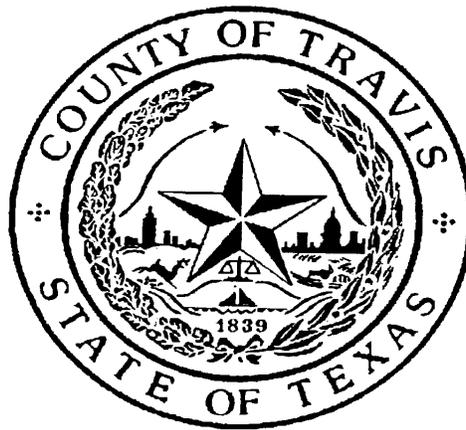


How to do Business with Travis County

Reference Manual



Office of the Travis County Purchasing Agent

**Travis County Purchasing Office
Administrative Building
700 Lavaca Street, Suite 800
Austin, Texas 78701
(512) 854-9700**

www.traviscountytexas.gov

Rev. June 2016

Travis County

Reference Manual



Cyd V. Grimes, C.P.M., CPPO
Purchasing Agent

Ms. Cyd V. Grimes, C.P.M., CPPO has been the Purchasing Agent for Travis County since 1992. As the Travis County Purchasing Agent, Ms. Grimes oversees the procurement processes for commodities, professional services, and construction. Her Office is also responsible for managing the county's Historically Underutilized Business (HUB) Program and accounting for and disposing of County property. Ms. Grimes is a past President and Legislative Chair for the Texas County Purchasing Association, and currently serves as the Legislative Chair for the Texas Public Purchasing Association (TxPPA.) Cyd also serves on the Board of the Texas Association of School Boards, Local Government Purchasing Cooperative and on the NPI Achievement in Excellence (AEP) Award Committee. She holds a Bachelor of Business Administration degree from Stephen F. Austin State University and is a Certified Purchasing Manager and Certified Public Purchasing Officer.

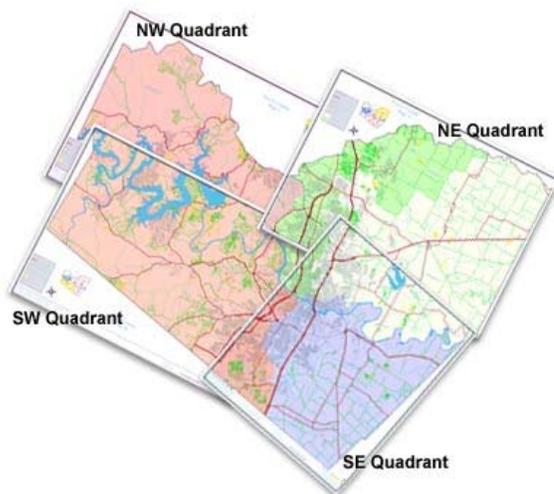


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Travis County Purchasing Office
Administrative Building
700 Lavaca, Suite 800
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Phone (512) 854-9700
Fax (512) 854-9185
www.traviscountytexas.gov

The purpose of this manual is to provide a guide to Travis County vendors on the basic fundamental steps in **"Doing Business With Travis County."**

MISSION...

The Travis County Purchasing Office is committed to:

- ◆ Ensuring compliance with the County Purchasing Act as well as other state and federal laws applying to Purchasing.
- ◆ Providing equal access to all vendors, including HUBs, participating through competitive acquisition of goods and services.
- ◆ Providing an ongoing supply of quality goods and services to all County offices.
- ◆ Accounting for all County assets through an effective fixed asset management system, and
- ◆ Protecting the interests of Travis County taxpayers without regard to any undue influence or political pressures.

GOALS OF PUBLIC PURCHASING...

Public purchasing has several goals including:

- ◆ purchasing the proper goods and services;
- ◆ obtaining the best possible price for the goods or services, without sacrificing the quality needed;
- ◆ ensuring goods and services are available where and when needed and there is a continuing supply available; and
- ◆ guarding against the misappropriation of assets that have been acquired through the procurement process.

ETHICS POLICY...

The Travis County Purchasing Office strictly adheres to ethical principles in that the conduct of every employee involved in the County procurement process must be legal, ethical, and defensible.

The following is adapted from the American Bar Association's 2000 Model Procurement Code for State and Local Governments:

- ◆ Public employment is a public trust. It is the policy of Travis County to promote the objective of protecting government integrity and the objective of facilitating the recruitment and retention of personnel needed by the County. Such policy is implemented by prescribing essential standards of ethical conduct without unnecessary obstacles to entering public service.
- ◆ Public employees must discharge their duties impartially so as to assure fair competitive access to County procurement by responsible contractors. Moreover, public employees should conduct themselves in such a manner that fosters public confidence in the integrity of the Travis County procurement process.
- ◆ To achieve the purpose of this policy, it is essential that those doing business with the Travis County Purchasing Office also observe the ethical standards prescribed in this policy.

Types of Commodities & Services Purchased

Travis County purchases a sizeable variety of goods and services. Below is a sampling of these goods and services:

-COMMODITIES-

<i>Office Supplies</i>	<i>Computer Hardware</i>	<i>Employee assistance programs, etc.)</i>
<i>Uniforms</i>	<i>Software</i>	<i>Plastic Containers</i>
<i>Temporary Employment Services</i>	<i>Paper Products</i>	<i>Floor Covering Material</i>
<i>Printing of Forms</i>	<i>Computer Cables</i>	<i>Building Material</i>
<i>Paper</i>	<i>Vehicle Parts & Accessories</i>	<i>HVAC</i>
<i>Surveillance Equipment</i>	<i>Playground Equipment</i>	<i>Publications</i>
<i>Fuel</i>	<i>Security Guard Services</i>	<i>Bathroom Accessories</i>
<i>Car Washing Services</i>	<i>Telephone Equipment</i>	<i>Plumbing Fixtures</i>
<i>Inmate Clothing</i>	<i>Printing Services</i>	<i>Classified Advertising</i>
<i>Wall Repair Services</i>	<i>Moving Services</i>	<i>Copier Rentals</i>
<i>Trap Rock</i>	<i>Road Materials</i>	<i>Surface Aggregates</i>
<i>High-Tech Equipment</i>	<i>Pest Control</i>	<i>Car Washing Services</i>
<i>Maintenance Contracts</i>	<i>Furniture</i>	<i>Records Storage</i>
<i>Maintenance of Hardware/Software</i>	<i>Modular Systems Furniture</i>	<i>Erosion Control</i>
<i>Software Licenses</i>	<i>Refuse Collection</i>	<i>Hardware Store Items</i>
<i>Communication Systems</i>	<i>Pharmaceuticals</i>	<i>Asphaltic Road Materials</i>
<i>Camera Systems</i>	<i>Helicopter Maintenance</i>	<i>Janitorial Services</i>
<i>Voting Equipment</i>	<i>Electronic Monitoring</i>	
	<i>Insurance (health, dental, life AD&D, workers comp.</i>	

-CONSTRUCTION-

Procurement and Administration of Architectural/Engineering Services
Procurement and Administration of Construction Contracts

-SERVICES-

Procurement and Administration of Professional Services for County Attorney, County Clerk, Criminal Court, Medical Examiner, Sheriff's Office, Auditor's Office, and City of Austin Interlocal
Development of Juvenile Probation Department Contracts

The Purchasing Office, as well as Officials, Executive Managers, and employees, provide an equitable and competitive access to the County procurement process to all responsible vendors.

Further, County procurement is conducted in a manner that promotes and fosters public confidence in the integrity of the County procurement process.

How to Do Business with Travis County



Thank you for visiting the Travis County Purchasing Office. Please expand your search by visiting Travis County's third-party procurement and bid notification system vendor, www.bidsync.com



There is **NO FEE** to register as a Travis County vendor, or to participate in the County's solicitation process. However, other government agencies using BidSync may pass that fee to the vendor. There will never be a fee with Travis County bids!



The Purchasing Agent is the chief procurement officer for Travis County. By statute, the Purchasing Agent is responsible to direct and oversee the County procurement process for all elected and appointed officials and commissioners court departments. Your Purchasing Office is the "single point of contact" for doing business with Travis County

Registration is Free

Select BidSync Links

Navigate to www.bidsync.com, select the BidSync Links™ icon for Suppliers, then select the "Register Now" button.

Your Information

Enter information for the Main Contact on the account, as well as your Company information.

Goods & Services

Select your primary industry and narrow down your results by specific keywords. Select where you do business and how you wish to receive notifications.

Thank you for registering with BidSync

Your information will be saved and your account will be activated with 24 hours. For quicker activation, please call Bid Sync directly at 1-800-990-9339, ext. 1.

For Additional Information:

BidSync Vendor Support
vendorsupport@bidsync.com
1-800-990-9339 Ext. 1
629 E. Quality Drive, Suite 101
American Fork, UT 84003

**Want to learn how to use BidSync
as a valuable research tool?
Flip over to learn more!**

Placing an Offer

Login to www.bidsync.com

Locate the bid to which you are responding.

- Click the "Search" tab on the top left page
- Enter keyword or bid number and click "Search"

Click on the "Bid Title/Description" to open the Bid Information Page.

View and Accept all documents in the document section.

Select "Place Offer" found at the bottom of the page.

Enter your pricing, notes, and upload attachments to this page.

Click "Submit" at the bottom of the page.

Review Offer(s)

Enter your password.

Your offer has been received!

Travis County Purchasing Office
700 Lavaca, Suite 800
Austin, Texas 78701

(512) 854-9700
(512) 854-9185 Fax

www.traviscountytx.gov/purchasing/default.asp

How to Do Business with Travis County

BidSync is a useful research tool for vendors!

As a registered user, you can locate bid tabs for previous bids:

Click on “**Bids**” on the gray menu bar, then click on “**History**”.

Use the “**Search**” function to find previous bids by typing in keywords or bid number.

Click on “**Bid Tabs**” to see winning vendor and contact information.

If a bid tabulation report is not available, please contact the Purchasing Office at (512) 854-9700 to request. You may also contact the **Point of Contact** listed in the bid description via e-mail or phone. Please have the bid number or title ready when you contact the office.

You can locate names of vendors who have viewed current bids:

Click on “**Bids**” on the gray menu bar, then click on “**Bids of Interest**” or,

Click on “**Search**” and enter information such as bid title or bid number.

In the first box with the bid number and title, look for Notifications to the right of the screen, then click on “**Report.**”

Vendor names and State location only will be listed. BidSync does not provide detailed contact information on open bids. You can copy the names and use any popular internet **Search Engine** to get their contact information. (NOTE: Some vendor names may be truncated.)

NOTE: For construction bids, other plan holders may be listed with other plan rooms. See the project specification book for a list of plan rooms.

BidSync benefits for Vendors:

Upon logging into BidSync, vendors are provided a list of all current bid requests for products or services in the self-selected classifications and geographical areas.

Vendors also have the option to receive notifications via e-mail whenever a public agency submits a bid or proposal for products or services, or makes a change in a previously sent request for a bid or proposal.

Vendor may submit questions and/or request additional clarification on bids or proposals, thus maintaining a fair and competitive solicitation process.

Vendors have the ability to attach photos, descriptive material, written documents, etc., in response to most bids.

BidSync provides **FREE** training during normal business hours by call 1-800-990-9339, Ext. 1.

Jan 2015 - JTG

Invoice/Payment Process

The general purchasing process as outlined below contains several stages with responsibilities that are often designated by statute. It begins with requirements planning and identification and culminates with the receipt of and payment for goods and services.

Step	Performed By:
Identify requirements and obtain budget	User Department (“Department”) <i>(Note: Purchasing Office may assist)</i>
Define/finalize requirements	Department and Purchasing Office
Submit electronic requisition outlining requirements to Purchasing	Department
Solicit, advertise, and generate Purchase Orders and Contracts from requisition and send to vendor	Purchasing
Deliver good/service as outlined in contract and submit invoice	Vendor
Receive good/service and verify completeness against contract	Department <i>(Note: Purchasing Office coordinates, especially for fixed assets)</i>
Electronically receive item in SAP system and submit original invoice to Auditor’s Office	Department
Match received amount with invoice and audit	Auditor
Submit payment claim to Commissioners Court for approval	Auditor
Approve payment of claim	Commissioners Court
Disburse payment of claim	County Treasurer

Prepayments and Advance Payments

Generally, prepayment is not authorized for any purchase of supplies, materials, equipment or services. Exceptions are:

- ◆ Library materials
- ◆ Merchandise purchased from federal and state agencies
- ◆ Realty rental
- ◆ Subscriptions
- ◆ Rental fee for meeting rooms
- ◆ Annual maintenance agreements for information technology
- ◆ Tuition to an institution of higher education
- ◆ Training and travel expenses per budget rules
- ◆ Other prepayments as authorized by the County Auditor

**HOW TO FILE AN ASSUMED NAME
IN TRAVIS COUNTY INFORMATION**

**DOING BUSINESS AS
(DBA)**



Dana DeBeauvoir Travis County Clerk

Mailing Address: P.O. Box 149325, Austin, Texas 78714-9325
Phone: (512) 854-9188
www.traviscountyclerk.org

Recording, Elections, Computer Resources, Accounting, and Administration Divisions 5501 Airport Boulevard, Austin, Texas 78751
Misdemeanor Records, Civil/Probate/Commissioners Court Minutes, and Records Management Divisions 1000 Guadalupe, Austin, Texas 78701

ASSUMED NAME CERTIFICATE FOR CERTAIN UNINCORPORATED PERSONS

ASSUMED NAME under which the business or professional service is or is to be conducted (print clearly):

PHYSICAL ADDRESS OF BUSINESS (print clearly):
Address
City State Zip Code

I hereby state that this registrant is:

- AN INDIVIDUAL. Below is my full name and residence address.
A PARTNERSHIP. Below is the name and office address of the venture or partnership; the full name of each joint venture or general partner; and each joint venturer's or general partner's office address, if the venture or partner is not an individual.
AN ESTATE. Below is the name and address (if any) of the estate; the full name of each representative of the estate; and each representative's residence address if the representative is an individual, or the representative's office address, if the representative is not an individual.
A REAL ESTATE INVESTMENT TRUST. Below is the name and address of the trust; the full name of each trustee manager; and each trustee manager's residence address, if the trustee manager is an individual, or the trustee manager's office address, if the trustee manager is not an individual.
COMPANY OTHER THAN A REAL ESTATE INVESTMENT TRUST. Below is the name and office address of the company. The state, country, or other jurisdiction under the laws of which this company was organized is

And further state that this registrant is not a limited partnership, limited liability company, limited liability partnership, or foreign filing entity.

Information required as listed above (print clearly):

Name Signature
Address
Name Signature
Address
Name Signature
Address

FOR USE BY NOTARY AND CLERK OF THE COURT, DEPUTY. The State of Texas and County of Travis:

Before me, the undersigned authority, on this day personally appeared:
known to me to be the person(s) whose name(s) is/are subscribed to the foregoing instrument and acknowledged to me that he/she/they signed the same purpose and consideration therein expressed. Given under my hand and seal of office, on

Signature of Notary Public in and for the State of Texas or Clerk of the Court, Deputy Seal of the Notary Public or Clerk of the Court, Deputy

INFORMATION WHERE DOCUMENT SHOULD BE RETURNED
(to be completed by applicant):
In the spaces below, clearly print the name, address, city, state, and zip code where this document should be returned

Form of identification presented:



Dana DeBeauvoir Travis County Clerk

Mailing Address: P.O. Box 149325, Austin, Texas 78714-9325
Phone: (512) 854-9188
www.traviscountyclerk.org

Recording, Elections, Computer Resources, Accounting, and Administration Divisions 5501 Airport Boulevard, Austin, Texas 78751
Misdemeanor Records, Civil/Probate/Commissioners Court Minutes, and Records Management Divisions 1000 Guadalupe, Austin, Texas 78701

ASSUMED NAME CERTIFICATE FOR INCORPORATED BUSINESS OR PROFESSION, LIMITED PARTNERSHIP, LIMITED LIABILITY PARTNERSHIP, LIMITED LIABILITY COMPANY, OR FOREIGN FILING ENTITY

A corporation, limited partnership, limited liability partnership, limited liability company, or foreign filing entity must file a certificate under this subchapter if the entity:
(1) regularly conducts business or renders professional services in this state under an assumed name; or
(2) is required by law to use an assumed name in this state to conduct business or render professional services.

ASSUMED NAME under which the business or professional service is or is to be conducted (print clearly):

PHYSICAL ADDRESS OF BUSINESS (print clearly):

Address: _____

City: _____ State: _____ Zip Code: _____

I hereby specify that this registrant is:

- A for-profit corporation, nonprofit corporation, professional corporation, professional association, or other type of corporation.
A limited partnership, limited liability partnership, or limited liability company.
Another type of incorporated business, professional or other association, or legal entity, foreign or domestic.

Registrant's name as stated in the registrant's certificate of formation or application filed with the office of the Secretary of State or other comparable document:

State, country, or other jurisdiction under the laws of which the registrant was incorporated or organized:

Period, not to exceed 10 years, during which the registrant will use the assumed name: _____

Street or mailing address of the registrant's principal office in this state or outside this state, as applicable:

County or counties in this state where the registrant is or will be conducting business or rendering professional services under the assumed name.

- All Counties
All Counties except: _____
Only the following Counties: _____

This certificate must be executed and acknowledged:

- (A) by each individual whose name is required to be stated in the certificate or the individual's representative or attorney-in-fact; and
(B) under oath on behalf of each person whose name is required to be stated in the certificate and who is not an individual, by: (1) the person's representative or attorney-in-fact; or (2) a joint venturer, general partner, trustee manager, officer, or other person having authority regarding the person comparable to the person's representative or attorney-in-fact. A certificate executed and acknowledged by an attorney-in-fact must include a statement that the attorney has been authorized in writing by the attorney's principal to execute and acknowledge the certificate.

Name _____ Signature _____

Name _____ Signature _____

Name _____ Signature _____

FOR USE BY NOTARY AND CLERK OF THE COURT, DEPUTY. The State of Texas and County of Travis:

*Before me, the undersigned authority, on this day personally appeared: _____
known to me to be the person(s) whose name(s) is/are subscribed to the foregoing instrument and acknowledged to me that he/she/they signed the
same purpose and consideration therein expressed. Given under my hand and seal of office, on _____*

Signature of Notary Public in and for the State of Texas or Clerk of the Court, Deputy Seal of the Notary Public or Clerk of the Court, Deputy

<p>INFORMATION WHERE DOCUMENT SHOULD BE RETURNED (to be completed by applicant): In the spaces below, clearly print the name, address, city, state, and zip code where this document should be returned</p> <p>_____</p> <p>_____</p> <p>_____</p>

Form of identification presented: _____

Helpful Hints

“Doing Business with Travis County”

Since the County’s Purchasing function is governed by Section 262 of the Texas Local Government Code, known more commonly as *The County Purchasing Act*, there are some unique aspects to County purchasing.

The foremost item of importance to remember is that the County Purchasing Office is the agency authorized to perform Purchasing on the County’s behalf. The County is not responsible for orders that are placed outside of the Purchasing Office.

Do

- ✓ Request and obtain a Purchase Order Number from the County prior to delivering items or performing services.
- ✓ Reference the Purchase Order Number on your invoice.
- ✓ Obtain a legible signature, the name and telephone number from the individual receiving the goods/services on behalf of the ordering department.
- ✓ Follow-up with user department staff to make sure items and services delivered have been received in the system.

Don't

- ✓ Accept verbal orders placed by an employee outside the Purchasing Office.
- ✓ Accept orders without a Purchase Order Number and/or Purchase Order (faxed by the Purchasing Office).
- ✓ Modify orders unless the Purchasing Office has issued an amendment to the Purchase Order.
- ✓ Invoice for items that have not been delivered.

HISTORICALLY UNDERUTILIZED BUSINESS (HUB) PROGRAM

Travis County does not certify HUB vendors. HUB vendors must complete the certification process with the State of Texas Comptroller of Public Accounts, the City of Austin, Texas Unified Certification Program or the South Central Texas Regional Certification Agency. The vendor must hold a current valid certification from one of these entities.

The policy of the Travis County Purchasing Office is to ensure a good faith effort is made to assist certified HUB vendors and contractors in receiving contracts in accordance with the HUB Program policies and the Minority and Woman-Owned Business (M/WBE) goals adopted by the Travis County Commissioners Court.

The HUB Program policies and Minority and Woman-Owned Business goals shall be applicable to the eligible procurement dollars spent in the following areas:

- ◆ Purchase of supplies, materials, products, services, and equipment.
- ◆ Maintenance or service of County assets and property
- ◆ Contracts for professional and non-professional services
- ◆ Contracts for commodities, equipment, supplies or materials
- ◆ Contracts for repair or alteration of real property
- ◆ Contracts for the construction of real property
- ◆ Contracts for the repair or construction of roads, bridges, or other related structures and surfaces.



HUB GOALS AND SUB-GOALS (Minority and Woman Business Enterprise)

HUB Category	Construction	Commodities	Professional Services	Services
Overall (MBE) Goal	13.7%	3.5%	15.8%	14.1%
Sub-Goals:				
African-American	1.7%	0.3%	1.9%	2.5%
Hispanic	9.7%	2.5%	9.0%	9.9%
Native/Asian American	2.3%	0.7%	4.9%	1.7%
Overall (WBE) Goal	13.8%	6.2%	15.8%	15.0%

Each buyer shall, to the maximum extent practical, ensure the HUB goals are met through the award of purchase orders and contracts, in each area defined above, to certified HUBs. This is achieved through a systematic approach of soliciting quotes, bids and proposals from certified HUBs.

For solicitations up to \$2,499, the Purchasing Office solicits a quote from a certified HUB, if possible. For a solicitation from \$2,500 to 24,999, the Purchasing Office requires at least three informal quotes, one of which must be from a certified HUB.

The Purchasing Office uses a third party vendor to maintain the Bidders List. All registered vendors within a specific commodity and sub-commodity category are solicited.

The Travis County Construction Plan Rooms are compiled of various trade and chamber organizations that have partnered with Travis County to receive construction plans and specifications at no cost.

CONSTRUCTION PLAN ROOMS	
AMTEK Planrooms & Engineering Reports 7801 N Lamar Blvd., Ste A137 Austin, TX 78752 phone (512) 323-0508 fax (512) 323-0920	Builders Exchange 4047 Nacoperrin Ste 100 San Antonio TX 78217 phone (210) 564-6900 fax (210) 564-6901
Associated General Contractors (AGC) Building Branch 609 South Lamar Austin, Tx. 78704 phone (512) 442-7887 fax (512) 442-3503	City of Austin - Business Solutions Center One Texas Center 505 Barton Springs Road, 1st Floor Austin, Tx. 78704 phone (512) 974-7781 fax (512) 974-9150
Associated General Contractors (AGC) Highway, Heavy, Utilities and Industrial Branch Division 300 Barton Springs Rd. Austin, Tx. 78704 phone (512) 478-4691 fax (512) 478-7936	City of Austin Construction & Technology Center 4201 Ed Bluestein Blvd., Ste. 2103 Austin, Tx. 78721 phone (512) 974-7620 fax (512) 974-7622
Austin Area Black Contractors Assoc. (ABCA) 6448 Hwy. 290 East, Ste. E-107 Austin, Tx. 78723 phone (512) 467-6894 email: brc-pro@att.net http://www.abcatx.com	CMD Group, LLC 30 Technology Pkwy South, Ste 100 Norcross, GA 30092 phone (800) 424-3996 fax (800) 303-8629
Austin Metropolitan United Black Contractors phone (512) 784-1891 <i>NOTE: Delivered to COA Construction & Tech Center</i>	U. S. Hispanic Contractors Assoc. de Austin 920 E Dean Keaton Austin, Tx. 78705 Phone: (512) 922-0507 Fax: (512) 374-1421 e-mail: info@ushca-austin.com http://www.ushca-austin.com
Asian Construction Trade Association (ACTA) 4201 Ed Bluestein Blvd., Ste. 2105 Austin, Tx. 78721 phone (512) 926-5400 fax (512) 926-5410 http://www.acta-austin.com	Whitley & Siddons PO Box 164047 Austin, TX 78716 phone (512) 477-9491 fax (512) 481-1983

Travis County Recognizes these certifications	
State of Texas	http://www.window.state.tx.us/procurement/prog/hub/
City of Austin	www.austintexas.gov/department/small-and-minority-business/about
Texas Unified Certification Program (TUCP) City of Austin certifies, request DBE form	http://austintexas.gov/department/disadvantaged-business-enterprise
South Central Texas Regional Certification Agency (SCTRCA)	http://www.sctrca.org/certifications.asp

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