

# **Procurement, Contract Management & Section 3**

## **July 24- 25, 2013, Chestnut Ridge Resort, Blairsville, PA**

This seminar focuses on HUD's handbook 7460.8 Rev 2, which includes essential information for PHAs to comply with HUD regulations. Understanding the handbook and how it relates to project-based accounting, budgeting and management will help delegate more procurement responsibility to your sites. By the end of the seminar, you should understand how to obtain the highest quality goods and services for the right cost, delivered on time and in compliance with applicable laws and policies. In addition, you can learn to estimate costs of goods and services, develop criteria for analyzing proposals, and save costs in your procurement operation. The seminar also includes a special section on implementing Sec. 3 programs.

Understanding the handbook and how to implement it makes sure you know: what is mandatory; important definitions, including micro purchase, intended to "drill down" procurement to the site; ways to simplify and streamline requirements to encourage more decentralized procurement; and have guidance on ethics in procurement and contract management

The seminar will be taught by Jay Ortenza, Nan McKay Associates, who has over 34 years housing experience in both public and private sectors. He recently conducted expansive inspection training for the Philadelphia Housing Authority as part of their MTW initiatives. He also assisted the Chicago Housing Authority with a complete rewrite of their Housing Quality Standards inspections manual.

### **Seminar Cost**

**Two days: \$320/person** (WPHDA members); **\$335/person** (non-members)  
Optional certification exam: \$150/person  
(Online exam to be scheduled with NanMcKay after seminar.)

(Seminar fee includes course materials, breaks, and lunches on both days.)

### **Hotel Reservation**

**Deadline: June 23, 2013**

**Hampton Inn Chestnut Ridge**  
62 Pine Ridge Road  
Blairsville, PA 15717

(Hotel is located immediately adjacent to Chestnut Ridge Resort.)

Call **724-459-5920** and ask for the WPHDA rate of \$101 per night plus tax. This rate includes a hot breakfast buffet.

(Tax-exempt agencies must present their certificates when checking in.)

### **Seminar Registration**

**Due: July 9, 2013**

Return enclosed registration form with check payable to Western Pennsylvania Housing Directors Association.

**Questions?** Please contact Julie Kascal at 412.661.0591 or [jkascal@hotmail.com](mailto:jkascal@hotmail.com).

Seminar sponsored by the Western Pennsylvania Housing Directors Association.

# *Agenda: Procurement, Contract Management & Section 3*

## *July 24 - 25, 2013*

### **DAY ONE – 8:00 a.m. to 4:30 p.m.**

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- 8:00 Registration**
- 8:30 Welcome & Introductions**
- 8:45 Review of Applicable Regulations**
- 24 CFR Part 85
  - HUD Handbook 7460.8 Rev 2
- 10:15 Break**
- 10:30 Procurement of Goods & Services**
- Procurement Policy
  - Contracting Officer
  - Procurement Planning
  - Independent Cost Estimate
- 11:00 Solicitation Process**
- Small Purchases
  - Micro Purchases
  - Blank Purchase Agreements
  - Purchase Orders
- 12:00 Break - Lunch**
- 1:00 Solicitation Process (continued)**
- Purchasing Cards
  - Sealed Bidding
  - Contractor Responsibility
  - Competitive Proposals
  - Qualification Based Selection
  - Non Competitive Procurements
  - Section 3, Small Business Efforts & Contracting with Residents
  - Cooperative Purchasing
- 3:15 Break**
- 3:30 Specifications & Statement of Work**
- Types of Specifications
  - Standardizing Inventory
  - Elements of Statement of Work
  - Award of Contract
  - Fixed Price Contracts
  - Cost Reimbursement Contracts
  - Award & Execution of Contracts
- 4:30 End of Day One**

### **DAY TWO – 8:00 a.m. to 4:30 p.m.**

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- 8:00 Contract Administration**
- Receipt of Procured Materials/Services
  - Contract Management
  - Monitoring & Inspection
  - Davis Bacon Requirements
  - Contract Modification
  - Warranties
  - Work Completion
  - Contract Termination
- Protests, Appeals & Remedies**
- State and Local Laws on Procurement**
- Project File Creation**
- Audits & Monitoring**
- 12:00 Break - Lunch**
- 1:00 Section 3 Requirements**
- Learning objectives
  - Section 3 Regulations
    - HUD Handbook
    - HUD Policy
- 2:30 Who is Eligible for Section 3**
- Developing a HA Section 3 Plan
  - Eligibility
- 3:15 Break**
- 3:30 Outreach to Section 3 Businesses**
- Creating Business Opportunities
  - Training & Initiatives
  - Administrative
  - Services
  - Construction
  - Building Maintenance
- Section 3 and the HA's Procurement Policy**
- Contracting with Section 3 Business
  - Case Study Review
  - Insuring HUD Compliance
- 4:30 End of Session**

# Western Pennsylvania Housing Directors Association Training

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### Registration Form

Authority \_\_\_\_\_

Address \_\_\_\_\_

Contact person \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

#### **REGISTRATION**

Participant Name **and** Title

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**Total MEMBER Registrations @ \$320/person** \_\_\_\_\_ = \$ \_\_\_\_\_

**Total NON-MEMBER Registrations @ \$33/person** \_\_\_\_\_ = \$ \_\_\_\_\_

**Number online certification exams @ \$150/person** \_\_\_\_\_ = \$ \_\_\_\_\_

**TOTAL DUE** \_\_\_\_\_ \$ \_\_\_\_\_

Please make checks payable to: Western Pennsylvania Housing Directors Association

Mail to: Western Pennsylvania Housing Directors Association, 1405 Browning Road, Pittsburgh, PA 15206

**Questions?** Please contact Julie Kascal at 412.661.0591 or [jkascal@hotmail.com](mailto:jkascal@hotmail.com).