

## Financial Control Policy Manual January 10, 2023 Review

### Section 4.7.1 Procurement

- Under Procedure #2b related to Procurement by sealed bids, competitive proposals, or noncompetitive proposals added the following for clarification:
  - ii. For sealed bidding to be feasible, the following conditions should be present:
    - 1 A complete, adequate, and realistic specification or purchase description is available.
    - 2 Two or more responsible bidders are willing and able to compete effectively for the business.
    - 3 The procurement lends itself to a firm fixed price contract and the selection of the successful bidder can be made principally on the basis of price.
  - iii. The technique of competitive proposals is normally conducted with more than one source submitting an offer, and either a fixed price or cost-reimbursement type contract is awarded. It is generally used when conditions are not appropriate for the use of sealed bids. The following requirements must be met when using this method:
    - 1 Requests for proposals must be publicized and identify all evaluation factors and their relative importance. Any response to publicized requests for proposals must be considered to the maximum extent practical.
    - 2 Proposals must be solicited from an adequate number of qualified sources.
    - 3 SCH&DC shall use a written method for conducting technical evaluations of the proposals received and for selecting recipients.
    - 4 Contracts must be awarded to the responsible firm whose proposal is most advantageous to the program, with price and other factors considered.
    - 5 SCH&DC may use competitive proposal procedures for qualifications-based procurement of architectural/engineering (A/E) professional services whereby competitors' qualifications

are evaluated, and the most qualified competitor is selected, subject to negotiation of fair and reasonable compensation. The method, where price is not used as a selection factor, can only be used in the procurement of A/E professional services.

**Section 4.7.9 Credit Card Purchasing Authority**

- Add the position of [Director of Development/Marketing](#) as an authorized cardholder.