

Procurement: HUD and State Requirements

Wednesday, October 6, 2021, Indiana, PA

Every PHA carries out multiple procurements every year. The goal of each one is to obtain a quality product or service, from a capable provider, at a reasonable cost, delivered in a timely manner. AND (it's an important "and") in compliance with all federal and state laws and HUD regulations governing procurement by public agencies.

This seminar provides a comprehensive review of these laws and requirements and equips authority personnel with the information that they need to ensure compliance. It covers all types of procurements and procedures, such as cost and price analysis, writing good specifications, bidding, proposal review, types of contracts, change orders, required HUD forms, internal controls, MBE, WBE and Section 3 assistance, and *much, much more*. Additionally, any applicable changes resulting from recent special federal funding programs are included. *(See Seminar Agenda on opposite side for a complete list of topics.)*

Leading the seminar will be **MaryAnn Russ, CEO/President, Off the Grid Consulting**. Before returning to consulting in 2016, Ms. Russ held numerous high-level positions including HUD Deputy Assistant Secretary for Public and Assisted Housing, Executive Director of the Council of Large Public Housing Authorities, Executive Director of the Wilmington (DE) Housing Authority, Director of Training at the National Center for Housing Management, Principal Associate for Abt Associates, and most recently as the CEO and President of the Dallas Housing Authority, the largest housing authority in Texas. During her tenure there, the public housing and Housing Choice Voucher programs went from HUD's troubled agency list to high performer status

Seminar Registration	Due: Friday, September 24, 2021
Return enclosed registration form with seminar fee to Western Pennsylvania Housing Directors Association.	
Seminar Cost	WPHDA member: \$250/person Non-member: \$275/person
Seminar Location	Hilton Garden Inn, 714 Pratt Drive, Indiana, PA 15705
Until Tuesday, September 21 , a group rate of \$94/night plus taxes is available for October 5-6 at the hotel, by calling 724-349-2222.	

Questions? Contact Julie Kascal at events@wphda.org or 412-661-0591.



AGENDA: Procurement: HUD and State Requirements

Wednesday, October 6

Registration: 8:00 a.m. Seminar: 8:30 a.m. - 5:00 p.m. Lunch: 12:00 - 1:00 p.m.

SEMINAR TOPICS

Reason for Procurement Rules: Federal and Pennsylvania law

Wage Rate Rules: Davis/Bacon and HUD-determined

Covered entities always follow the stricter law
What do federal rules require?
What do Pennsylvania rules require?
Procurement hierarchy

Required HUD forms

Bonding

The OMB Super Circular
HUD Procurement Handbook
Pennsylvania Statutes, Title 62: Procurement
Procurements using both federal and non-federal funds

Contract Administration
Internal Controls

Writing good specifications

Appeals, claims and remedies

Procurement and the Office of the Inspector General

Assistance to MBEs, WBEs, small businesses, Section 3

Types of Procurements:

Ethics in Procurement

1. Petty Cash
2. Micro procurements
3. Small procurements
4. Construction sealed bidding
5. Competitive proposals using RFPs
6. Qualification-based procurement of architects and engineers
7. Sole source/non-competitive procurements
8. Emergency procurement

Procurement Planning and Budgeting

The Contracting Officer

Procedural Steps for each type of procurement

Blanket Contracts

Cost and Price Analysis

Tracking Encumbrances

Change Orders

Cancelling Solicitations

Ranking and Rating Proposals

Contractor Qualifications

Avoiding Procurement Problems

Non-responsible Contractor

Procurement tips

Difference between a *Responsive* bid and a *responsible* Bid

Questions?

Illegal Contract Types

How to reach the Instructor with other questions – the ones you think of in the middle of the night

Multi-year contracts