



TOWN OF CASCO

Purchasing Policy

Section 1. Purpose: The purpose of this policy is to standardize the purchasing procedure for the Town of Casco, resulting in a uniform purchasing policy in an effort to both save money and increase public confidence in the procedures for municipal purchasing. Additionally, it is to promote the fair and equitable treatment of all suppliers of goods and services and to clearly set forth the duties and responsibilities of the Town Manager, Department Heads, and any other designated staff.

Section 2. Applicability: This policy shall apply to all purchases and services made by or used by departments or agencies of the Town, except as otherwise specified herein.

Section 3. Definitions:

- A. Approved Vendor- Those vendors and contractors not on the disqualification list and possess the necessary expertise and qualifications.
- B. Bid most Advantageous to the Town -A bid chosen on the basis of price, quality of product, suitability of product, and the service reputation of the bidder and therefore may not necessarily mean the lowest bid received.
- C. Competitive Bidding - The process of obtaining the bid most advantageous to the Town for any purchase, whether through formal or informal bidding procedures including quotes.
- D. Informal Bid- A written or oral quotation obtained from approved vendor or contractor, but not required to be opened publicly at specified day, place, and time.
- E. Formal Bid -A written quotation obtained in a sealed envelope from approved vendor, having been publicized, and opened publicly at a specified day, place, and time.
- F. Field Purchase -Any informal purchase of supplies needed in small quantities for day-to-day operations made directly by a department head or their designee from an approved vendor.
- G. Purchase - The buying, contracting, renting, leasing, or otherwise acquiring supplies or services for a price.
- H. Purchase Order - Written documentation requesting approval for services or goods on behalf of the Town. For the purposes of this policy, a Purchasing Requisition Memo shall act as a substitute for a Purchase Order, at the Town Manager's discretion, and includes the product or service being purchased, vendor, cost, and any other relevant information.
- I. Cooperative Purchase - Purchases made by the Town in conjunction with, or from, another governmental or quasi-governmental agency such as the State of Maine, school, County, another municipality, Ecomaine, or Greater Portland Council of Governments.

TOWN OF CASCO

Purchasing Policy

- J. Emergency-Any situation or circumstance by its nature or severity, as deemed so by the Town Manager, that would inhibit the department from providing delivery of services when said services are or may be, needed that requires an override of the procedures set out in this policy.
- K. Services - The lease, rental, repair, maintenance, supplies, materials, or equipment necessary to Town Government.
- L. Specifications- The standards, including quality, set by the Town set forth as a measure of that which successful bidders must achieve. Includes both technical specifications which shall state formulations as broadly as practical, yet specific enough to describe the requirements, and non-technical specifications for bids, which shall state the quality required in general terms.

Section 4. Purchasing Parameters

A. Purchasing Agent

The Town Manager is designated as the Purchasing Agent for the Town. The Town Manager and Department Heads are authorized to spend within budget appropriations in accordance with this policy. The ranges listed are meant to be guidelines and not rigidly defined.

B. Cooperative Purchases

The Town Manager may make cooperative purchases without competitive bidding if the purchase being made after competitive bidding by the cooperative entity is at a price more advantageous than the Town would be likely to obtain by competitive bidding on its own. Amounts that exceed \$25,000 require Selectboard approval for inclusion to cooperative purchases/bidding.

C. Bid Waiver

When a purchase is inappropriate for competitive bidding due to the nature of the item, time constraints, or other limiting factors, the Selectboard may vote to waive the formal bid process.

D. Products, Goods & Equipment

1. **\$0 - \$999.** Defined as field purchases. Purchases may not be broken up for the purpose of avoiding additional requirements as listed in this section.
2. **\$1,000 - \$4,999.** Prior authorization is required. Department heads are required to submit a written request or purchase order to Town-Manager prior to commitment of funds. Formal

TOWN OF CASCO

Purchasing Policy

competitive bid is not required. However, the purchaser should endeavor to get the best value for the money spent. Town Manager or designee must approve the purchase.

3. **\$5,000 - \$24,999.** Prior authorization is required. Informal bids or quotes must be solicited from a minimum of three bidders. In cases when a quote from three bidders is not possible, documentation must be provided to the Town Manager and approved. Quotes must be attached to the formal request. Town Manager or designee must approve the purchase prior to commitment of funds.
4. **\$25,000 & Over.** Written bid specifications or equivalent is required and must be approved by the Town Manager prior to being advertised. This is a formal bid process. The Selectboard has final awarding responsibility. The Selectboard shall award to the Bid Most Advantageous to the Town.

E. Services' Contract

1. **\$0 - \$4,999.** One year or less in duration. Purchase Order authorized in advance is required; formal competitive bidding is not required; contractor shall be on approved vendor list. Town Manager, or designee, must approve the contract prior to commitment of funds.
2. **\$5,000 - \$49,000.** One year or less in duration. Purchase Order authorized in advance is required. Informal bids or quotes must be solicited from a minimum of three bidders, if available. Quotes must be attached to the formal request or explanation if not available. If within appropriation amounts, the contract only needs approval by the Town Manager, provided there is a termination clause; if outside appropriation amounts, it requires Town Manager recommendation, approval from the Selectboard, and potentially Town Meeting approval.
3. **\$50,000 & Over.** One year or less in duration. Written RFP specifications created by the Town Manager and approved by the Selectboard prior to being advertised is required. The RFP shall be advertised by the most efficient means possible in order to encourage the widest competition possible. Sealed proposals shall be specified and opened at a public meeting by the Town Manager or designee. The Selectboard has final awarding responsibility. The Selectboard may award the service contract to a bidder other than the lowest bidder if they believe it to be in the best interest of the Town.

TOWN OF CASCO

Purchasing Policy

4. **\$50,000 & Over One Year in Duration.** Contract requires ratification of an Annual Town Meeting Vote.
- F. **Record of Formal Bids & RFPs.** The Town Manager shall keep a record of all bids and RFPs submitted, and such record shall be open to proper inspection by any interested party.
- G. **Disqualification of Bidders.** The Town Manager shall have the exclusive authority to disqualify bidders who default on their bids, quotations, contracts, or purchase orders from receiving further awards from the Town. Such decision will be subject to the right of the disqualified bidder to appeal to the Selectboard for reversal or reinstatement.
- H. **Rejection of Bids & RFPs.** The Town reserves the right to reject any and all bids, or to accept the bid that appears to be in the best interest of the Town, investigate the qualifications of any bidder, and to waive or not waive any and all informalities in the bids when making an award.
- I. **Authorization of Documentation.** The Town Manager has the authorization to execute such documents that are required to complete the approved purchase.
- J. **Field Purchases.** Any Department Head or designee authorized to purchase items on behalf of the Town must supply receipts for all monies spent. Failure to do so may result in discipline. Town Manager shall have the exclusive authority to determine whether or not an employee has purchasing powers on behalf of the Town.

Section 5; Miscellaneous.

- A. **Emergencies.** In such defined times, the Town Manager may authorize immediate negotiated purchases of supplies or services, not to exceed \$15,000 that are needed to protect the best interests of the Town. The Town Manager will report to the Selectboard the use of these emergency funds at the next open Selectboard meeting.
- B. **Revision Power by the Town Manager.** The Town Manager shall examine each purchase order and shall have the authority to revise it as to quantity, quality, or estimated costs; but revision as to quality shall be only with the concurrence of the using department.
- C. **Tax Exemptions.** The Town Manager and Department Heads shall act to procure for the Town all Federal and State tax exemptions to which the Town is entitled.

TOWN OF CASCO

Purchasing Policy

Section 6. Conflicts of Interest

Any official, officer, or employee of the Town who has a financial interest, direct or indirect, or by reason of ownership of stock in any corporation, or ownership interest in a business entity, in any contract with the Town, or in the sale of any land, material, supplies, or services to the Town or to a contractor supplying the Town, shall make known that interest and shall refrain from voting upon or otherwise participating in his/her capacity as an official, officer, or employee in making such sale or otherwise in the making or performing of such contract.

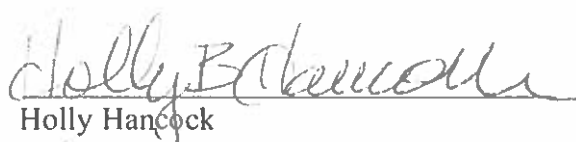
Any official, officer, or employee who willfully conceals such financial interest or willfully violates the requirement of this section shall be guilty of malfeasance in office or position and shall forfeit his/her office or position. Violation of this section with the express or implied knowledge of the person or business entity contracted with or making a sale to the Town shall, at the option of the Town, render the contract or sale voidable.

In all proceedings before the Town, every municipal official shall attempt to avoid the appearance of a conflict of interest by disclosure or abstention.

This policy supersedes any prior policy related to this subject.

Adopted this 20th day of July, 2021.


Mary-Venessa Fernandes


Holly Hancock


Robert MacDonald


Scott Avery