

## Lantana Procedure

**Approved Date:** March 21, 2016

**Revision Number:** Original

**Table of Contents Number:** 3c

**Title:** Procurement Cycle from Receipt of Bids to Contract Award

**Purpose:** The intent of this procedure is to define the Lantana Association procurement cycle from the receipt of bids to contract award. The following items are included in this procedure:

1. What is the process to solicit bids?
2. What is the process once bids are received?
3. What is the process to make contract award?

### **Procedure:**

#### **1. What is the process to solicit bids?**

The CAM is contractually responsible to coordinate every step of the bid process. Specifically they “solicit, analyze and negotiate contracts for services related to the operation, maintenance, upkeep, repair, replacement and preservation of common elements.”

Generally speaking, Lantana Association develops the specs and/or RFP and then hands over the procurement effort to the CAM. The Association can suggest potential bidders based on prior experiences, references or some other means. Ultimately though, the Association relies on the management company’s network of vendors and the CAM’s experience to identify to identify the appropriate number of qualified bidders as outlined in Procurement procedure 3a – “Procurement Cycle thru the Solicitation of Bids.”

#### **2. What is the process once bids are received?**

The CAM is responsible to receive the bids, analyze them and present to the board. It may be necessary for the CAM to present a “side by side” analysis that summarizes major points of the bids to help the board understand bid differences and comparisons.

The CAM may disseminate information via email but the subsequent board vote to award a contract must take place at a board meeting. Upon receiving the bid debrief from the CAM, the board can decide to vote to select a vendor or ask the CAM for additional or clarifying information.

### **3. What is the process to make contract award?**

After the board selects a vendor during the board meeting and has an accurate and complete proposal in hand, two board members, as defined by procedure 1a - "Board of Directors Job Descriptions", sign the contract. The CAM notifies the vendor of the award and sends them the approved contract. The CAM also verifies the approximate start and completion date and works with the vendor to initiate down payment if required.

#### **Glossary of Terms:**

CAM	Community Area Manager
RFP	Request for Proposal