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San Diego Housing Commission

Amendments to Statement of Procurement Policy

Presentation to the SDHC Board of Commissioners
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Amendments to SDHC Statement of Procurement Policy

Introduction

- The Procurement Operations Department procures a variety of goods, services (including construction), supplies and equipment, such as:
 - Construction, consulting and professional services
 - Architectural, engineering, financial, investment, and legal services;
 - Affordable housing development new construction, and rehabilitation;
 - Office equipment, including computers, printers, and copiers;
 - Temporary employment services; and
 - Building maintenance, landscaping, plumbing, painting, uniform supplies, storage, trash disposal, janitorial, security, and travel services.



Amendments to SDHC Statement of Procurement Policy

Introduction (Continued)

Transaction Type	# in 2023
Solicitation Requests (SR) – primarily competitive bids	106
Emergency Purchase Requests (PR)	110
Purchase Orders	10,751
Contract Renewals	300-400

Purchase Order Dollar Value	# of Purchase Orders (2023)	% of Total Purchase Orders
<\$1,000	7,463	70.6%
\$1,001 - \$50,000	3,028	28.64%
>\$100,000	80	0.76%
TOTAL	10,751	100%



Amendments to SDHC Statement of Procurement Policy

Introduction (Continued)

The Statement of Procurement Policy:

- Broad framework of policies and guidelines
- Promotes administrative flexibility and efficiency
- Maintains prudent internal controls and compliance with applicable statutes and regulations

SDHC's Procurement System:

- Fair and equitable treatment
- Supplies and services (including construction) are procured efficiently.
- Promote competition in contracting.
- Assure that SDHC purchasing actions are in full compliance with applicable federal standards, U.S. Department of Housing and Urban Development regulations, state, and local laws.



Amendments to SDHC Statement of Procurement Policy Updates

- SDHC's Statement of Procurement policy has been periodically updated:
 - HUD Guidance
 - Expansion and reorganization
- The last amendment was approved in January 2017.
- Reasons for new proposed updates:
 - Concise
 - Fair and Consistent
 - Compliance



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Summary of Proposed Amendments

- Clarifying the Certification for Public Disclosure requirement for all contracts, including sole source and non-competitive contracts
- Addition of license and right-of-entry agreement to the Application Exclusions
- Addition of Request for Information Procurement method
- Addition of Construction Claim
- Addition of explanation of bond requirements for contractors and subcontractors
- Deletion of outdated footnotes
- Updating the threshold for small purchases to align with new HUD regulations
- Consolidation of the Procurement Methods to be more readable
- Clarifying when Design-Build Contracting may be used
- Addition of process for contractor to appeal a non-responsibility determination



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Summary of Proposed Amendments (Continued)

The following sections from the original Procurement Policy will be deleted and transferred to Administrative Regulations:

- **Section 3.3** Procurement Responsibilities
- **Section 4.1** Independent Cost Estimate and 4.2 Cost and Price Analysis
- **Section 4.4** Bids Deemed Unreasonable After Review for Price Reasonableness
- **Section 8** Solicitation and Advertising Process
- **Section 9** Process for Procurement of Goods and Services Using Federal and Non-Federal Funds
- **Section 10** Process for Procurement of Construction, Facility Improvements and Public Works
- **Section 11** Process for Procurement of Non-A/E Consultants
- **Section 12** Process for Procurement of Architects and Engineering Services
- **Section 15.1-15.4** Cooperative agreements requirements, documentation and evaluation process
- **Section 18.1-18.3** Contract drafting methods



Amendments to SDHC Statement of Procurement Policy

Staff Recommendations

That SDHC Board of Commissioners recommend that the Housing Authority of the City of San Diego take the following actions:

- 1) Adopt the amendments to SDHC's Statement of Procurement Policy, PO-PUR-373.01, as described in the staff report and shown in Attachment 1.
- 2) Authorize SDHC's President and Chief Executive Officer (President and CEO), or designee, to execute the approved amended Statement of Procurement Policy, PO-PUR-373.01, in a form and format approved by General Counsel, and to take such actions necessary and appropriate to implement these approvals. Housing Commission staff will notify the Housing Authority and the City Attorney's Office about any subsequent amendments or modifications to the documents, and other required documents, including amendments to any documents.



Questions & Comments

