

Village of Hartwick Operating Procedures  
Bidding Process

Version 3.0

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**Section I – Definitions**

VOH – Village of Hartwick Resident Association

Residents – Homeowner

Board – Board of Directors of Village of Hartwick Resident Association

Executive Committee – Refers to the officers of Hartwick Village Resident Association that includes the President, Vice President and Secretary/Treasurer

Committee Chairperson – Usually a Board Member assigned to head a specific committee

Project Champion – Person who has primary responsibility for a project. Often this will be the Committee Chairperson

Property Manager – Refers to Cornerstone Property Management

Vendor – Supplier, Company or individual who may bid or deliver a service or product or project

**Section II – Overview**

This document defines the Process for obtaining and awarding bids for work to be completed in VOH. This applies to all bids for work whether being paid for from Capital fund or General operating fund.

**Section III – Benefits**

1. Enables comparison of bids.
2. Allow and promotes competitive bidding.
3. Fairness and equal chance to bid.
4. Allows for selection of the most fitting Vendor.
5. Offers transparency that ensures and removes the perception of any favoritism.

**Section IV – Preparing the Request for Bid**

Property Manager will assist in preparing the bid request based on input from the Board, Executive Committee, Committee Chairperson, or Project Champion. All bids requests will contain a minimum of the following information.

1. Detailed scope of work
2. State that bidder may provide drawings or plans, if appropriate.
3. Deadline for Bid submission.
4. Statement that Proof of Liability and Workmen Compensation Insurance will be provided if awarded contract.
5. Statement that contractors, sub-contractors, suppliers and vendors are in compliance with all US immigration laws and that company is an equal opportunity employer following EEO guidelines.
6. Requirements for Bid responses will include:
  - a. Itemized cost of material and labor

- b. Any warranty on either material or labor
- c. Various options, if applicable on materials
- d. Provide payment terms
- e. Provide at least three recent references for similar scope of work
- f. Provide estimated time they can start and total elapsed time until job is complete.

**Section V - Requesting Bids for Projects estimated to exceed \$500**

Cornerstone Properties will assist in acquiring bids by following the guidelines below.

- 1. Prepare Bid request as stated in Section IV above.
- 2. Identify 3 parties that may bid a project. Cornerstone Properties may ask for assistance in identifying companies from their resources or experience with other managed properties.
- 3. Qualify the Vendor to ensure they are interested in providing a bid.
- 4. The same bid request will be given to all Vendors
- 5. All bids will be distributed to all Vendors on the same day

**Section VI – When 3 bids may not be required**

- 1. When there are extenuating circumstances or proprietary instances when the number of competitors are very limited, such as Cable TV Service.
- 2. Projects/Work/Supplies under \$500 will not require a formal bid. Cornerstone Properties will know the agreed upon price before procurement of work/purchase and notify the Executive Committee of the planed expense and Vendor name. Upon completion of work the final invoice will be handled per the Accounts Payable process.

**Section VI – Receipt and Review of Submitted Bids**

Upon Receipt of Bid Cornerstone Properties will take the following actions

- 1. Review the bids received to ensure compliance with the Bid request. If any information is missing follow up with the bidder to determine if they want to provide the missing information or be eliminated as a bidder.
- 2. Check with the BBB to determine the Bidder’s BBB rating and write it on the bid request. If there is no record at BBB make that note on the Bid.
- 3. Forward the Bids (electronic version is preferred) to the Project Champion for review and consideration.
- 4. The Project Champion will review the Bids and when appropriate review with the other committee members.
  - a. If the Project Champion has any questions regarding the Bid they will contact the Bidder directly.
  - b. Once reviewed the Project Champion with committee input will decide on preferred bid and rank all bids from best to worst.
  - c. The Project Manager will then prepare the recommendation for Board Approval.
- 5. The Project Champion will notify the President that they have a Bid recommendation that will be presented to the Board.

**Section VII – Approval of Bids**

Once the Project Champion notifies the President that a bid needs to be reviewed and approved the President will do one of the following:

- 1. Place on agenda for next scheduled Board Meeting

2. Call a Special Board Meeting

If the Bid is approved by the Board the Project Champion will notify Cornerstone Properties which vendor has been selected who in turn will notify the vendor.

### **Section VIII – Execution and Completing the Project**

The Project Champion will coordinate with Cornerstone Properties to launch the project ensuring project is completed as planned.

1. The Project Champion will
  1. Ensure project is started on time and monitor the progress, ensuring work is being completed as planned
  2. Make the Executive committee aware of any problems or delays
  3. For large projects pictures should be taken before and after completion
  4. Once project is satisfactorily completed the Project Champion will notify Cornerstone Properties that payment can be made.
2. Cornerstone Properties will
  1. Coordinate all Project Activity with the Project Champion
  2. Once notified by Project Champion that work is complete will pay the Invoice following the Account Payable Process
  3. Any discrepancy in the Invoice that does not comply with the bid will be immediately escalated to the Project Champion.