

SHREWSBURY HOUSING AUTHORITY PROCUREMENT POLICY

This procurement policy has been adopted by the Shrewsbury Housing Authority ("SHA" or "Housing Authority") in order to comply with Massachusetts bidding statutes governing the procurement of supplies and services (MGL c.30B) the Uniform Procurement Act, construction related work (MGL c.149§44A-H; MGL c.149 §44A½; MGL c.149 §44A¾; MGL c.149 §29; MGL c.149 §26-27A; (MGL c.30 §39M;) and design services (MGL c.7 §38A½). This procurement policy supersedes any and all previous policies. This policy hereby incorporates by reference all provisions of the above-cited laws and regulations and adheres to the Code of Conduct for Public Employees, consistent with applicable state and federal laws. In the event an applicable law or regulation is modified or eliminated, or a new law or regulation is adopted, the revised law or regulation shall, to the extent inconsistent with this Procurement Policy, automatically supersede this Policy.

Purpose and Scope

The purpose of this Procurement Policy ("Policy") is to provide for the fair and equitable treatment of all persons or firms involved in purchasing by the Housing Authority; assure that supplies, services, and construction are procured efficiently, effectively, and at the most favorable prices available to the Housing Authority; promote competition in contracting; provide safeguards for maintaining a procurement system of quality and integrity; and assure that purchasing actions are in full compliance with applicable Federal and State laws and regulations.

I. PROCURING SUPPLIES AND SERVICES

A. Procurements for supplies and services governed by MGL c.30B, the Uniform Procurement Act, shall be made in the following manner:

Sound Business Practices

- (1) The Executive Director, hereinafter referred to as the Chief Procurement Officer ("CPO") or his/her authorized designee shall make procurements as necessary not to exceed \$9,999.99 in the open market using sound business practices to ensure that the price obtained is the most advantageous to the Housing Authority. Sound business practices is ensuring the receipt of a favorable price by periodically soliciting price lists or quotes.

Price Quotations

- (2) For the procurement of supplies and services estimated to cost between \$10,000.00 and \$34,999.99 the CPO or his/her authorized designee shall solicit price quotations either orally by telephone, or in writing from at least three (3) vendors using a prepared written description for the particular procurement. However, this does not require receiving three (3) quotes. The Housing Authority may award a contract on the basis of one or two quotes received. The

CPO must keep on file a record of all price quotations sought including names, addresses, and the dates and amounts of quotations. All documents relating to purchases and contracts under this section must be kept for a period of seven (7) years from date of final payment. **All procurements in excess of \$10,000.00 require a written and fully executed contract.**

Bids

(3) Invitation for Bids ("IFB"). For procurements for supplies and services estimated to cost **\$35,000.00** or more the CPO or his/her authorized designee may use competitive sealed bids, in accordance with MGL c.30B §5 and will select the lowest, responsive and responsible bidder. The IFB process is as follows:

- Bids shall be invited by advertising in a newspaper of general circulation once, two (2) weeks before the date specified for the opening of bids;
- IFBs may be e-mailed to all available vendors upon request; Procurements of a **\$100,000.00** or more shall also be advertised in the Goods and Services Bulletin.
- A copy of the bid notice must be posted in a conspicuous place at the Housing Authority for at least two week before the time specified for receipt of bids.
- A contract bid under this process shall be awarded to the lowest responsive and responsible bidder.

The CPO must keep on file with regard to every solicitation made all documents relating to these procurements under this section and shall be kept for a period of seven (7) years from date of final payment. This includes, a copy of the solicitation,, all bids received, a record of names, addresses, and the amount of bids.

Proposals

(4) Requests for Proposals ("RFP"). For procurements estimated to cost **\$35,000.00** and obtaining a service where qualifications but not price are the determining factor, utilize the RFP process pursuant to MGL c.30B §6 vs. the IFB process identified in (3) above. The RFP process is as follows:

- The CPO or his/her authorized designee must provide the board with written justification as to why it is advantageous and in the public interest to use this process;
- Criteria must be developed for each task; (MGL c.30B §6.)
- Evaluation Committee must be appointed;
- Allows contract award to proposer who has highest rating, not necessarily the lowest price;
- Two separate envelopes for proposal submission;

(5) Statewide Contract List. For goods and services included on the statewide contract list awarded by the State's Operational Services Division (OSD), the CPO or his/her authorized designee may purchase from a statewide contract vendor without any further solicitation or invitation to bid regardless of the dollar amount. The following must be completed:

- These procurements shall be documented;
- Expenditures of up to **\$9,999.99** shall be authorized by a standard purchase order form;
- Expenditures of **\$10,000.00** or more shall have a fully executed contract;

(6) Contracts in (2), (3) & (5) above may be entered into for a term greater than *three years*, including renewals, extensions, or options, except automated laundry or elevator services which shall be for a term voted by a majority of the Board before the procurement is made, but shall be no *greater than five (5) years*.

(7) If the purchase is made from any vendor other than one offering the lowest price on an IFB procurement, justification for such a bid rejection shall be in writing and kept with the bid documents.

B. Services Exempt From MGL c.30B

(1) In accordance with MGL c.30B §1(b)(9), a contract to purchase supplies or services from, or to dispose of supplies to, any agency or instrumentality of the federal government, the commonwealth, or any of its political subdivision is exempt from Chapter 30B procurement requirements.

(2) In accordance with MGL c.30B §1(b)(15), contracts with labor relations representatives, lawyers, designers, or certified public accountants are exempt from Chapter 30B procurement requirements.³

(3) In accordance with MGL c.30B §1(b)(30) a contract for the collection, transportation, receipt, processing or disposal of solid waste, recyclable or combustible materials.

C. Emergency Procurements Under MGL c.30B

If the time required to comply fully with Chapter 30B regulations would endanger the health or safety of people or property due to an unforeseen emergency, the needed **supply or service** may be procured without complying with the Chapter 30B requirements. To the extent possible the Housing Authority must maintain a record of each emergency procurement, document the basis for determining an emergency exists, name of vendor, amount, type of contract and list of supplies and services purchased under each contract. The Housing Authority may not artificially create an emergency by postponing normal purchases. An emergency procurement form must be submitted as soon as possible to the Goods and Services Bulletin for publication. This process cannot be used for construction related emergency procurements.

D. Sole Source Procurements Under MGL c.30B

- (1) The Housing Authority may make a sole source procurement of any supply or service under **\$35,000.00** when a reasonable investigation shows that there is only one practicable source for the required supply or service. This determination that only one practical source exists must be in writing. (Chapter 30B, Section 7).

E. Contract Funding

- (1) All procurement of equipment, materials, and non-personnel services shall be documented. Expenditures shall be supported by receipts and shall be made by standard purchase order. Each purchase, regardless of dollar amount, shall be approved by the CPO or his/her designee. On a monthly basis, in advance, the Director of Finance shall indicate to the CPO the amount of dollars in each program available in order to have sufficient funds available for payment. Purchase orders shall be filed with the resulting purchase documents.

II. CONSTRUCTION CONTRACTS⁵ BUILDING RELATED – VERTICAL CONSTRUCTION

When construction contracts are procured under the following methods, the Housing Authority shall apply prevailing wage rates in accordance with MGL c.149 §26-27A regardless of dollar amount. All construction contracts in the amount of **\$2,000.00** or more shall require a payment bond in an amount not less than one-half (½) of the contract price, in accordance with MGL c.149 §29. This requirement cannot be waived and letters of credit, checks or bank books cannot be accepted in lieu of a payment bond. The Housing Authority shall use the appropriate DHCD Front-end document on all state developments.

A. Small building related (vertical construction) and site work (horizontal construction) construction projects shall be awarded in the following manner:

- (1) For small building related construction contracts which include labor & materials estimated to cost less than **\$10,000.00**, the CPO or his/her authorized designee shall follow MGL c.149 §44A(2)(A) and use sound business practices in selecting the contractor and a record should be kept of the procurement recording, at minimum, the name and address of the contractor.
- (2) For small building related construction contracts which include labor & materials estimated to cost between **\$10,000.00 and \$25,000.00**, CPO must follow MGL c.149 44A(2)(B) procedures and **solicit written responses from at least three (3) contractors** through public notification of the contract at least two weeks before the deadline for receiving responses. **DHCD RECOMMENDS SEALED BIDS.** However, it does not

require receiving three written quotes. You may award a contract on the basis of one (1) or two (2) written quotes received. The Housing Authority shall:

- Public notification to contractors at least two (2) weeks before the deadline for responses, you are required to advertise the solicitation in the Central Register and on COMMBUYS, and post a notice on your jurisdiction's website and in a conspicuous place in or near your jurisdiction's primary office.
- The contract must be awarded to the responsive and responsible contractor offering to perform the contract at the lowest price.

The CPO shall keep on file a record of all price quotations including names, addresses, and the amounts of quotations. All documents relating to purchases and contracts under this section shall be kept for a period of seven (7) years from date of final payment.

(3) For construction contracts estimated to cost between **\$25,000.00 and \$100,000.00** the CPO or his/her authorized designee shall follow the sealed bid procedure of M.G.L. c.149 §44A (2)(c) identified in MGL c.30 sec.39M.: Bids shall be invited by advertising in the Central Register and a newspaper of general circulation once, two (2) weeks before the date specified for the opening of bids. Bid notice shall be posted in a conspicuous place at the Housing Authority; the notice must also be posted at the Housing Authority main office at least one week prior to deadline. The following must also be completed:

- Bidders must submit a five (5) percent bid deposit with their bids in the form of a certified, treasurer's or cashier's check from a responsible bank or trust company, cash or bid bond from a surety company.
- Bids are publicly opened and read at the time they are due and a contract bid under this process shall be awarded to the lowest eligible and responsible bidder.
- A payment bond in the amount of at least 50% must be furnished by the selected contractor.

(4) For construction contracts estimated to cost **\$100,000 to \$10,000,000.00** (contracts for the construction, demolition, maintenance, or repair of a building – vertical construction) the CPO or his/her authorized designee shall follow the sealed bid procedures required under MGL. c.149 §44A-M. These contracts require prevailing wage rates or if a federal project Davis Bacon Wage Rates and require a performance and payment bond in the full amount of the contract price.

The CPO must keep on file with regard to every solicitation made all documents relating to purchases and contracts under this section shall be kept for a period of seven (7) years from date of final payment. A copy of bid forms received, a record of names, addresses, and the amounts of bids (tabulation). Other requirements include the following:

- Filed sub-bids for selecting certain subcontractors on public construction contracts estimated to cost more than **\$100,000.00**. when sub-bid work estimated to cost more than \$20,000.00.
- Contractors and subcontractors submitting bids estimated to cost more than **\$100,000.00** must be certified by Division of Capital Asset Management and Maintenance (DCAMM) to be evaluated and certified for specific requirements relating to financial soundness and past performance.

- Bidders and sub-bidders must submit a five (5) percent bid deposit with their bids and sub-bids

(5) For construction contracts estimated to cost **\$10,000,000.00** or more (contracts for the construction, demolition, maintenance, or repair of a building – vertical construction) the CPO or his/her authorized designee shall follow the pre-qualification process and sealed bid procedures required under MGL. c.149 §44D ½ and MGL c.149 §44D ¾.

III. NON-BUILDING RELATED CONSTRUCTION, HORIZONTAL CONSTRUCTION & CONSTRUCTION MATERIALS

- (1) For public works construction, i.e., site work (horizontal construction) labor & materials or for the purchase of construction materials with no labor estimated to cost **\$10,000.00** or more the CPO or his/her authorized designee shall follow the sealed bid procedure under M.G.L. c.30, § 39M and use the appropriate DHCD Construction Front-End. The Housing Authority also has the discretion to utilize MGL c.30B procurement requirements as outlined below & in the attached summary. All of these contracts require prevailing wage rates and a payment bond in an amount not less than one-half (½) of the contract price is required when labor & materials are involved. **On projects \$50,000.00 or more DHCD requires a performance and payment bond in 100% of the contract amount.**
- (2) As stated in #1 above, the Housing Authority also has the option of using Chapter 30B for horizontal construction projects that include labor & materials estimated to cost between **\$0 to \$9,999.00; \$10,000.00 to \$34,999.99 and and \$35,000.00 or more.. These procedures are in the attached summary.** These contracts require prevailing wage rates and a payment bond in an amount not less than one-half (½) of the contract price if cost is \$2,000 or more if labor & materials are involved.
 - The Housing Authority may be part of a local city or town governmental procurement, i.e, site work if upon request by the Housing Authority the contracting governmental agency includes the Housing Authority in its initial advertisement for bids by describing the work and location of work to be performed for the Housing Authority.

The CPO shall keep on file a record of invitation made and offers received, a record of names, addresses, and the amounts of bids shall be kept in the file with regard to every solicitation made. All documents relating to purchases and contracts under this section shall be kept for a period of seven (7) years from date of final payment. A copy of invitation made and offers received, a record of names, addresses, and the amounts of bids.

- For the purchase of **construction materials only (no labor)** estimated to cost between **\$0 and \$9,999.99** the CPO or his/her designee may use **MGL c.30B §5** using sound business judgment. Use a written specification for the particular procurement.
- For the purchase of **construction materials⁷ only (no labor)** estimated to cost between **\$10,000.00 and \$35,999.00** the CPO or his/her designee

may use **MGL c.30B §5** to solicit price quotations either orally by telephone, or in writing from at least three (3) vendors using a prepared written specification for the particular procurement. However, this does not require receiving three (3) quotes. The Housing Authority may award a contract on the basis of one or two quotes received.

(5) For the purchase of **construction materials** only (**no labor**) estimated to cost **\$35,000.00** or more the CPO or his/her designee may use **MGL c.30B §5** by advertising for Bids in a newspaper of general circulation once two (2) weeks before bid opening. Contract is awarded to lowest eligible and responsible bidder.

The CPO must keep on file with regard to every solicitation made all documents relating to purchases and contracts under this section shall be kept for a period of seven (7) years from date of final payment. A copy of invitation made and offers received, a record of names, addresses, and the amounts of bids.

IV. THE BOARD

(1) The CPO shall submit all bids and quotes \$10,000.00 and up at the next regular meeting and the Board must vote to authorize the award of the bid.

(2) A CPO may not solicit or award a contract for a term greater than *five (5) years, including renewals, extensions, or options except for automated laundry or elevator services which shall be for a term voted by the Board. (No greater than 10 years)*

(3) A written contract is required for supply & service procurements of 10,000.00 or more. Purchase under \$10,000 may be made with a purchase order.

(4) Applicable rules established by the Department of Housing and Community Development and the Department of Housing and Urban Development, and their respective Inspector Generals' shall be adhered to. These procedures and any changes thereto will be submitted to the Board for approval.

(5) Lack of competition is permissible only when an emergency exists which permits no delay because of the possibility of injury, loss of life, or destruction of property, or when only one source of supply is available and the CPO or his/her designee shall so certify. For the purposes of emergency situations involving construction related work, a DCAM waiver shall be required. For supplies and services, the Chapter 30B emergency procedures are to be followed.

(6) Positive efforts shall be made by the CPO to use small minority-owned and women owned businesses as a source for supplies and services. Such efforts should include developing a bidder's mailing list for these sources, and encouraging these businesses to compete for contracts to be awarded.

**V. DELEGATION OF PROCUREMENT OFFICER'S
POWERS AND DUTIES**

As this relates to MGL c.30B procurements, the CPO may delegate his powers and duties in accordance with this section to one or more employees of the Housing Authority. A delegation shall be in writing, be signed by the CPO, and state the activity or function authorized and the duration of the delegation. A delegation may be in specific or general terms, may be limited to a particular procurement or class of procurements, and may be conditioned upon compliance, with specified procedures. A delegation may be revoked or amended whenever the CPO determines that revocation or amendment is in the best interests of the governmental body. A delegation of power or duties by a procurement officer and any revocation or amendment thereof shall not take effect until a copy of the same has been filed with the office of the inspector general.

CONSTRUCTION BIDDING SUMMARY

BUILDING RELATED WORK – MGL

c.149 §44A-M TYPE OF WORK

Vertical Construction - Building related work, labor & materials, labor only, estimated cost to cost **less than \$10,000.00**

Vertical Construction - Building related work, labor & materials, labor only, estimated to cost between **\$10,000.00 - \$24,999.00**

Vertical Construction - Building related work labor and materials estimated to cost between **\$25,000.00 - \$100,000.00;**

BIDDING PROCEDURES

Solicit written quotes in accordance with **M.G.L. c.149 §44A (2) (A), as amended by C.193 of the Acts of 2004** from a prepared scope of work from no fewer than 3 persons/firms customarily providing the required service. Apply for prevailing wages &/or Davis Bacon. Payment bond required in ½ of contract amount if contract amount is **\$2,000** or more. Award to the responsible person at the lowest price quote.

Solicit written responses through public notification process in accordance with **M.G.L. c.149, §44A(2)(B), as amended by C.193 of the Acts of 2004**. Notice shall include a scope of work statement defining the work to be performed and work requirements. Payment bond required in ½ of contract amount. Apply for prevailing wages &/or Davis Bacon.

Public competitive sealed bids in accordance with **M.G.L. c.149, §44A(2)(C), as amended by C.193 of the Acts of 2004**. No DCAM certification or filed sub-bids required. Apply for prevailing wages &/or Davis Bacon. 5% Bid Deposit Required. Minimum payment bond in amount ½ of contract amount. On DHCD jobs full performance & payment bonds are required if cost is estimated over **\$50,000.00**.

No DCAM Certification; No filed Sub Bids

Vertical Construction - Building related work labor and materials estimated to cost between **\$100,000.00 - \$10,000,000.00 ;**

Public bid in accordance with **M.G.L. c.149, §44A(2)(D), amended by C.193 of the Acts of 2004.** GC must be DCAM certified and 100% Performance & payment bonds required for GC. Filed sub-bids required if estimated greater than \$20,000.00 & performance & payment bonds at the request of GC. General's & subs must provide a 5% bid deposit with its bid. **DCAM Certification for Generals. Effective 01/1/05 filed subcontracts must be DCAM certified.**

PROCUREMENT OF SUPPLIES & SERVICES

CONTRACT TYPE	BIDDING PROCEDURES - MGL c. 30B §§4,5 & 6
<p>MAXIMUM CONTRACT TERM THREE YEARS, UNLESS BOARD VOTE AUTHORIZES LONGER PRIOR TO BIDDING</p> <p><u>EXAMPLES OF SUPPLIES</u></p> <p>Appliances; Hardware; Vehicles; Snow & Lawn Equipment; Office Furniture; Office Equipment;</p> <p><u>EXAMPLES OF SERVICES</u></p> <p>Janitorial Services; Exterminating Services; Yard Maintenance; Cleaning Services; Oil Burner Cleaning; Fire Alarm Testing; <i>No repairs</i> Elevator Maintenance; <i>No Repairs</i></p>	<p style="text-align: center;">MGL c.30B §4(c) \$0 - \$10,000 USE SOUND BUSINESS PRACTICES</p> <ul style="list-style-type: none"> ✓ Prepare Scope of Work or Product Description; ✓ Purchase may be made via Purchase Order; ✓ 25% CAP on additional contract expenditures; <hr/> <p style="text-align: center;">MGL c.30B §4(b) \$10,000 - \$34,999 SOLICIT THREE ORAL OR WRITTEN QUOTES</p> <ul style="list-style-type: none"> ✓ Prepare a Scope of Work or Product Description; ✓ Requires a fully executed contract; <i>Never Use Vendor's Contract</i> ✓ 25% CAP on additional contract expenditures; <hr/> <p style="text-align: center;">MGL c.30B §5 \$35,000 or more SEALED BIDS - INVITATION TO BID (IFB)</p> <ul style="list-style-type: none"> ✓ To exercise your option to renew, LHA board must vote prior to bidding; ✓ Advertise once in Newspaper at least two weeks before bids are due and post on bulletin board or LHA website; If greater than \$100K also advertise in Goods & Services Bulletin; ✓ Prepare a Scope of Work or Product Description in IFB; ✓ Requires an executed contract which is part of IFB; <i>Never Use Vendor's Contract</i> ✓ 25% CAP on additional contract expenditures;
<p style="text-align: center;">PROCURING SERVICES USING REQUEST FOR PROPOSAL (RFP) PROCESS</p>	<p style="text-align: center;">MGL c.30B §6 - \$35,000 or more REQUEST FOR PROPOSALS (RFP)</p> <ul style="list-style-type: none"> ✓ Form evaluation committee; (EC)(Cannot be LHA Board ✓ Develop criteria for each task. Cannot use numerical criteria Highly Advantageous, Advantageous, Unacceptable ✓ Advertise in Newspaper for Sealed Bids; if greater than \$100K also advertise in Goods & Services Bulletin; ✓ RFP process requires bids to be submitted in two separate sealed envelopes. One for Non-price proposal & one for price proposal. ✓ EC reviews & scores proposals prior to opening price proposal; RFP CONTRACT AWARD IS BASED ON HIGHEST CRITERIA RATING WHICH MAY NOT BE THE LOWEST PRICE
<p style="text-align: center;">YOU MAY NOT MAKE A SOLE-SOURCE PROCUREMENT OF \$35,000 OR MORE EXCEPT FOR THE ITEMS LISTED BELOW MGL c.30B s.7(a)</p> <p style="text-align: center;"><i>Utilities, Software maintenance, library books and educational materials</i></p>	<p style="text-align: center;"><u>MGL c.30B §7 SOLE - SOURCE PROCUREMENTS CONTRACTS UNDER \$35,000;</u></p> <ul style="list-style-type: none"> ✓ Board must vote to justify by way of reasonable investigation why only one source is practical; ✓ You must maintain a written record of every sole-source procurement which must include, the contractors name, contract type & amount, the supply or services procured and why it was determined to use this process; ✓ Place notice in Goods & Services Bulletin of procurement; ✓ 25% CAP on additional contract expenditures;

BIDDING REQUIREMENTS FOR LHAs

HORIZONTAL CONSTRUCTION

SITE WORK LABOR & MATERIALS; CONSTRUCTION MATERIALS, NO LABOR

THRESHOLD	PROCEDURES Use DHCD Front-Ends for Non-Building Related Work
MGL c.30B §4 \$0-10,000	<u>USE SOUND BUSINESS PRACTICES</u> ✓ Prepare a Bidding Package that includes a Scope of Work and Wage Rates; ✓ No Bid Deposit Required; ✓ No Payment Bond Required; ✓ Give Entire Package to Contractor(s) who customarily perform the type of Work or to a supplier of Construction Materials; ✓ Keep a record which at a minimum must include the name & address of the person from whom services were procured; ✓ Award to the responsible person at the lowest quote; ✓ Obtain a Certificate of Insurance; <i>Requirements should be in Terms & Conditions</i> ✓ Pay Contractor once Work has been completed to LHA's Satisfaction;
MGL c.30 §39M or MGL c.30B §5 \$10,000 to 25,000 Labor & Materials	<u>ADVERTISE FOR SEALED BIDS</u> ✓ Prepare a Bid Package that includes a Scope of Work, Wage Rates; ✓ Advertise in the Central Register & Newspaper, once two weeks prior to bid opening and post on bulletin board one week before bids are due; ✓ 5 % Bid Deposit – MGL c.30 s.39M; No Bid Deposit MGL c.30B; §5) ✓ No Payment Bond Required; ✓ Award to the lowest eligible & responsible bidder; ✓ Obtain a Certificate of Insurance; <i>Requirements should be in Terms & Conditions</i> ; ✓ Pay Contractor once work is completed to LHA's Satisfaction; ✓ 10 Hour OSHA Approved Training required on Contracts is \$10,000 or more; ✓ OSHA cards to be submitted with certified payrolls;
MGL c.30 §39M \$25,000 or MORE Labor & Materials	<u>ADVERTISE FOR SEALED BIDS</u> ✓ Prepare a Bidding Package Using DHCD Front-End containing a Scope of Work and Wage Rates; ✓ Advertise in Central Register & Newspaper, once two weeks prior to bid opening and post on bulletin board one week before bids are due; ✓ 5% Bid Deposit Required; ✓ Award to the lowest eligible & responsible bidder; ✓ Execute Contract subject to DHCD approval; ✓ DHCD requires Performance & Payment Bonds in 100% of Contract Amount; ✓ Obtain a Certificate of Insurance; ✓ Schedule a Preconstruction Meeting and Issue Notice to Proceed; ✓ OSHA cards to be submitted with certified payrolls;
Construction Materials No Labor MGL c.30 §39M or MGL c.30B §5 \$10,000 or more;	<u>ADVERTISE FOR SEALED BIDS</u> ✓ Prepare a Bidding Package that includes Product Description & Delivery Requirements; ✓ Advertise in the Central Register & Newspaper, once two weeks before bids are due and post on bulletin board one week before bids are due; ✓ 5 % Bid Deposit – MGL c.30 §39M; No Bid Deposit MGL c.30B; §5 ✓ No Payment Bond Required; ✓ Award to lowest responsible bidder; ✓ Obtain a Certificate of Insurance; <i>Requirements should be in Terms & Conditions</i> ✓ Pay Vendor once order has been fulfilled to LHA's Satisfaction;

BIDDING REQUIREMENTS FOR LHAs

VERTICAL CONSTRUCTION

DOLLAR THRESHOLD	PROCEDURES
<p>MGL c.149 §44(2)(A) \$0 to \$10,000 ↓ See DHCD Small Projects Manual</p>	<p align="center">USE SOUND BUSINESS PRACTICES</p> <p align="center"><i>MEANS ENSURING THE RECEIPT OF A FAVORABLE PRICE BASED ON A SCOPE OF WORK; ADHERING TO A CODE OF CONDUCT IN ORDER TO AVOID CONFLICTS OF INTEREST; AND AVOID VIOLATING PUBLIC BID LAWS.</i></p> <ul style="list-style-type: none"> ➤ Decide the type of work you need performed; ➤ Prepare a Bid Package using DHCD's \$0-\$10K Front-End and include a scope of work & wage rates; ➤ No Bid Deposit or Bond Requirements ➤ Give the entire package to Contractor(s) who customarily perform the type of work; ➤ Keep a record which, at a minimum, must include the name & address of the person from whom the services were procured; ➤ Award to the responsible person with the lowest price quote; ➤ Obtain appropriate Certificate of Insurance; <p align="center">↻ Issue Notice to Proceed and LHA Tax Exempt Number; ↻↓</p>
<p>MGL c.149 §44(2)(B) \$10,000 to \$25,000 See DHCD Small Projects Manual ↑</p>	<p align="center">PUBLIC NOTIFICATION PROCESS</p> <ul style="list-style-type: none"> ➤ Decide the type of work you need performed; ➤ Prepare a Bid Package using DHCD's \$10-\$25K Front-End which and include a scope of work & wage rates; ➤ No Bid Deposit or Bond Requirements; ➤ Obtain <u>written</u> quotes through Public Notification Process; ➤ Advertise Public Notification once, 2 weeks prior to obtaining quotes in the Central Register & COMMBUYS; Follow prompts & include: <ul style="list-style-type: none"> A statement defining the work, where & how scope of work can be obtained, expected time of completion; deadline for quote submission, LHA contact, phone # or e-mail ➤ Quotes may be hand delivered, mailed, faxed or e-mailed; ➤ Award to the responsible person at the lowest price quote; ➤ Obtain appropriate Certificate of Insurance; <p align="center">↻ 10 Hour OSHA Training Required on projects estimated to cost \$10,000 or more ↻¹</p>
<p>MGL c.149 §44(2)(C) \$25,000 to \$100,000</p>	<p align="center">ADVERTISE FOR SEALED BIDS²</p> <ul style="list-style-type: none"> ➤ Designer prepares scope of work & specification using DHCD's \$25-\$100K Front-End;³ ➤ Apply for wages rates and include in specification; ➤ Advertise in Central Register and a local newspaper of general circulation in the locality of the project - once, 2 weeks prior to bid submission; ➤ 5% bid deposit is required; ➤ NO DCAM CERTIFICATION; NO FILED SUB BIDS ➤ DHCD Requires Performance & Payment Bonds in 100% of the contract amount;
<p>MGLc.149 §44(2)(D) \$100,000 to \$10M</p>	<p align="center">ADVERTISE FOR SEALED BIDS</p> <ul style="list-style-type: none"> ➤ Designer prepares scope of work & specification using DHCD's \$100K - \$10M Front-End; ➤ Apply for wage rates and include in specification ➤ Advertise in the Central Register & a newspaper of general circulation in the locality of the project - once 2 weeks prior to <u>1st bid opening</u>;⁴ ➤ 5% bid deposit required for both Subs and GCs; ➤ Requires a DCAM CERTIFIED Prime Contractor in applicable category; ➤ Requires DCAM CERTIFIED filed sub bids required on trades w/an estimated value of \$20,000 or more; ➤ Appropriate DCAM Certificate of Eligibility & Update Statement for Subs & GCs; ➤ Performance & Payment Bonds from GC in 100% of contract amount;

¹ 10 Hours OSHA Training Cards are to be submitted to LHA with first payroll submission.

² All bids (including filed sub bids) are subject to DHCD review & approval prior to contract execution.

³ Designer is selected either by DHCD designer selection, a House Doctor or In-House DHCD Design Staff.

⁴ Filed sub bids.

REGULAR MEETING OF THE SHREWSBURY HOUSING AUTHORITY

DATE: 8/16/2016

WHERE: Francis Gardens Ct.

TIME: 5:30 p.m

BOARD MEMBERS PRESENT 4

VOTE Unanimous

P.C. yes
R.R. yes
M.V. yes
T.C. yes

CERTIFIED AS A TRUE AND CORRECT COPY OF A RESOLUTION ADOPTED
AT SAID MEETING FILE AND OF RECORD BY,

Kelly Bergeron
8/16/2016