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Purchasing Agent

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Travis County *Purchasing Quarterly*

In the Spotlight Matt Phillips

By Jorge Talavera

Nobody sees Travis County like Matt Phillips. Matt visits every department and is responsible for tracking virtually all the equipment the County purchases.

At 6'2" with a larger than life personality, and as the County's only Fixed Assets Associate, Matt is hard to miss traveling between departments across the County "taggin" furniture, computer equipment, and other county property.

"Huntin' things down," is his job and he approaches it as detective work. "It's like an investigation to find things," says Matt. "You have to know who to call and what questions to ask, then separate the good from the bad information. I've learned just about everybody will give you information, but good information is key. Otherwise you could be chasin' ghosts and you'll never get anything done."

With over forty departments and 4,000 employees in the County, Matt had his work cut out for him

when he came on board because he didn't know whom to call within departments to get that "good information." He learned quickly that the only way to get his job done was to ask the right questions of the right people. Then Matt takes what he needs from the answers he receives. "I might talk to 20 people and only get one sentence or word from each one. Then I just put the puzzle pieces together."



Capital items, or items valued over \$5,000, take priority because of their value and the vigilance of Fixed Assets and the Auditor's Office in ensuring that the item is tracked. Matt keys off of a "pending list" of assets, which contains the items that have been purchased, paid for and received. Matt then initiates the tracking of this item through its life cycle by traveling to the department to "tag" the item with an "asset tag number."

"I've got contacts. Everybody knows me now and I've got a good working rapport with 99% of the County." He also knows County

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County Adopts City of Austin Minority and Woman Owned Business Enterprise Goals

Since 1994, when Travis County's Historically Underutilized Business (HUB) Program was established, the County has had a 30 percent "across the board" HUB goal. This is no longer.

In the July 15, 2003, Commissioners Court Voting Session, the Court unanimously adopted the City of Austin's Minority and Woman Owned Business Enterprise (M/WBE) goals and sub-goals. The goals are starkly different from the County's original 30 percent goal because they are narrowly tailored and specific to ethnicity, gender and procurement category.

The intent of the Court, Purchasing, and the HUB Office is to more narrowly target areas needing improvement in terms of

actual contract awards. Construction will be most heavily targeted for improvement in the area of HUB subcontracting.

Where Prime contractors were previously asked to make a "Good Faith Effort" to subcontract with HUBs in general, the HUB Office now calls for Primes to use the adopted sub-goals as "a guideline to diversify their HUB subcontractor base."

Most of the Prime contractors who currently do business with the County are considered to be both compliant and cooperative with the County's HUB Program policies, procedures and purpose, according to the HUB Office and construction procurement personnel. But there will always be some resistance because of the nature of

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Buyer INSIGHT With contributors Loren Breland, Rose Garcia and Richard Villareal

How does the County use state term contracts? The State of Texas Building and Procurement Commission has competitively bid thousands of items and placed those items on state term contracts. Travis County takes advantage of these contracts by utilizing the already competitively bid pricing to eliminate the need to bid frequently procured items.

State term contracts are for the use of eligible State of Texas entities like Travis County and are not for personal purchase or purchase by commercial entities.

State term contracts streamline the process for the County's purchases of many commonly procured items such as televisions, ammunition, fax machines, lawn equipment, and thousands of other items. Although an item may be available through a state term contract, County purchases of items listed on a term contract are not

automatic. At times, county contracts more narrowly specified to departments' needs may be established for items already available through a state term contract. If a county and term contract cover the same items or services, the County contract takes precedence over the state term contract.

There are no special procedures required of departments to make a state term contract purchase. "When a department calls a buyer and says I need to buy this," says Rose Garcia, Purchasing Agent Assistant III, a senior commodities buyer, "we'll go to the state term contract listing on the Web to check the contract status and match specifications for the department." http://www.tbpc.state.tx.us/cat_page/ If the item or service is determined to be available on state term contract, a requisition may be issued by the department with the correct product or service specifications.



Once a requisition is received, the buyer reviews the requisition against the checklist for completeness and accuracy. The requisition is returned to the user department if the pricing or minimum quantity differs from term contract requirements. The adjusted requisition is then processed into a purchase order in H.T.E. and copies are distributed accordingly.

State term contract purchases over \$25,000 are not exempt from Commissioners Court approval. Considering state term contracts cover everything from fax machines to first aid supplies, there is no shortage of opportunities to use this valuable purchasing tool to eliminate unnecessary "legwork." ☺

Link up...to helpful purchasing information on the Web.

- www.tucp.org – Texas United Certification Program, "one-stop" certification process information and County recognized DBE directory
- buzzgate.org/tx_welcome.html – Business Utility Zone Gateway provides direct access to free, low-cost resources specifically targeted to help individuals start, grow and succeed in business.
- www.texasbusiness.com – current news, related small business information, press releases and links to business resource guides

Goals · Continued from Page 1

the program. With the recent Supreme Court ruling reversing the elimination of race as a factor in university admissions and other affirmative action programs, the topic tends to spark a lively discussion and passionate viewpoints.

The spirit of the HUB Program is to afford as many vendors and contractors the opportunity to do business with the County despite their size and owners' ethnicity or gender. However, vendors' HUB status is not the County's sole interest when soliciting quotes or bids. The bottom line in commodity or construction purchases is typically the "bottom line," and in other procurements such as professional services, price and HUB status are only considerations in determining the best overall value.

According to the HUB Office, "HUB status is an added value that allows us to more fairly redistribute tax dollars to the

business community. Adopting the city's goals is another initiative targeting the inclusion of small businesses in the procurement process. The Court recognizes that HUBs are the backbone of the local economy and business community."

Along with the new adopted goals, another major change has taken place with regard to recognized HUB certification. Capital Metro, previously one of the County's three recognized HUB certification agencies, no longer certifies

vendors as Disadvantaged Business Enterprises (DBEs).

The Texas United Certification Program (TUCP), a statewide initiative aimed at streamlining the certification process for vendors, assumed Capital Metro's certification function. As a result, TUCP's DBE certification will now be recognized. Although DBE is a federal certification, unlike the federal government, the County will still have no "set-asides" for any type of HUBs. ☺

Travis County HUB Goals	Construction	Commodities	Professional Services	Non-professional Services
African-American	2.6%	0.3%	1.1%	2.5%
Hispanic	20.4%	2.5%	5.9%	9.9%
Native/Asian-Amer.	0.8%	0.7%	1.7%	1.7%
WBE*	8.4%	6.2%	18.2%	15.0%
MBE*	23.8%	3.5%	8.6%	14.1%

*MBE – Minority Owned Business Enterprise, WBE – Woman Owned Business Enterprise

Frequently Asked Questions

Q: What is the threshold that buyers use when determining whether a written solicitation is required?

A: Until recently, three written quotes were required for any purchases over \$1,500. Now purchases of up to \$2,499 may be made without written quotes. Departments are encouraged to seek out the most competitive pricing and utilize Certified HUBs when purchasing items or services in this price range.

Q: What information is available for vendors looking to establish a historical price range for a current contract?

A: Formal open records requests must be made to obtain any opened bid's completed bid documentation. Vendors may however receive price information by requesting a bid abstract of previous bids on an expiring contract. This increases a vendor's chances of submitting a competitive bid and allows vendors to become familiar with the historical price ranges that have been successful on a contract. Contact the buyer assigned to

the contract to request the bid abstract.

Q: Does the County provide any sort of assistance to vendors seeking to fulfill County bonding or insurance requirements?

A: Although the County does not provide bonding assistance directly, bonding and surety resources are available upon request. Contact the HUB Office for a current list of local and national resources.

Q: Do the adopted construction HUB goals and sub-goals apply to bid amounts including alternates?

A: Like the City of Austin, the HUB Office's evaluation of the bidder's achievement of the HUB goals are calculated on the base bid. With the elimination of the 30 percent HUB goal, Primes will be asked to make a "good faith effort" to subcontract 23.8 percent of the total contract to Certified Minority Owned HUBs and 8.4 percent to Certified Woman Owned HUBs. Primes should further use the designated sub-goals as a "guideline to diversify their HUB base." Q

Purchasing Staff Phone List

Main Number (512) 854-9700

<i>Purchasing Agent</i>	<i>Cyd Grimes</i>	854-9761
<i>P.A.'s Executive Assistant</i>	<i>Lana Boling</i>	854-9766
<i>Purchasing Clerk IV</i>	<i>Melissa Hanson</i>	854-9915
<i>Purchasing Clerk III</i>	<i>Juan Gonzalez</i>	854-9916
<i>Purchasing Clerk III</i>	<i>Elsa Uresti</i>	854-9917
<i>Purchasing Clerk II</i>	<i>Betty Chapa</i>	854-9918
<i>Asst. Purchasing Agent</i>	<i>Frank Holder</i>	854-9451
<i>Business Sys. Consultant</i>	<i>Scott Worthington</i>	854-4851
<i>Fixed Asset Manager</i>	<i>Ron Dube</i>	854-6458
<i>Warehouse Supervisor</i>	<i>Dan Rollie</i>	854-6459
<i>Fixed Asset Associate</i>	<i>Matt Phillips</i>	854-6459
<i>Purchasing Agent Asst. III</i>	<i>Lou Britt</i>	854-4852
<i>Purchasing Agent Asst. III</i>	<i>Jason Walker</i>	854-4562
<i>Purchasing Agent Asst. III</i>	<i>Eric Francois</i>	854-9853
<i>Purchasing Agent Asst. IV</i>	<i>Vacant</i>	854-4850
<i>Purchasing Agent Asst. IV</i>	<i>Jerry Raisch</i>	854-9724
<i>Purchasing Agent Asst. IV</i>	<i>Marvin Brice</i>	854-9765
<i>Purchasing Agent Asst. IV</i>	<i>Sylvia Gonzalez</i>	854-5860
<i>Asst. Purchasing Agent</i>	<i>Bonnie Floyd</i>	854-4173
<i>HUB Program Coordinator</i>	<i>Sylvia Lopez</i>	854-4561
<i>HUB Program Specialist</i>	<i>Jorge Talavera</i>	854-9914
<i>Purchasing Agent Asst. III</i>	<i>Lolly Jones</i>	854-4204
<i>Purchasing Agent Asst. III</i>	<i>Lori Clyde</i>	854-4205
<i>Purchasing Agent Asst. III</i>	<i>Rose Garcia</i>	854-9763
<i>Purchasing Agent Asst. III</i>	<i>Loren Breland</i>	854-4854
<i>Purchasing Agent Asst. III</i>	<i>Steve Parks</i>	854-9764
<i>Purchasing Agent Asst. III</i>	<i>Richard Villareal</i>	854-4881
<i>Purchasing Agent Asst. II</i>	<i>Donald Rollack</i>	854-4853

The Road

The road goes on and on
As we journey to our home
Pitfalls we meet and go around
But some beat us to the ground
And yet we rise and with each step
We lift ourselves from the depth
Our backs are straight-heads held high
We look ever toward the sky
Yes the road does go on and on
For some it's short for others long
Some may ask what does it take
We travel the road with our faith

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Quarterly Quote

“ Do not go where the path may lead, go instead where there is no path and leave a trail. ”

-Ralph Waldo Emerson

Special Events Calendar

Austin
November 6, 2003

Rookie HUB Forum
Hosted by:

Texas State University and San Marcos Hispanic Chamber of Commerce in cooperation with the US Small Business Administration, San Antonio and Texas Building and Procurement Commission

Location & Time:

San Marcos Activity Center, 501 E. Hopkins, Room 3

For more information contact:

Yolanda Quintanilla at 512-353-1103 or yq@sanmarcoshispanic.com

Dallas
November 7, 2003

First Annual "Super Fair"
Sponsored By:

Dallas Alliance for Business Development

Location & Time:

Dallas Convention Center

For more information contact:

Minerva Hernandez Hinkle at 972-574-4417 or mhinkle@dfwairport.com

San Antonio
December 10, 2003

3rd Annual Small Minority and Woman Business Owners Conference

Sponsored by:

Bexar County and the City of San Antonio

Location & Time:

Henry B. Gonzalez Convention Center

For more information contact:

210-335-2478 or 210-207-3901 or visit www.bexar.org/smwbe or www.sanantonio.gov/edd

Spotlight · Continued from Page 1

facilities inside and out. "Now you can blindfold me and I can find any building in the County," he says.

Matt loves his job and the variety that comes with it. Some days he spends doing general warehouse duties all day and others he is on the road on a carefully routed trip between locations taking in the scenery. Having lunch lakeside on days he is needed at one of the County parks is his favorite perk but his destination of choice on the job is behind bars.

Or at least in the jail complexes themselves because these are his people. "Where a lot of people feel uncomfortable, I feel comfortable. I grew up around these guys and I know someone at every (Sheriff's Office). They're old friends." His mother worked in the Sheriff's Office and his father retired as a Captain from the Austin Police Department after 37 years. Matt was also a Corrections Officer with the County for six years. This makes going to jail fun for the former peace officer. "I get to see tactical equipment, weapons and all the other cool stuff and of course they help me find stuff easily," he says.

Matt deals with every type of personality on the job, which is right up his alley. "My mom calls me a chameleon because I can adapt my personality to just about anyone," he says with a smile. Matt's supervisor, Fixed Assets Manager, Ron Dube says, "What makes Matt stand out is his willingness to always do

whatever needs to be done."

Born and raised in Austin, hunting, fishing, and country western dancing are his loves. UT football is his passion. "I've been a longhorn ever since I could do the hook 'em sign." But Matt's top priorities don't revolve around game day or catching bass anymore. His immediate plans include settling down, getting married and eventually living out what he considers life's "natural order." Ideally, he'll sit on the front porch one day with his wife and watch their grandkids play.

Matt turned down an invitation from a friend recently to go out and have "just one little burger." He has lost over 70 pounds in the last year thanks to a healthier lifestyle, but his determination goes back to his childhood.

Matt remembers watching his dad fixing some lawn equipment one day. His dad sat down with a can of old, rusty screws to finish the repair. "He sat there methodically trying to find a screw that would fit," says Matt, so he went inside and when he returned 45 minutes later, dad was still at it. So Matt asked him, "Dad, why don't you just go to the (hardware store) and spend a dollar or two on a specialty screw? It ain't gonna break ya'." Before his father went on to try the next screw, he looked at Matt and said something he lives by to this day. He said, "Buying that one little screw may not break me, but that way of thinking will." ☺

HUB Program Begins Using New Logo

Businesses are always seeking ways to increase brand awareness. The HUB Office has taken a small step toward doing the same.

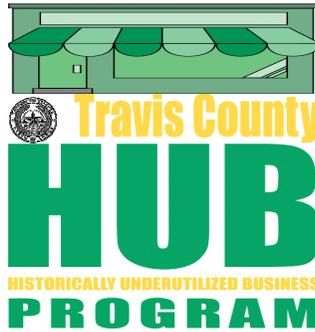
In conjunction with the adoption of the City of Austin's Minority and Woman Owned Business Enterprise (M/WBE) procurement goals and sub-goals, literature and bid documents have been revised to reflect recent changes in how the HUB Program will be administered.

On July 15, 2003, the Travis County Commissioners' Court unanimously adopted the City's M/WBE goals and sub-goals. The action will allow the County to target ethnic areas in need of improvement in terms of the number of contracts awarded, particularly in construction.

The HUB logo alone is not monumental but the

associated changes and improvements represent a fresh start for a program that has not yet reached its pinnacle.

Next May, the Program will celebrate its tenth anniversary. The changes and continuing commitment of the Purchasing Office, Commissioners Court and other elected and appointed County officials lets small and minority businesses know they have support within the County. The HUB logo will increase awareness of a Purchasing process open to all that wish to participate. ☺



When visiting the Purchasing Office, to ensure that you are serviced efficiently, please stop at the front desk. All documents will be logged in, date stamped and distributed appropriately. If you need to speak with a staff member, someone in the Purchasing Office will be happy to assist you.

NOTEWORTHY...

The Purchasing Office has lost one of its finest. After five years with the County, David Moreno, Purchasing Agent Assistant IV, has moved on to a new endeavor in Clearlake, near Houston, in contract management. "David has served the County in an admirable fashion," said Frank Holder, Assistant Purchasing Agent (A.P.A.). "As the old saying goes, our loss will be (their) gain. David will surely be missed here."

KLBJ 590 aired an interview of Cyd Grimes, County Purchasing Agent, last quarter discussing the reasons and objectives for the County's adoption of the City of Austin's Minority and Woman Owned Business Enterprise (M/WBE) goals. For more information on the origin and breakdown of the City's M/WBE goals, visit www.ci.austin.tx.us/snbr.

Frank Holder, A.P.A., provided a presentation on how to successfully complete Travis County bids at the Greater Austin Hispanic Chamber of Commerce's (GAHCC's) "How to Complete a Bid" workshop, the second of a three-part business workshop series that the GAHCC organized. For more information and a complete listing of future workshops, visit www.hispanicaustin.com.

There has been mention of a "Purchasing Liaison Spotlight" for some time. Now the moment has arrived. The Purchasing Office has made a selection and will soon be notifying the individual to be featured in the Winter 2004 Quarterly.

Travis County is currently organizing a Construction Trade Enhancement Committee (CTEC) to advise and assist the Court in developing policy initiatives to enhance the effectiveness of the HUB Program. In addition to overall policy guidance, the Committee will specifically address HUB program goals, monitoring and contract compliance, paying special attention to the construction trade. For more information contact the HUB Office.

We at the Travis County Purchasing Office are striving to improve our service to you. Please let us know how we can better serve you.