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San Diego Housing Commission

Action to Amend SDHC's Statement of Procurement Policy

Housing Authority of the City of San Diego Agenda Item #2
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Actions to Amend SDHC's 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.



Actions to Amend SDHC's 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.

San Diego Municipal Code

- Section 98.0301(d)(8)(D) requires Housing Authority approval of amendments to any SDHC policy.



Actions to Amend SDHC's 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:
 - Include new applicable federal procurement rules and regulations
 - Clarify existing requirements
 - Move working level procedure provisions to administrative regulations and SDHC's Procurement Standards Operating Procedures Manual
 - Moving certain provisions to administrative regulations and the Housing Commission's Procurement Standard Operating Procedures Manual will give discretion to SDHC's President and CEO, or designee, to facilitate working level procedure procurement-related actions.



Actions to Amend SDHC's Statement of Procurement Policy

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 or the Procurement Department Standard Operating Procedures Manual:

- **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



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Staff Recommendations

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 as provided in Attachment 1.
- 2) Authorize SDHC's President and Chief Executive Officer (President and CEO), or designee, to self-certify the approved amended Statement of Procurement Policy, PO-PUR-373.01, pursuant to the United States Department of Housing and Urban Development's rules and regulations, in a form and format approved by General Counsel, and to take such actions necessary and appropriate to implement these approvals.



Questions & Comments

