



Resident Engagement Department

TIP SHEET: TRAVEL, PROFESSIONAL SERVICES, AND FUNDRAISING

TRAVEL

HUD PIH Notice 2013-21 provides Public Housing Authorities (PHA) and Resident Councils (RC) with guidance regarding out-of-town travel. When a Tenant Participation (TP) activity is not taking place locally, the RC must provide a compelling reason for the activity to take place outside of the PHA's jurisdiction.

When planning out-of-town travel, the RC must consider the following factors:

- **Availability of local, free and low-cost training resources**
RCs utilizing consultants and trainers that are local to the region are expected to conduct training, retreats and other activities locally. If the proposed activity requires out-of-town travel, the RC must provide a justification.
- **Cost relative to the numbers of residents served and TP funds available**
TP funds should be maximized to improve quality of life for the greatest number of residents served by the PHA. RCs proposing out-of-town travel must consider the cost per participant relative to their overall budget and number of residents at their development.
- **Resident access to the resources provided**
The RC must have a documented outreach and selection process that ensures residents have **equal and broad access** to participate in the out-of-town activity. If the RC utilizes certain criteria for selection, this should be well publicized to the RC membership and resident population. Priority should be given to those residents and RC members who have **not** participated in previous trips organized by the RC.

Because Tenant Participation Funds are provided by HUD, which is a federal agency, Resident Councils must comply with federal rules when they expend TP Funds. These rules are set forth in 2 C.F.R. 200. RCs should refer to page 27 of their TPA guidebook to ensure the appropriate steps when contracting professional services.

PROCURING PROFESSIONAL SERVICES

As outlined in the guidebook, after obtaining an Independent Cost Estimate (ICE), an RC can obtain one written bid from a qualified vendor for purchases below the micro-purchase threshold. Pursuant to 2 CFR Section 200.320, non-Federal entities must, to the extent practicable, distribute micro-purchases equitably among qualified vendors. RCs must take steps to **diversify their vendors** and ensure **costs are fair and reasonable**.

For contracts over the micro-purchase threshold and under \$150,000, the RC must obtain three written bids when soliciting services. Pursuant to 2 CFR Section 200.320, requests for proposals must be publicized and identify all evaluation factors and their relative importance. Any response to publicized requests for proposals must be **considered to the maximum extent practical**. Additionally, RCs should be diligent when completing proposal review and ensure there are no conflicts of interest and ensuring proposal evaluators are especially careful to make the evaluations as thorough, objective, and well documented as possible.

Contracts over \$150,000 must be advertised in the City Record. NYCHA will work with the RC to advertise requests for proposals.

FUNDRAISING

NYCHA may disapprove proposals based on procurement irregularities and/or lack of proper supporting documentation.

HUD PIH Notice 2013-21 prohibits "...organized fundraising costs, including financial campaigns, solicitation of gifts and bequests, and similar expenses incurred to raise capital or obtain contributions, regardless of the purpose for which the funds will be used."

Based on this guidance, proposals for grant writing services, scholarship campaigns, and other organized fundraising activities are **not eligible**. However, the RC may utilize funds to participate in workshops and educational programs that provide instruction on fundraising and support overall capacity building.

The information within this "TIP Sheet" is meant to supplement the TPA guidebook and training received by the RC. RC's should reach out to their assigned Resident Engagement Coordinator for technical assistance or to arrange additional training on the topics outlined above.

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