

## **Jewish Community Housing Corporation**

### **Procurement Protocol**

The purpose of this protocol is to ensure that the Jewish Community Housing Corporation has a procurement system that:

- Is grounded in quality and integrity;
- Provides for the fair and equitable treatment of all person or firms involved in the JCHC's purchasing process;
- Ensures that supplies and services, including construction, are procured efficiently, effectively and at prices most favorable to the JCHC;
- Produces results that meet or exceed the JCHC's budgetary requirements.

All Jewish Community Housing Corporation staff shall follow the Corporate Compliance Policy and Procedure, which includes conflict of interest and undue influence in bidding and contracting for services for any of the communities.

#### *I. General Provisions*

##### Petty Cash Purchases:

Purchases under \$300.00 may be handled through the use of petty cash accounts or through established credit cards or business accounts. JCHC employees who may approve petty cash expenditures include: the Site Manager, the Facilities Director and the COO.

##### Form of Solicitation

Requests for Proposals and/or Scope of Work forms with time frame for submission of bids will be generated by the Regional Facility Director. This form will clearly indicate the importance and relevance of each of the evaluation factors as well as any sub factors and price. The Regional Facilities Director will identify appropriate vendor candidates.

##### Noncompetitive Proposals:

Procurement of goods and services by non competitive proposals may be used only when the amount of the planned project is under \$2,000.00.

##### Competitive Proposals:

For all planned projects of \$3,000 or more, the Regional Facilities Director will devise a Scope of Work/Request for Proposals and disseminate to each vendor. Additionally, if merited, the Regional Facilities Director will provide a walk through of the specific project. Three (3) proposals (estimates) will be provided for all Capital Projects and /or all operational projects that are over \$2,000.00.

If necessary, the Regional Facilities Director will conduct a cost analysis consistent with federal guidelines to ensure that the price paid is reasonable.

The initial evaluation of proposals (estimates) shall be conducted by Regional Facilities Director initially. The Regional Facilities Director will prepare the top three estimates, with written recommendation of vendor who meets the needs in regards to pricing, quality of service, and other factors that may play a part in the selection process, to the Chief Operating Officer. The Chief Executive Officer shall review all projects where any bid is in excess of \$5,000.00.

#### Negotiations

Negotiations shall be conducted with all vendors who submit a proposal determined to have a reasonable change of being selected for award, unless it is determined by the Regional Facility Director that negotiations are not needed with any of the vendors.

These vendors shall be treated fairly and equally with respect to any opportunity for negotiations and revision of their proposals. No vendor shall be given any information about any other vendor's proposal.

#### Award

After evaluation of the revised proposal, the contract shall be award to the responsible firm whose technical approach to the project, qualifications, price and any or all factors considered are most advantageous to JCHC provided that the price is within the maximum total project budgeted for that amount established for the specific property or activity. Prior to the commencement of work, an contract or estimate shall be signed by the Regional Facilities Director and the Chief Operating Officer for any project under \$5,000. Any project over \$10,000 shall also be approved by the Chief Executive Officer.

## *II. Contractor Qualification and Duties*

Contractor's responsibilities must:

1. Have adequate financial resources (ie, 60 days of operating capital on hand) to perform the contract; or the ability to obtain them;
2. Be able to comply with the required delivery or performance schedule taking into consideration all the vendor existing commitments;
3. Have a satisfactory performance record;
4. Have a satisfactory record of integrity and business ethics;
5. Have the necessary organization, experience, accounting and operational controls and technical skills or the ability to obtain;
6. Have the necessary production, construction and technical equipment and facilities or the ability to obtain them, and;
7. Be otherwise qualified and eligible to receive under applicable laws and regulations including not be suspended, disbarred or under HUD imposed Limited Denial of Participation.

8.18.09

