities, services or technology to be made within the twelve-month period commencing on the date of the purchase” must be considered.

Exceptions to the Requirement of GML 103

Basic statutory criteria to meet exception:

GML 103 (4) Emergency

- – Arise from accident or unforeseen occurrence or condition
- – Affects public buildings/property or life, health or safety

- GML 103 (6) Surplus/Second hand materials/Equipment (Government)
- Professional Services
- Sole Source (Very Limited Exception)
- State Finance Law 162
 - Preferred Sources
 - Certain State, County and Federal Contracts

Confirming Orders

- Purchases that have been made with a vendor, by phone or fax without a purchase order and before prior approval of the Purchasing Agent. Be aware the New Rochelle City School District will not be responsible for payment of any goods or services that do not have an Authorized Purchase Order prior to the commencement of services or the shipment of goods. The District does recognize that from time to time emergency situations may arise and in such cases contact the Purchasing Agent for prior approval.

Thresholds

All orders should have proper documentation to demonstrate how prices were determined (i.e. current catalog, fax, internet, etc.)

- \$1-\$4,999 Discretion of the Purchasing Agent with written quotes
- 5,000 - \$19,999 Documented written quotes from at least 3 vendors
- >\$20,000 Commodities – Competitive Bidding Required
- >\$35,000 Public Works – Competitive Bidding Required

NYS Preferred Source Vendors

Pursuant to State Finance Law 162, selecting a procurement method and supplier must be conducted in the following order:

- New York State Preferred Source Vendors: These are vendors who have received legislative approval to the right of first refusal - that is, vendors who should be considered first for the purchase of goods and services. The Preferred Suppliers are:
 - Corcraft www.corcraft.org. New York State Department of Correctional Services. (furniture, landscape modular systems, desks, chairs and file cabinets. Tel. 800-436-6321
 - Industries for the Blind of New York State, Inc. www.ibnys.org (file folders, post it notes, transparencies, examination gloves and CD-R products). Tel. 518-456-867
 - New York State Industries for the Disabled, Inc. www.nysid.org (blue exam books, janitorial supplies, field marking paint, printed apparel, and office supplies, etc.). Tel. 518-463-9706
 - New York State Office of Mental Health, Buy OMH www.omh.state.ny.us/omhweb/buyomh (desktop publishing, electronic repair, furniture, janitorial services, etc.)Tel. 518-474-0121

NYS OGS & Other Government Contract

NYS OGS Contracts

- NYS Office of General Services (OGS) <http://www.ogs.state.ny.us/>. These are contracts negotiated by the State with various vendors for reasonable prices of many goods and some services. Departments are advised to closely read through the specifications and requirements of these contracts to determine whether their need(s) can be met and contract numbers should be referenced on purchase requisitions.

Other Government Contracts

- Federal Contract GSA Schedule 70
 - Information Technology
- Federal Contract GSA Schedule 84
 - Law Enforcement Equipment

Piggyback

Piggyback

- Making a purchase based on an existing current contract that another government agency within the United States has entered into after a competitive solicitation process. The commodity/service being purchased must match the contract you are trying to "piggyback." The Purchasing Department must analyze the bid documents and seek approval of the agency and vendor, where applicable, before making such a purchase.
- This include National Cooperative, BOCES, County, and other School District.

In House Bid

- New Rochelle City School District in house bid.
 - Printing Services
 - Security Uniform and Lanyard
 - Music Supplies
 - Many others

Discretionary Spending

- **Discretionary Purchasing:** Discretionary purchases are procurements made below established monetary levels at the discretion of the District and within the guidelines set by the Office of the State Comptroller and without the need for a formal competitive procurement process. Discretionary purchasing increases can increase opportunities for Minority or Women-Owned Business Enterprise (MWBE) vendors and New York State Small Businesses to secure business with the state and also promotes the use of recycled or remanufactured commodities or technology.

Sole/Single Source

- **Sole Source/Single Source Process for Selecting a Supplier**
Sole Source procurement is used when it is proven that only one vendor is capable of supplying the required commodities or services. For such purchases of \$20,000 and above, advertisement or an exemption not to advertise is required. **See Purchase Dollar Threshold Requirements.** A project definition, justification or rationale for selecting the vendor and determination of the reasonableness of the price must be documented.
- **Single Source** procurement is used when the desired commodities or services can be supplied by several vendors, but there are material and substantial reasons to prefer one vendor over the others, such as the need to upgrade current equipment with parts or to obtain software from original manufacturer or to select a consultant for a particular expertise. For such purchases of \$20,000 and above, advertisement or an exemption not to advertise is required. A project definition, justification or rationale for selecting the vendor and determination of the reasonableness of the price must be documented.

County Contracts

- Westchester County

bps.westchestergov.com/savings-for-local-gov-ts/county-contracts-available-to-municipalities

- Rockland County

rocklandgov.com/departments/purchasing/county-contracts/

- Suffolk County

dpw.suffolkcountyny.gov/contractsearch/contractsearch.aspx

School District /BOCES Contracts

- Southern Westchester BOCES www.swboces.org/groups/49388/business_office/cooperative_bids
 - Office Supplies (WB MASON)
- Byram Hills School District
 - 17/18-01 Electrical Supplies
 - 17/18-02 Janitorial Supplies

Cooperative Contracts

- US Communities - www.uscommunities.org
- NJPA (National Joint Powers Alliance) - www.njpacoop.org
- NIPA/TCPN (National Intergovernmental Purchasing Alliance) www.nationalipa.org
- PEPPM (Pennsylvania Education Purchasing Program for Microcomputers) - www.peppm.org
- ED DATA (Educational Data Services) - www.ed-data.com
- NCPA (National Cooperative Purchasing Alliance) <http://www.ncpa.us>

Requisition and Attachment

Requisition Best Practices

- Review attachment after attaching it in Nvision (Clear and not upside down)
- Insert Contract # in description if it does not fit in Contract/Bid Ref# tab
- Budget Code/ Funds availability
- Check your requisition for misspelled words

NYS OGS/BOCES	Sole/Single Source	Staples/WB MASON/Grainger	In House Bid	Other Contract	Blanket
Quote with Contract # Listed – No handwritten Contract #	Sole/Single Source Letter. Quote	Log In-Staples Advantage Quote Log In-WB MASON Quote	Quote with - No handwritten Contract #	Quote with Bid # Listed – No handwritten Contract #	Contract Documentation/Award

Vendor Maintenance

Vendor Add: When it is determined that a new vendor will need to be added to the District's Vendor Database, the following procedure will be followed:

- Vendor MUST complete a W-9 form and provide phone # and email address.
- Email the W-9 form to sgovernale@nredlearn.org with the subject line: **ADD NEW VENDOR**

Vendor Change:

- Any changes to the Vendor Main information (physical address) will need a new W-9
- Specify changes in the body of the email and email it to sgovernale@nredlearn.org with subject line: **VENDOR CHANGE**, attach any correspondence from vendor.

Example:

Sheila Governale
Vendor Change
Hi Lola,
Vendor ID: 10353
Vendor Name: ABCD Consulting, Inc.
Add payment address: 1234 Main St New Rochelle, NY 10801
Correspondence from Vendor is attached for your info.
Thank you

Coming Soon

- Amazon Contract - US Communities
- In House Bid via Nvision
- Purchasing Website
- Home Depot – US Communities
- School Specialty Blanket Online Order

FAQ

- What happens after I submit the requisition?
 - The purchase order is subject to the regular approvals. When approved it will be emailed to vendor. PO will be emailed to you for any vendor that does not have an email address on file.
- When to contact your Purchasing Agent?
 - Expired contract and how to resource materials/supplies
 - Piggybacking on a National Cooperative
 - Other issues or even just to say HELLO or HEEEEELLPPPP!!!!

Questions and Comments?

