Requisition Policy & Procedures (less than $15,000)

Less than $15,000

No

Yes

Obtain AT LEAST 2 BIDS for all requisitions

Fill out Requisition Form, which requires:

1. Current Date and Date Requested/Needed for the receipt of goods or services
2. Requestor's name
3. Fill out requested items to include quantity, item number, description of item, price per item, and total. Please individualize and itemize items requested or attach other supporting itemized documentation as needed (i.e. on-line cart, bid list).
4. Provide any supporting documentation for justification of request.
5. Use MHBE Quotation Forms to attach bids from solicited vendors to requisition form (provide rationale if no competitive bids were selected in the comments section designated for remarks).
6. Select whether vendor used is sole source supplier, required supplier or recommended supplier. if applicable
7. Provide vendor name, address, and identification number and telephone number.
8. Get supervisor signature in space provided at top of form to document approval of purchase request. In most cases, only Program Directors can sign.
Aaron Jacobs can sign for requisitions up to $2,500.
9. Please denote if purchase is an inventoriable good.

Submit requisition and all supporting documentation to Fiscal Officer, Francisco Mendez-Tellez or Fiscal Administrator, Yomi Olobatuyi, in his absence (should take 3 to 5 days from this point).

Form will be forwarded to CFO for signature or ED in CFO's absence

CFO will supply form to Executive Assistant who will enter data into Requisition Log and will route Requisition to Procurement Manager or designee. CFO will also supply to Property Manager if purchase is an inventoriable good

Credit Card or Purchase Order? Credit Card purchases cannot exceed $5,000 and each card holder has a $10,000

Based on Procurement Mgr or designee's discretion and CPC policy, Requisition will either be processed as CPC or PO and will entered into Requisition Log accordingly.

Procurement Policies & Procedures Competitive Expedited Procurement

Is there only one source for goods or services that the Exchange requires?

Yes

No

Is there an emergency requiring the Exchange to (a) protect the public health, safety or welfare; b) preserve or protect the Exchange's property or systems; or (c); mitigate a threat to the continuation of services provided by the

Yes

No

Is there an urgent circumstance, including the need to make progress towards compliance with long-range deadlines set forth in federal or State law, in policy guidance from a Federal or State agency, or in terms of a grant received by the Exchange, where the use of more formal procurement methods would prevent the Exchange from making adequate progress towards compliance?

Yes

Competitive Bid/Proposal Checklist is filled out and completed through Pre-RFP Issuance. Bid /Proposal Checklist must be signed by Contract Monitor, CFO, and ED prior to publication.

RFP or "Invitation for Bids" is published on eMaryland Marketplace and the website of the Exchange and shall be advertised in any other reasonable manner. The Executive Director or Procurement Officer may solicit responses directly from any vendor.

Competitive Bid/Proposal Checklist is filled out and completed through RFP Issuance & Post-RFP Issuance

Competitive Bid/Proposal Checklist is filled out and completed through Bid Evaluation Process. If this procurement only evaluates price, no evaluation committee is necessary. If more than price is considered, e.g. technical specifications, it requires a evaluation committee.

Is the Contract valued at $200,000 or more? If so, Board Approval is required.

Competitive Bid/Proposal Checklist is filled out and completed through Pre-Board Approval Process if contract is valued at $200,000 or more. Bid/Proposal Checklist must be signed by Contract Monitor, CFO, ED, and Board Chairman prior to seeking Board Approval - AT LEAST 2 WEEKS PRIOR TO NEXT BOARD MEETING.

Competitive Bid/Proposal Checklist is filled out and completed through Post-Board Approval Process and then Award Process if approved by ED at less than $200,000 or the Board if $200,000 or more.

Procurement Policies & Procedures Competitive Sealed Bidding

Yes

Yes

Will the procurement be based on more than price?

No

Yes

Competitive Bid/Proposal Checklist is filled out and completed through Pre-RFP Issuance. Bid/Proposal Checklist must be signed by Contract Monitor, CFO, and ED prior to publication. May also require prior approval from CMS if it is an IT contract valued at more than $1 million.

RFP or "Invitation for Bids" is published on eMaryland Marketplace and the website of the Exchange and shall be advertised in any other reasonable manner. The Executive Director or Procurement Officer may solicit bids directly from any vendor.

1. Prequalification of bidders may be required
2. Bids must be submitted in a sealed envelope marked with the bidder's name. All bids shall be publicly opened at the time and place stated in the request

Competitive Bid/Proposal Checklist is filled out and completed through Post-RFP Issuance

Competitive Bid/Proposal Checklist is filled out and completed through Bid Evaluation Process. Only price is evaluated by Procurement Manager (no Evaluation Committee is necessary).

Is the Contract valued at $200,000 or more? If so, Board Approval is required.

Competitive Bid/Proposal Checklist is filled out and completed through Pre-Board Approval Process if contract is valued at $200,000 or more. Bid/ Proposal Checklist must be signed by Contract Monitor, CFO, ED, and Board Chairman prior to seeking Board Approval - AT LEAST 2 WEEKS PRIOR TO NEXT BOARD MEETING.

Competitive Bid/Proposal Checklist is filled out and completed through Post-Board Approval Process and then Award Process if approved by ED at less than $200,000 or the Board if $200,000 or more.

Procurement Policies & Procedures Competitive Sealed Proposals

Competitive Bid/Proposal Checklist is filled out and completed through Pre-RFP Issuance. Bid/Proposal Checklist must be signed by Contract Monitor, CFO, and ED prior to publication. May also require prior approval from CMS if it is an IT contract valued at more than $1 million.

RFP or "Invitation for Bids" is published on eMaryland Marketplace and the website of the Exchange and shall be advertised in any other reasonable manner. The Executive Director or Procurement Officer may solicit bids directly from any vendor.

Competitive Bid/Proposal Checklist is filled out and completed through Post-RFP Issuance

Competitive Bid/Proposal Checklist is filled out and completed through Bid Evaluation Process. Evaluation Committee will evaluate more than price, including technical specifications.

Is the Contract valued at $200,000 or more? If so, Board Approval is required.

Competitive Bid/Proposal Checklist is filled out and completed through Pre-Board Approval Process if contract is valued at $200,000 or more. Bid/ Proposal Checklist must be signed by Contract Monitor, CFO, ED, and Board Chairman prior to seeking Board Approval - AT LEAST 2 WEEKS PRIOR TO NEXT BOARD MEETING.

Competitive Bid/Proposal Checklist is filled out and completed through Post-Board Approval Process and then Award Process if approved by ED at less than $200,000 or the Board if $200,000 or more.

Procurement Policies & Procedures Sole Source Procurement

Yes

Non-Competitive Bid/Proposal Checklist is filled out and completed through Pre-RFP Issuance. Non-Competitive Bid & Proposal Checklist must be signed by Contract Monitor, CFO, and ED prior to solicitation. May also require prior approval from CMS if it is an IT contract valued at more than $1 million.

ED or Procurement Officer use a letter to request a proposal for sole source procurement. The letter refers to, or attaches, the terms and conditions of a proposed contract.

Non-Competitive Bid /Proposal Checklist is filled out and completed through Post-RFP Issuance

Non-Competitive Bid/Proposal Checklist is filled out and completed through Bid Evaluation Process.

Is the Contract valued at $50,000 or more? If so, Board Approval is required.

Non-Competitive Bid/Proposal Checklist is filled out and completed through Pre-Board Approval Process if contract is valued at $50,000 or more. Bid Proposal Checklist must be signed by Contract Monintor, CFO, ED, and Board Chairman prior to seeking Board Approval - AT LEAST 2 WEEKS PRIOR TO NEXT BOARD MEETING.

Non-Competitive Bid/Proposal Checklist is filled out and completed through Post-Board Approval Process and then Award Process if approved by ED at less than $50,000 or the Board if $50,000 or more.

Procurement Policies & Procedures Emergency Procurement

Yes

Non-Competitive Bid/Proposal Checklist is filled out and completed through Pre-RFP Issuance. Non-Competitive Bid/Proposal Checklist must be signed by Contract Monintor, CFO, and ED prior to publication. May also require prior approval from CMS if it is an IT contract valued at more than $1 million.

ED or Procurement Officer solicit responses from as many vendors as practicable and ensure procurement is undertaken with the maximum amount of transparency consistent with the circumstances of the emergency.

Non-Competitive Bid/Proposal Checklist is filled out and completed through Post-RFP Issuance.

Non-Competitive Bid & Proposal Checklist is filled out and completed through Bid Evaluation Process. Evaluation Committee may evaluate more than price, including technical specifications.

ED Decides Whether Emergency Circumstances Allow for Advance Board Approval.

Non-Competitive Bid/Proposal Checklist is filled out and completed through Pre-Board Approval Process if contract is valued at $50,000 or more and circumstances permit Board consideration. Bid/ Proposal Checklist must be signed by Contract Monitor, CFO, ED, and, where time permitting, Board Chairman prior to seeking Board Approval.

Non-Competitive Bid/Proposal Checklist is filled out and completed through Post-Board Approval Process and then Award Process if approved by ED or the Board (Board approval not required if emergency does not permit ED to obtain).