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Health and Human
Services

HHSC M&C Facility Training

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Course Outline

- Procurement and Contracting (PCS) Staff
- Maintenance & Construction (M&C) Staff
- Statewide Procurement Program Overview
 - What is the Statewide Procurement Division at the Comptroller's Office?
 - What is an NIGP Code?
 - What is the CMBL?
- Know your Procurement \$ Thresholds
- Know your Procurement Methods/Choices
- Solicitation Methods
- What is 'Best Value'?
- Historically Underutilized Business (HUB) Program
- Obtaining Budgetary Quotes

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Health & Specialty Care System - Program Mission



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*"Providing Texans with high quality
and individualized care"*



Statewide Procurement Overview

- Statewide Procurement Statute: Texas Government Code (TGC)
 - §2155, §2156, §2157, §2158, §2269
- Statewide Procurement Rule: Texas Administrative Code (TAC)
 - Title 34, Part 1, Chapter 20
- Statewide Procurement Manual and Contract Management Guide
 - <https://comptroller.texas.gov/purchasing/publications/>



Statewide Procurement Overview

Procurement for the State of Texas is overseen by the Comptroller of Public Accounts Statewide Procurement Division*:

<https://comptroller.texas.gov/purchasing/>

This is the homepage of the Statewide Procurement Division.

This page accesses statewide contracts, statewide bidders lists, the statewide Historically Underutilized Business (HUB) program, access to the State of Texas approved open market posting website, and other useful tools to source your goods and/or services.

This site also houses the State of Texas Procurement and Contract Management Guide.

**This website is best utilized using Google Chrome as your web browser*



Statewide Procurement Overview

What is the first step I should take towards finding a source or vendor for a quote?

- Locate the National Institute of Governmental Purchasing (NIGP) Commodity Code assigned for the item and/or service:

<https://www.comptroller.texas.gov/purchasing/nigp/>

- Example:
 - 031-67 HVAC Parts and Accessories
(Commodities, or 'goods', are 005-899)
 - 208-90 Computer Software
 - 910-14 Door Installation, Maint & Repair (Metal)
(Services start in the 900's)
- The three-digit 'Class' is a broad category
- The two-digit 'Item' is more specific to the Class broad category



Statewide Procurement Overview

- **Why is this important to me?**
 - **CLUE – PROCUREMENT METHOD AND VENDOR LIST**
 - This is your first clue as to where to look for an approved source to obtain your desired item.
 - For example, Term Contracts, a required state approved purchase method, are organized by Class/Item code.
 - The Centralized Master Bidders List (CMBL) contains a list of vendors, including HUB's, registered by Class/Item code.
 - For Open Market procurements, certain dollar thresholds require state agencies to utilize the CMBL in the procurement process.
 - The CMBL can be a resource to locate vendors in your area for spot, informal, and budgetary quotes.



Statewide Procurement Overview

- **Centralized Master Bidders List**
 - The CMBL is the state of Texas official 'bidders list'
 - Vendors pay to be on this list (\$70.00/yr)
 - Vendors register by NIGP Class/Item Code
 - For Open Market procurements, certain \$ thresholds require use of the CMBL, which includes obtaining minimum HUB quotes

- **How do I access the CMBL?**
 - Also from the CPA Statewide Procurement Division website
 - <https://mycpa.cpa.state.tx.us/tpasscmbllsearch/index.jsp>
 - Search by Class/Item code; VID#; and/or Vendor Name

Procurement Dollar Thresholds



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- **Spot Purchase helpful tips**

\$0.00 - \$5,000.00

- Promote Competition
 - Use of the CMBL, although not required, is encouraged as opposed to using the same vendor over and over again. At least obtain competitive quotes occasionally to gauge your 'go-to' vendor's pricing.
 - Vendors, including HUB's, are ready to respond to quotes
 - Always obtain a hard copy quote/bid and attach this documentation to the requisition
- Hard copy quote should contain the following:
 - Description of services
 - Breakdown of material and labor – **no flat fee**
 - Hourly labor rate with estimated number of hours
 - Any discounts should be reflected after 'standard' or 'list'
 - No taxes

Procurement Dollar Thresholds



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- **Informal Purchase helpful tips**

\$5,000.01 - \$25,000.00

- Prepare a 'Scope of Work' for the item or service you require, and should include, at a minimum:
 - Description of items along with manufacturer part number and spec sheet
 - Description of services – services Scope of Work development on the next few slides
 - Anticipated term
 - Is there a site walk through required or recommended
 - Insurance requirements – standard or additional?
- If you choose to provide a budgetary quote, follow the Budgetary Quote Guidelines at the end of this training
- Attach your Scope of Work to the requisition
- Procurement will work with you to refine your Scope of Work
- Procurement will obtain the required bids from the CMBL, with input from the end user regarding additional vendors to quote
- After the informal bid period and the bids have been received (typically 5-10 days), Procurement will tabulate the bids and send to you for approval and award.

Procurement Dollar Thresholds



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- **Formal Purchase helpful tips** **\$25,000.01 and up**
 - Statutory posting requirements
 - Minimum 14 day posting: all solicitation documents posted on day one; no addenda
 - Minimum 21-day posting: when there are addenda that address technical clarifications
 - Construction and complex services solicitations can be 30 days or more
 - PCS must always facilitate

Procurement Dollar Thresholds



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- **\$100,000.00**
 - Requires the solicitation to include a HUB Subcontracting Plan (HSP); and requires a completed HSP from anyone submitting a solicitation response. Each HSP must demonstrate evidence of Good Faith Effort (GFE) in developing the plan. Traditional GFE requires respondent to properly notify at least three (3) HUB businesses, and at least (2) minority/women trade organizations or development centers of the subcontracting opportunities, with a seven (7) working day time for response. In addition, GFE shall be shown with any instructions or directions as specified in the HUB subcontracting plan template.
 - In making an HSP determination, consider the total expected contract value, **including the initial term and any renewal options**. if the total is expected to exceed \$100,000K, then an HSP is required.
 - DIR contracts already have an HSP on file; if the DIR vendor is going to subcontract from a vendor not listed on the DIR-filed HSP, then the vendor must receive permission from DIR to revise the HSP, and the revised HSP must be posted to the DIR contract/webpage prior to order placement.
 - While developing the solicitation, you, as a Contract Manager, may be requested to review and/or suggest possible subcontracting opportunities.

Procurement Dollar Thresholds



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- **\$5,000,000.00**
 - Requires POD review and delegation.
 - 'POD' is an acronym for 'Procurement Oversight & Delegation'.
 - Once the Scope of Work and Solicitation are fully developed, PCS must submit the solicitation and all supporting documentation through the CPA SPD webportal for POD review.
 - Typically, POD is reviewing for conformance to state required contract terms and conditions; minimal technical review.
 - POD has up to thirty (30) days to review an agency submittal.
 - POD will not review a solicitation after it has been posted on the Texas Marketplace (ESBD).



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Procurement Methods & Choices

- **Surplus Property**
 - Anything valued at less than \$200.00 is free to State employees for State use
 - Search by Location
 - Inventories on line
 - <http://portal.tfc.state.tx.us/surplus/state/>
 - There is a form that must be completed for HHSC Property Management in order to approve, transfer, and deliver your surplus furniture selection
 - Director, Facility and Warehouse Services: Seth Stallings 512-4246553
 - TFC Surplus Property Director: Kristy Fierro 512-463-3458
- **Procurement 'Set-Asides'**
 - **WorkQuest (formerly Texas Industries for the Blind & Handicapped - TIBH)**
 - HRC 122 / TGC 2155.441 / TAC 20.38
 - <https://workquesttx.com/>
 - **Texas Correctional Industries (TCI)**
 - TGC 497.024 / TGC 2155.065 / TAC 20.43
 - <http://www.tci.tdcj.state.tx.us/>



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Procurement Methods & Choices

Purchase Methods not subject to \$ thresholds:

- **Term Contracts and TXMAS Contracts**
 - Term Contracts: These are commodities and services that have been publicly solicited and awarded by the Statewide Procurement Division.
 - All state agencies are required to use term contracts whenever possible if the product or service meets their requirements.
 - TXMAS Contracts (Texas Multiple Award Schedule): These are commodities and services that been competitively awarded by the federal government (usually GSA), state cooperative agreement, or another state government agency
 - All state agencies have the option to use TXMAS Contracts if the product or service meets their requirements.
- You may search Term and TXMAS Contracts via the TxSmartBuy website:
 - <http://www.txsmartbuy.com>
 - You can search by Keyword, Part Number, or NIGP Class/Item Code



Procurement Methods & Choices

- TxSmartBuy – Search Tips

- Before searching in TxSmartBuy, research the item(s) that are needed
- Use websites of vendors specific to the product needed to get part numbers and specifics
- Look up NIGP Codes
- Use the filters on the left
- Use 'unique' keywords to narrow your searches
- Export search results to Excel to sort your results
- If item description is vague and you need help with selecting the right item, do not be afraid to contact the vendor for assistance
- As always, if you need assistance, ask Procurement



Procurement Methods & Choices

- TXMAS (Texas Multiple Award Schedule)
 - The TXMAS contracts can also be searched from the CPA website:
 - By TXMAS Schedule: <http://www.txsmartbuy.com/contractsearch>
 - Using search fields such as Contract Number, Contractor/Dealer, Contract Category, GSA Schedule, Keyword, or VID
 - Once you locate a contract, click on the TXMAS contract number to go to the TXMAS contract details:
 - The initial page is an introductory page that details the general terms and conditions of the contract
 - At the top of the page is a link to items available on contract
 - If the goods and/or services you desire are not listed on this contract link, then what you desire is not TXMAS eligible.
 - Determine if item description, cost, and lead time fit your needs.



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Procurement Methods & Choices

- TXMAS (Texas Multiple Award Schedule)
 - Pricing quoted should be equal to or less than the pricing listed on the TXMAS contract.
 - Pricing should coincide with the on-line TXMAS catalog or contract pricing
 - Incidental, off contract items may be purchased as 'Open Market', however the ratio cannot be less than 50/50, and cannot total more than \$5K without approval from the Statewide Procurement Division (PCS will obtain approval).
 - Negotiation is allowed
 - TXMAS Program Manager: Brian Haught
 - Brian.haught@cpa.texas.org



Procurement Methods & Choices

- Department of Information Resources (DIR) 'Cooperative Contracts'
- These are contracts and awards for Information Systems (IS) hardware, software, staffing services, maintenance, managed services, technology training, DBITS, and other products/services with high customer demand
 - The contracts can be searched from the DIR website at: <http://dir.texas.gov/>
 - Click on 'All Contracts and Services' link at the top
 - Search by Category, Vendor Name, Contract Number, Brand, or by Class/Item Code
 - Once you locate the contract you want, click on the link to take you to the contract details
 - Links to the contract, terms, pricing, and HUB plan are listed on each contract page
 - If under \$50K, you are not required to obtain competitive quotes from other DIR vendors, however you are welcome to do so to demonstrate 'best value'



Procurement Methods & Choices

- Department of Information Resources (DIR) 'Cooperative Contracts'
 - DIR quotes must contain the following:
 - DIR Contract Number
 - Pricing should coincide with the DIR contract pricing, usually listed in the Appendix C – Pricing List:
 - Include part numbers
 - If DIR contract pricing is structured as '% discount from list' or 'MSRP', then the quote should reflect the 'List' or 'MSRP' price, the applicable DIR % discount, and resulting price
 - Negotiation is allowed
 - All DIR contracts have an officially filed HUB Subcontracting Plan (HSP)
 - If your goods/and or services from the DIR vendor involve subcontracting other than what is currently filed, the DIR vendor will have to revise the filed HSP with DIR prior to use of the contract



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Procurement Methods & Choices

- DIR and TXMAS Quoting
 - If the DIR or TxMAS item or service you are procuring is under \$50K, you may award directly to the vendor of your choice, as long as you feel the purchase is of a 'best value' determination
 - If the DIR or TXMAS item or service you are procuring is over **\$50K**:
 - Advertise to at least three (3) competing DIR or TXMAS vendors (if available)
 - If this is not done your requisition may be rejected and you may have to start the process over again
 - There are exceptions – check with Procurement.



Procurement Methods & Choices

- DIR – SB20 84(R) Requirements
 - If the DIR or TXMAS item or service you are procuring is over \$50K:
 - Advertise to at least two (3) competing DIR or TxMAS vendors (if available)
 - If this is not done, Procurement will do this for you.
 - If the DIR or TXMAS item or service you are procuring is over \$50K and up to \$150K:
 - Advertise to at least six (6) competing DIR or TXMAS vendors (if available)
 - If this is not done, Procurement will do this for you.
 - If the DIR or TXMAS item or service you are procuring is over \$1M:
 - Procurement will advertise to all eligible applicable TxMAS vendors
 - Procurement will do this for you.



Procurement Methods & Choices

- DIR – SB20 84(R) Requirements (con't)
 - Statement of Work Portal: DIR DBITS (services), Managed Services for IT, IT Security Services, Cloud Services, and Comprehensive Web Development procurements over \$50K that cannot be purchased from an existing DIR contract catalogue, the following are required:
 - The agency must submit a Statement of Work, from a DIR template, through the DIR portal for review and approval prior to posting.



Procurement Methods & Choices

- Proprietary Purchases
 - Texas Government Code Section §2155.067
 - Defined as: product that is proprietary to one vendor and do not permit an equivalent product to be supplied
 - Justification Form Required – PCS02 Form must be completed
 - For Formal procurements (>\$25K), is **NOT** exempt from the procurement solicitation process
 - Attach PCS02 Proprietary Justification Form and budgetary quote to the requisition



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Procurement Methods & Choices

- Emergency Purchases

- Defined by Texas Gov't Code Section §2155.137;
- Defined by Texas Administrative Code Rule §20.210;
- Rule §20.82 Delegated Purchases applies to your purchase;
- Further explained in the Procurement and Contract Management Guide;
- Emergencies occur as the result of unforeseeable circumstances and may require an immediate response to avert an actual or potential public threat. If a situation arises in which compliance with normal procurement practices is impractical or contrary to the public interest, an emergency purchase may be warranted to prevent a hazard to life, health, safety, welfare, property, or to avoid undue additional cost to the state.
- Emergencies are NOT defined as a potential lapse in funding, unless the case can be made that it would cost the state additional monies if not acted upon before the current biennium funds lapse. However, this is not a typically valid reason, which is typically attributed to poor planning.
- Justification form required, PCS01 Emergency Justification Form is generated by the program.
- For Formal procurements (>\$25K), the purchase is **NOT** exempt from the procurement solicitation process or the formal procurement requirements....however the minimum posting times do not apply.



Procurement Methods & Choices

- Internal Repairs

- Definition: When the extent of the repair cannot be reasonably determined until the equipment is disassembled and an analysis performed.
 - Example: Repair of an air conditioner or some other piece of equipment that quit working.
- Initial estimate must be below the 'spot purchase' \$ threshold of \$5,000.00
 - If not, then it is an Informal Purchase, and there are minimum bidding requirements
- The initial quote from the vendor must include the following:
 - Hourly labor rate
 - Estimate for repair
 - Any known component costs that may be required



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Procurement Methods & Choices

- Internal Repairs (cont.)
 - After the repair estimate is received, and you have the final cost of the repair, you will communicate to PCS for a purchase order change notice
 - The benefit of categorizing this as an 'Internal Repair' from the onset is that should the repair estimate be above the spot purchase limit of \$5K, there is an allowance to go ahead and approve the purchase order and purchase order change notice without obtaining competitive quotes.
 - There is a limit to the extent and allowance of the repair amount; PCS will discuss with the program.



Solicitation Methods

Invitation For Bid (IFB)

- Primarily used for the purchase of Goods
 - When there is a clearly defined specification, such as a part number
 - Very little ambiguity, if any, about what is expected to be delivered
- Also utilized in Emergency and Proprietary purchases
- Awarded to lowest bid amount
 - As there is little to no ambiguity as to what is expected to be delivered
- Contractor must meet the agency stated minimum qualifications, and demonstrate these minimum qualifications in their bid response
 - Once the defined minimum qualifications are demonstrated, you must consider all bidders equally qualified
- No Negotiation allowed
 - Two Exceptions:
 - Emergency Purchase
 - When there is only one bid response
- Bid Opening – Open to the Public
 - Names and all prices are read aloud

Solicitation Methods (cont)



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Request For Proposal (RFP)

- Primarily used for the purchase of Services, a combination of goods and services, or highly complex procurements
- The respondent is required to propose how the goods/services will be delivered
- The evaluation criteria is based upon a combination of factors (example):
 - Pricing 40 points
 - Qualifications 60 points
- Standardized Qualifications criteria, can vary from solicitation to solicitation:
 - Respondent's Ability to Provide Construction Services and Proposed Team's Relevant Experience 30 points
 - Respondent's Quality and Safety Program 5 points
 - Respondent's Financial Stability and Risk 10 points
 - Respondent's Proposed Methodology 15 points
- Process allows for an 'Interview', also known as an 'Oral Presentation', to clarify vendor's responses and to further evaluate the highest ranked respondents
- Awarded to the highest ranked respondent once evaluation/interview/oral presentation is completed
- 'Best and Final Offer' (BAFO) and Negotiation IS allowed
- RFP Opening – Open to the Public
 - TGC §2269 Construction - Names and all prices are read aloud; all others, names only

Solicitation Methods (cont)



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Request For Qualifications (RFQ)

- Primarily used for the purchase of Professional Services, as defined by Texas Gov't Code §2254.
- The respondent is required to demonstrate their qualifications for the services required.
- Standardized Qualifications criteria, can vary from solicitation to solicitation:
 - Respondent's Relevant Experience & Qualifications 60 points
 - Respondent's Methodology 25 points
 - Respondent's Quality Control & Safety Program 15 points
- Process allows for an 'Interview, also known as an 'Oral Presentation' ' to clarify vendor's responses and to further evaluate the highest ranked respondents.
- Awarded to the highest ranked respondent, based upon demonstrated qualifications, once evaluation/interview/oral presentation is completed.
- Negotiation IS allowed
 - This is where the agency negotiates a fee schedule for the project, as you cannot request fees in the initial response
- RFQ Opening – Open to the Public
 - Names of respondents only



Solicitation Methods (cont)

IFB	vs.	RFP	vs.	RFQ
<ul style="list-style-type: none">• Shorter overall time frame		Longer overall time frame		Longer overall time frame
<ul style="list-style-type: none">• Evaluated against specs / price		Evaluated against criteria		Evaluated against criteria qualifications only
<ul style="list-style-type: none">• Public Bid Opening – Names & Prices		Public Proposal Opening - Names only		Public Submittal Opening - Names only
<ul style="list-style-type: none">• Technical <u>clarifications</u> only		Interviews/Oral Presentations		Interviews/Oral Presentations
<ul style="list-style-type: none">• No Negotiation Allowed Two exceptions: emergency, and only one bid received		BAFO/Negotiation allowed		Negotiation allowed
<ul style="list-style-type: none">• Best Value = Low Bid		Best Value = Combo of Price & Qualifications, ranked		Best Value = reasonable and customary fee schedule negotiated with 'most qualified'



'Best Value' Standard

- You hear a lot about 'best value' in public procurement. What exactly is 'best value'?
- Believe it or not, there is a law (statute) that defines it: Texas Gov't Code 2155.074 'Best Value Standard for Purchase of Goods and Services'.



'Best Value' Statute §2155.074

'In determining the best value for the state, the purchase price and whether the goods or services meet specifications are the most important considerations. However, the comptroller or other state agency may, subject to Subsection (c) and Section 2155.075, consider other relevant factors, including:

- (1) installation costs;
- (2) life cycle costs;
- (3) the quality and reliability of the goods and services;
- (4) the delivery terms;
- (5) indicators of probable vendor performance under the contract such as past vendor performance, the vendor's financial resources and ability to perform, the vendor's experience or demonstrated capability and responsibility, and the vendor's ability to provide reliable maintenance agreements and support;
- (6) the cost of any employee training associated with a purchase;
- (7) the effect of a purchase on agency productivity;
- (8) the vendor's anticipated economic impact to the state or a subdivision of the state, including potential tax revenue and employment; and
- (9) other factors relevant to determining the best value for the state in the context of a particular purchase.'

'Best Value' Statute §2155.074

Determining 'Best Value' in your Program's Procurements

- PCS recognizes the using program is the technical subject matter expert on whether or not the quote is reasonable and customary
- When there is no competition ('spot' purchase, TXMAS, DIR, Proprietary), the following guidelines should be followed in order to make a 'best value' determination:
 - Scope of Work is detailed and acceptable to HHSC employee
 - Quoted hourly rate is usual and customary for the services requested
 - The number of labor hours are justified
 - Parts are itemized and separate from labor – **no flat fees allowed**
 - An analysis of the above in order to determine 'best value'



Historically Underutilized Business (HUB) Program



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- Supported by Texas Government Code Chapter §2155.505 and Texas Administrative Code Chapter Title 34, Part 1, Chapter §20, Subchapter's §20.14 – §20.28
- Requires state agencies to provide opportunity for HUBs to quote on goods and/or services for procurements above \$5,000.00, as well as subcontracts from prime vendors when the contract award will be above \$100K
- Link to Statewide HUB Program:
 - <http://www.window.state.tx.us/procurement/prog/hub/>
- Requirements to provide outreach and opportunity to HUBs for Open Market or 'on the street' procurements at the following \$ thresholds:

• \$5,000.01 - \$25,000.00	Informal Purchase	Min. 3 CMBL w/ 2 HUB's
• \$25,000.01 and above	Formal Purchase	Formal Notification to all applicable CMBL vendors including HUB's

Historically Underutilized Business (HUB) Program



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- Spot purchases and Informal purchases present opportunities to utilize a HUB vendor. To locate a HUB vendor when searching on the CMBL, select 'HUB's on CMBL' option at the top of the CMBL page.
- Formal Solicitations >\$100K: HUB Subcontracting Plan (HSP)
 - Requires the 'prime' respondent to provide opportunity to HUB's to quote on subcontracting performed under the contract.
 - The HSP is a material aspect of the contract.
 - The HSP must be reviewed and approved for compliance by the HHSC HUB Program
 - You must attach a HUB Determination Form PCS406 to the requisition.

Obtaining Budgetary Quotes

Review of Budgetary Quote Process Checklist

- Contact PCS Construction Team Purchaser for the current CMBL list applicable to your procurement
 - You may supplement with whomever you choose
- Send the same scope of work to all vendors, at the same time, and set a deadline for response
 - “no bid’ or no response fulfills the bidding requirement
 - If there is a ‘walk-through’, all vendors should be invited to be at the same walk-through at the same time
 - You should prearrange the walk-through with your selected bidders to insure all can attend. If all cannot attend, then change the schedule to a date when all can attend.
 - Walk through sign in sheet (for your protection)
- The bid notice should include a deadline for bid submission – or else you will never know when the bid is over
- The bid notice should include minimum insurance requirements – document provided
- Hard copy quote should contain the following:
 - Description of services
 - Breakdown of material and labor – no flat fee
 - Hourly labor rate with estimated number of hours
 - Any discounts should be reflected after ‘standard’ or ‘list’
 - No taxes
- Keep for your records:
 - Budgetary Quote Process Checklist
 - Budgetary quote template and email sent to the vendors,
 - CMBL list provided by PCS
 - Additional notification emails
 - Jobsite walkthrough sign in sheets
 - Any clarifications, addendums, or answers to questions
 - All quotes/bids received.
 - For no bids, on the jobsite walkthrough sign in sheet, make a note that there were ‘x’ number of no bids or no responses received.
 - You should never copy/paste another vendors bid or quote into a bid notice or the budgetary quote template





Budgetary Quote Process Checklist

-
- | | | |
|------|---|---------------------------|
| 1.0 | Contact PCS Complex Team Purchaser to obtain the applicable CMBL list | Provided by Procurement |
| 1.1 | Budgetary quote email notice must be sent to minimum three CMBL vendors; | |
| 1.2 | At least two CMBL vendors must be HUB's; | |
| 1.3 | All CMBL Vendors must be from same Class/Item code. | |
| 1.4 | Recommendation is to send the budgetary quote email notice to as many vendors as practicable. | |
| 1.5 | You may include additional vendors not on the CMBL, but send the email notice to all - at the same time | |
| 2.0 | Save the CMBL file sent to you from the PCS Purchaser for your records. | |
| 3.0 | You must use the Budgetary Quote Template for your budgetary quote process | Budgetary Quote Template |
| 3.1 | Copy the text from the budgetary quote template and paste it into your email notice. | |
| 3.2 | Edit the highlighted sections as appropriate to your project. | |
| 3.3 | Typically, allow three to five days for bidders to respond. | |
| 3.4 | Walkthrough(s) and questions submitted may affect this timeframe. | |
| 3.5 | If walkthroughs are offered, ensure that sufficient time is allowed for prospective bidders to plan to attend. | |
| 3.6 | If there is a walkthrough, all vendors should be invited to be at the same walkthrough at the same time. | |
| 3.7 | If walkthrough is MANDATORY, recommendation is to schedule two (2) walkthroughs. | |
| 3.8 | If walkthrough is OPTIONAL, schedule one (1) walkthrough. | |
| 3.9 | A "Jobsite Walkthrough Sign-In Sheet" is part of the Budgetary Quote Template. | Walkthrough Sign-In Sheet |
| 3.10 | Regardless of whether walkthrough is optional or mandatory, all attendees (includes HHSC M&C or facility staff) are required to sign in. Retain the sign-in sheet for your records. | |
| 3.11 | Remove yellow highlighting from edited text. | |
| 3.12 | Delete red text with green highlighting when editing is complete. | |
| 3.13 | Procurement will be happy to assist in editing or review prior to emailing. | |
| 3.14 | Email the prepared Budgetary Quote Template to the PCS Purchaser for final review | Email bid announcement |

Budgetary Quote Process Checklist (cont.)



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- 4.0 The email notice with the Budgetary Quote Template should be sent 'To' the selected vendors, 'CC' yourself, and include the following:
 - 4.1 All highlighted sections completed.
 - 4.2 Minimum insurance requirements attachment (services only)

- 5.0 Answers to submitted questions should be sent simultaneously to all vendors that you requested a budgetary quote from

- 6.0 Print the email notification list for your records; THE EMAIL MUST CONTAIN THE VENDOR EMAIL ADDRESSES - USE THE 'TO' FIELD

- 7.0 "No Bid" or no response fulfills the bidding requirement

- 8.0 Email copy of the bid/quote should contain the following:
 - 8.1 Description of services
 - 8.2 Breakdown of material and labor - no flat fee
 - 8.3 Hourly labor rate with estimated number of hours
 - 8.4 Any discounts should be reflected after 'standard' or 'list'
 - 8.5 No taxes

- 9.0 Attach the following documents to the purchase requisition:
 - 9.1 Budgetary Quote Template and attachments that were distributed.

 - 9.2 CMBL list that was provided by the PCS Purchaser.
 - 9.3 Notification e-mail.
 - 9.4 Walk through sign in sheet.
 - 9.5 Quotes/bids received and/or make a note that there were 'x' number of no bids or no responses.

 - 9.6 This checklist, to signify that you have followed the steps above.



Budgetary Quote Email Template

The Health & Human Services Commission (HHSC) Maintenance & Construction Division (M&C) is seeking budgetary quote/bids for description of services. Work shall be performed at building name and physical address, City, State, Zip Code.

This Invitation for Bids (IFB) includes the following attachments:

Attachment X – identify attachments (Drawings, Specs, Other...)

Attachment Y - Identify attachments (Drawings, Specs, Other...)

Attachment Z - Identify attachments (Drawings, Specs, Other...)

STATEMENT OF WORK: Provide all materials, equipment, labor, coordination and supervisory activities necessary to complete construction of the project as more fully described in **Attachment(s) X, Y, Z – identify attachment(s)**, which include specifications, drawings, and other contract documents prepared by HHSC M&C.

JOBSITE WALKTHROUGH: The **mandatory/optional** (choose “mandatory” or “optional”) jobsite walkthroughs are scheduled for:

<<<<<2 walkthroughs if **mandatory** – 1 walkthrough if **optional**>>>>>

Day, Month, Date, Year @ Time AM/PM

Day, Month, Date, Year @ Time AM/PM

The location of the jobsite walkthrough is:

Building Name

Physical Address

City, State, Zip

Room/Location

Budgetary Quote Email Template (cont)



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Attendance at one (1) of the two (2) scheduled jobsite walkthroughs is **mandatory**. Only those Respondents whose names and represented firm are on the jobsite walkthrough sign-in sheet shall be allowed to submit a response.

<<<<<If jobsite walkthroughs are **mandatory**, keep the text above and delete the text for optional walk-throughs below>>>>>

<<<<<If jobsite walkthroughs are **optional**, keep the text below and delete the text for mandatory walk-throughs above>>>>>

Attendance at the scheduled jobsite walkthrough is optional.

You will be met at meeting area by an HHSC M&C or facility representative and shown the affected jobsite. Please do not be late. Visitor parking is available at tell where attendees can park and what the process is for being at the facility.

COMPENSATION AND FEES: Responding bidders shall provide a project cost (detail as indicated below and add additional lines as necessary). **Bidders may not add qualifications, conditions or exceptions to the provided specifications.** Any such modifications will not be considered for evaluation, and may be cause for rejection of the bid, at the full and sole discretion of HHSC M&C.

Total Labor Cost: \$_____

Detail #1 per Contract

(example: journeyman painter x 4 hrs. @ \$45.00 per hr. = \$180.00)

Detail #2 per Contract

Etc., adding as many lines as necessary

Total Material Cost: \$_____

Detail #1 per Contract

(example: drywall - \$150.00 x 10% markup = \$165.00)

Detail #2 per Contract

Etc., adding as many lines as necessary

Total Project Cost (sum of Labor plus Material Cost): \$_____

Estimated Number of **Calendar** Days for Completion of Project: _____ days after receipt of Purchase Order

Budgetary Quote Email Template (cont)



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Estimated Number of **Calendar** Days for Completion of Project: _____ days after receipt of Purchase Order

SCHEDULE OF EVENTS: HHSC M&C or Facility Representative reserves the right to change the dates shown below.

<u>EVENT</u>	<u>DATE</u>
Issue IFB	Day, Month, Date, Year @ time AM/PM
Walkthrough #1	Day, Month, Date, Year @ time AM/PM
Walkthrough #2	Day, Month, Date, Year @ time AM/PM
Deadline for Submission of Questions	Day, Month, Date, Year @ time AM/PM
Deadline for Submission of Bids	Day, Month, Date, Year @ time AM/PM

INQUIRIES: All inquiries shall be submitted in writing to first/last name by e-mail to first.last@hhs.texas.gov by 12:00 PM, Central Time, **Day, Month, Date, Year (Monday, January 7, 2021)**.

DEADLINE FOR BID SUBMISSION: All bids must be received by HHSC point of contact by 3:00 PM, Central Time, **Day, Month, Date, Year (Monday, January 14, 2021)**. Late bids will not be accepted.

METHODS OF BID SUBMISSION: Bids shall be submitted to first/last name by e-mail to first.last@hhs.texas.gov

HHSC M&C FACILITY CONTACT: First/last name @ area code-phone number or e-mail: first.last@hhs.texas.gov.

Budgetary Quote Email Template (cont)



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BIDDER POINT OF CONTACT: Please provide name and contact information for an authorized representative of your firm.

Name of Firm: _____

Point of Contact: _____

Phone: _____

E-Mail: _____



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Jobsite Walkthrough Sign-In Sheet

Project/Bid Description:

Date of Jobsite Walkthrough:

Facility:

*Name of Firm: _____

*Name of Firm Representative: _____

*Email Address: _____

*Phone Number: _____

*HUB? Y/N: _____

**repeat as necessary to accommodate number of attendees.*