

Purchasing Policy

207.1 PURPOSE AND SCOPE

Agency Content

The purpose of this policy is to establish uniform procedures for the purchase of goods and services while ensuring compliance with the Ohio Revised Code and sound fiscal management practices.

This policy applies to all Village departments, officers, employees, boards, commissions, and enterprise operations.

207.2 POLICY

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It is the policy of the Village to procure goods and services in a fair, transparent, efficient, and fiscally responsible manner while complying with applicable federal, state, and local laws.

Village funds shall not be obligated except as authorized by law, appropriations, and this policy.

207.3 PURCHASE ORDERS

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Except as otherwise authorized by law or this policy, all purchases requiring payment to a vendor shall be supported by a properly approved purchase order before goods or services are ordered.

The Fiscal Officer shall review each purchase order for compliance with this policy, the Ohio Revised Code, appropriations, and the availability of funds. The Fiscal Officer may reject any purchase order that is incomplete, not authorized by law or this policy, exceeds available appropriations, lacks required approvals, or otherwise fails to satisfy applicable fiscal requirements.

A purchase order is not valid until it has been certified, dated, and signed by the Fiscal Officer or other certifying official authorized by law. Goods or services shall not be ordered before a valid purchase order has been issued. Backdating purchase orders is prohibited.

Purchases made without a valid purchase order are unauthorized and may result in personal liability to the extent permitted by law.

207.4 PROCUREMENT METHODS

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Purchases shall be made using the procurement method appropriate for the estimated value of the purchase and applicable legal requirements.

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207.4.1 PURCHASES UNDER \$10,000

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Purchases under \$10,000 do not require competitive quotations unless competitive quotations are required by law or directed by the Village Administrator.

207.4.2 PURCHASES OF \$10,000 UP TO THE STATUTORY COMPETITIVE BIDDING THRESHOLD

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- Whenever practicable, three comparative quotations should be obtained.

Quotations may be written, electronic, or otherwise documented.

Selection should be based upon the overall best value to the Village considering factors including price, quality, qualifications, experience, availability, delivery schedule, warranty, compatibility, and other relevant considerations.

207.4.3 PURCHASES REQUIRING COMPETITIVE BIDDING

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- Purchases meeting the competitive bidding requirements established by the Ohio Revised Code shall comply with all applicable statutory bidding requirements.

Nothing in this policy shall be construed to waive or modify any competitive bidding requirement imposed by law.

207.5 PROFESSIONAL SERVICES

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- Professional services shall be procured in accordance with applicable law and this policy.

Professional design services, including architecture, landscape architecture, professional engineering, and professional surveying services, shall be procured in accordance with ORC 153.65 through 153.71, as applicable.

When permitted by law, the Village Administrator may directly select a qualified design professional for projects with an estimated professional design fee below the threshold established in ORC 153.71, provided sufficient funds have been appropriated and certified by the Fiscal Officer.

207.6 MASTER PROFESSIONAL SERVICES AGREEMENTS

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The Village shall utilize the Master Professional Services Agreement approved by the legislative authority as the Village's standard contract form for professional services unless otherwise authorized by the Village Solicitor or the legislative authority.

The Village Administrator may execute Master Professional Services Agreements with qualified consultants selected in accordance with applicable law, this policy, and any authority delegated by the legislative authority.

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Individual Task Orders or other written authorizations may be issued pursuant to an approved Master Professional Services Agreement in accordance with its terms, provided all required appropriations, fiscal certifications, and approvals have been obtained.

Execution of a Master Professional Services Agreement does not authorize the expenditure of Village funds. All expenditures remain subject to applicable appropriations, fiscal certifications, and approvals required by law and this policy.

207.7 WAIVER OF QUOTATION REQUIREMENTS

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The Village Administrator may authorize procurement without obtaining the otherwise required number of quotations when obtaining quotations is not practicable or is in the Village's best interest.

Examples include:

- (a) Immediate protection of public health, safety, or welfare.
- (b) Emergency utility or infrastructure repairs.
- (c) Nuisance abatement requiring prompt action.
- (d) Limited availability of qualified vendors or contractors.
- (e) Specialized equipment, materials, or services.
- (f) Compatibility or continuity with existing equipment, systems, or ongoing projects.
- (g) Contractor familiarity with Village facilities or infrastructure where continuity would significantly benefit the Village.
- (h) The ability to mobilize within the required timeframe.
- (i) Other documented circumstances demonstrating that obtaining additional quotations is not practical or would not serve the Village's best interests.

The basis for the waiver should be documented and retained with the procurement file.

207.8 LEGISLATIVE APPROVAL

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Purchases and contracts requiring approval of the legislative authority under the Ohio Revised Code, Village ordinance, resolution or this policy shall not proceed until the required approval has been obtained.

Nothing in this policy limits the authority of the legislative authority to require approval of any purchase or contract.

207.9 ADMINISTRATIVE AUTHORITY

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The Village Administrator is responsible for administering this policy and authorizing purchases and contracts within the authority granted by the Ohio Revised Code, Village legislation, appropriations, and this policy.

The Fiscal Officer is responsible for administering the Village's purchasing and fiscal control procedures; certifying the availability of funds; ensuring compliance with applicable purchasing laws, fiscal certification requirements, and Village policy; and approving purchase orders and other purchasing documents as required by law and Village policy.

In the absence of the Village Administrator, the Mayor may exercise the administrative purchasing authority delegated by this policy.

207.10 EMERGENCY PURCHASES

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When immediate action is necessary to protect public health, safety, welfare, Village property, or critical infrastructure, the Village Administrator, or in the Village Administrator's absence, the Mayor, may authorize emergency purchases without following normal procurement procedures when delay would likely result in significant harm.

Emergency purchases should be limited to the minimum goods or services reasonably necessary to address the emergency and shall be documented as soon as practicable.

207.11 RECORDS

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Purchase requisitions, purchase orders, quotations, contracts, Master Professional Services Agreements, Task Orders, waivers, invoices, certifications, and other procurement records shall be maintained in accordance with the Village's records retention schedule.

Departments shall verify receipt of goods or services before payment is processed, and invoices shall be supported by appropriate purchasing documentation.

207.12 VIOLATIONS

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Employees who knowingly violate this policy or applicable purchasing requirements may be subject to disciplinary action in accordance with applicable Village personnel policies. Unauthorized purchases or contracts may also be subject to any remedies, liabilities, or other actions authorized by the Ohio Revised Code or other applicable law.