



# Purchasing Quarterly

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## The Purchasing Office Says Goodbye to Lana Boling

By Jerome T. Guerrero

When one starts a career, retirement seems so far away. That seemingly distant time has come for Lana Boling. She will now move on to the next chapter in her life. "I had thought a long time about the right time to retire and my husband always said 'you'll know when it's time.' He was right and a few months ago, I got the feeling that January is the right time."

For the past 19½ years, 12 of those with the Purchasing Office as the Office Manager, Lana has called Travis County her career and family. "You get personal with the people you work with. Everyone goes through personal situations and... you listen to each other." Through the years, Lana has seen her office family experience marriage, birth, death, career changes and finding their purpose. "Every day I've enjoyed coming to work."

Lana enjoyed working and helping so many different people. "This job has been very rewarding and fulfilled what I wanted to do with my career." One of the things she wants to do is take her natural abilities and volunteer at a retirement residence near her home. She shared an experience about visiting a nursing home. One of the ladies caught her attention by asking Lana to find an orderly. Lana realized that all she really wanted was some-



one to talk to and listen to her. After leaving, Lana thought about helping out more by volunteering. She wants to help where there is a need. "I don't plan on sitting around the house..." The good thing about retirement, "some days you can go out and do something and other days, you can relax."

Lana imparts some insight to the new Purchasing Office Manager, Alice Leslie. "This is a great job and a wonderful group of people to

*See Goodbye Lana Boling, continued on page 2*

## Travis County Central Campus Study

Travis County has begun the process to develop a comprehensive, long-term Capital Improvement Project providing needed and essential facilities in the Downtown, South Congress, Airport and other County campuses. The first step in this process is to hire an expert to perform a needs analysis to study current and future facility needs in the county, including re-use of the Heman Marion Sweatt Historic Courthouse.



On October 31, 2008, Travis County issued Solicitation No. Q090041-RV for the Central Campus Study for a Strategic Needs Analysis and Facilities Master Plan. Over 130 firms expressed interest in being a consultant to Travis County for the development of the Central Campus Study by viewing the bid documents online. The Purchasing Office will ensure a fair, thorough and coordinated process for all parties interested.

A noncompulsory pre-proposal conference was held on November

14, 2008. There were 57 attendees representing professional firms from across the nation. The pre-proposal conference gave the attendees an opportunity to ask questions under the supervision of the Purchasing Office. One of the attendees commented, "I have been to dozens of these pre-proposal conferences and this is the best, most well organized one I have ever attended."

After the proposals were received on January 5, 2009, an evaluation committee used a scoring matrix supervised by Cyd V. Grimes, C.P.M., Purchasing Agent. The evaluation matrix used criteria such as number of certified professionals, years of experience, number of similar projects completed and inclusion of Historically Underutilized Businesses (HUB) as sub-consultants. Eleven professional firms submitted their proposals.

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### Travis County

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

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Pct. 1 Commissioner Ron Davis  
Pct. 2 Commissioner Sarah Eckhardt  
Pct. 3 Commissioner Karen Huber  
Pct. 4 Commissioner Margaret Gómez

#### Purchasing Board

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261<sup>st</sup> District Ct. Judge Lora Livingston  
250<sup>th</sup> District Ct. Judge John K. Deitz  
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Pct. 3 Cnty. Commissioner Karen Huber

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# R.A.V.E. - Recognize A VALUE-able Employee

By Jerome T. Guerrero

Lisa Rush, Law Librarian under Records Management for Travis County, is this quarter's feature for the R.A.V.E. Under her watchful eyes, she ensures County judges have the legal research materials they require (hard copy or electronic) to dispense justice. She also keeps the Civil and Criminal Court law libraries up-to-date and in good working order.

As expected with any librarian, order and neatness prevail in Lisa's office. Multiple projects and appointments were listed on her bulletin board. When I asked her about current activities, she quickly provided me documents and examples of the services she provides.

Travis County participated in a grant program which allowed the County to hire an attorney and technical writer to create legal forms for the library to assist the general public and other law libraries. The forms are written in plain language so that someone with a 5th - the grade level education can read and understand them.

There are so many sad things that happen when you go to the courthouse. Patrons come in to file divorce, probate a will and other civil matters. So the need to be sympathetic and helpful comes easily to Lisa.

How did Lisa find this path to be a librarian? A native Texan born in Houston but raised in Lufkin, she graduated from Texas A&M with a double major in History and Journalism. She started her graduate studies at The University of Texas at Austin and found out she "loved libraries."



The Law Library has two main customers, attorneys and the general public. Some days you can find Lisa helping with the general public but mostly she is in the background making sure things are operating well. She works hard to make sure that the library operates smoothly in case "something catastrophic were to happen to me."

Another one of Lisa's projects is working with Media to produce how-to videos on how to file many of the legal forms they provide. "Our job is to find legal information for our clients." The videos will demonstrate how to file and submit legal forms.

Lisa helps the courts find vendors to translate legal forms into other languages. She is always striving to improve the signs throughout the courthouse to make it easier for the public to navigate the judicial system. Lisa goes above and beyond the call of duty every day. She is a great asset to Travis County.

Contact Lisa at [lisa.rush@co.travis.tx.us](mailto:lisa.rush@co.travis.tx.us) ✕

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### *Goodbye Lana Boling, continued from page 1*

work with and I know she will love this job as much as I have." Lana is reflecting, trying not to tear up as she shares her thoughts about the administrative staff, Juan Gonzalez, Patricia Estrada, and Vera Cervantes. "They are the best staff I could have asked for." She never had to strictly supervise them because "they knew what they needed to do and always did it."

Lana's family is excited and happy for her retirement. She is especially excited to be spending more time with her new granddaughter, Haley.

She is glad that Clyde, her husband is there to be with her. "I'm blessed to have Clyde with me." They plan on taking trips around the states. There is still more to see and do.

What was the one thing that made her work at the Purchasing Office so rewarding? "The people. Not only the office, but throughout the County. It was like having family." Cyd V. Grimes, C.P.M. was more than her boss, "she is my friend and will always be my friend." Lana will be greatly missed and the office wishes her well. ✕

# Purchasing Code of Ethics Guide

## Part 4 - Conflict of Interest

Conflict of interest rules are directed at preventing public officials from using their authority for personal economic benefit rather than for the benefit of the public. They are also used to disclose any current or former business relationships with government employees - including elected and appointed officials. The penalties for violation range from a Class C misdemeanor with a fine not to exceed \$500 to a felony violation.

The former Special Assistant to the Associate Director of Minerals Revenue Management, Minerals Management Service, at the U.S. Department of Interior (DOI) was sentenced November 14, 2008 for a felony violation of the criminal conflict of interest law, Acting Assistant Attorney General Matthew Friedrich announced.

Jimmy W. Mayberry, 65, of Strawn, Texas, was sentenced to two years of probation and a \$2,500 fine. Mayberry was sentenced in the U.S. District Court for the District of Columbia by Judge Henry H. Kennedy Jr.

According to the plea documents, when Mayberry was nearing retirement from federal service, he and his supervisor explored ways he could return to work for the DOI after his official retirement. It was decided, according to Mayberry's admission, to create a consulting position that, while created and intended specifically for Mayberry, was

required by law to be the subject of open and fair competitive bidding procedures. Mayberry also admitted that in his official capacity before retiring, he created the "statement of work" that would subsequently be used to define the position and evaluate the bids of Mayberry and his competitors. Of all the bidders for the position, Mayberry was the only applicant to receive a grade of "excellent" on every qualification category and was awarded the contract.

Although the penalties may not appear so severe, this is an example of violation of the public's trust in their government officials and employees. When a vendor submits a proposal to any government entity, they should expect to be treated equally and given a fair opportunity to bid. If an appearance of a conflict of interest exists, it could reduce the number of vendors who submit bids. In turn, the government entity would not receive the most competitive price. Integrity and trust once lost, is a long and difficult process to reclaim.

The Travis County Purchasing Office takes responsibility to ensure that every vendor is given equal access and opportunity to the bidding process. The award winning office and HUB Program combine to serve Travis County and the public with a high standard of integrity and trust. ✕

### Central Campus Study, continued from page 1

A quick scan of these firms revealed multiple firms with outstanding architectural and planning qualifications.

The Historically Underutilized Business (HUB) Program received several calls concerning the requirements for HUB participation and filling out the Good Faith Effort (GFE) forms. The HUB staff provided listings of HUB certified professional firms to the prime consultants to

assist them with the GFE requirements. The HUB staff is available to assist prime and sub-consultants.

The evaluation committee scored and presented a selected list of consultants to the Commissioners Court. At a later date Ms. Grimes and the evaluation committee will negotiate a contract on for the County. Updates to the process will be available in latter issues. ✕

## Economic Opportunity Forums

02/25/09 - Austin

Construction HUB Forum

Address: AT & T Executive Education and Conference Center 1900 University Avenue Austin TX

Information: Hosted by the University of Texas at Austin, Project Management and Construction Services. Join us from 2:00 p.m. to 5:00 p.m. for an afternoon of networking and building relationships with Prime Contractors and representatives from other agencies with construction opportunities.

Contact: For information contact: Muriel Kruse, HUB Staff Associate at 512-475-6856 or email [muriel.kruse@austin.utexas.edu](mailto:muriel.kruse@austin.utexas.edu)

04/29/09 - Austin

The University of Texas & University of Texas System HUB Vendor Fair

Information: 9:00 a.m. to 3:00 p.m.

Contact: Annette Smith HUB Associate The University of Texas at Austin 2200 Comal Street Austin, Texas 78722 512 471-2850 512 471-2689 fax

04/30/09 - Austin

Spring 2009 Power to Purchase Technology Expo Online registration and additional information will be available soon

Address: 900 Barton Springs Road Austin, TX 78704

Information: Department of Information Resources (DIR)

Contact: Sofia Guerra [sofia.guerra@dir.state.tx.us](mailto:sofia.guerra@dir.state.tx.us)

## Odyssey

We never think of parting ways  
Along the path of life's highway  
For the road ever goes on and on  
And the journey is so long  
But there are curves around the bend  
That we don't see where they end  
Yet we follow the bright yellow line  
Where it may lead time after time  
In some the road goes on forever  
For others short as on a tether  
But in time the road runs out  
For all of us without a doubt  
So, sing a song and laugh a lot  
Enjoy your days like a tot  
Let's make this odyssey well worthwhile  
And end it with a beautiful smile

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January 2009

# Rein in Repair Costs

By Frederick Marks

Contracting for equipment repair services can be challenging for even the most experienced professional. It usually starts with a call from your end user saying something like this: "Our widget broke and it needs to be fixed. I have to take it to the repair shop. I don't know how much it will cost. I know there are others who repair them, but I don't have enough information to write a repair specification for you to bid. I told them it's an emergency and we need it fixed immediately. Is that OK with you?" That's when dollar signs appear on the eyeballs of the owner of the repair facility.

After your blood pressure returns to normal, you and your new best friend – your end user – have to decide on what you want done. Typically what you want is not to have the operating equipment fixed but rather to have it "restored to original factory specifications and tolerances using original equipment manufacturer (OEM) parts and processes."

How you specify and contract for that type of repair is your challenge. For starters, be wary of terms such as "remanufactured," "refurbished," "reconditioned," "rebuilt," "like new" and "used." They differ greatly by industry and local practice, and unless you are using OEM specifications, you may get less than what you expected. Sometimes a call to the OEM will save you hours and dollars. At the very least, you'll gain valuable advice.

You need to define what you want done. Find out if the manufacturer of the equipment has a repair specification that you can use. If not, check one of the professional societies, such as SAE or ASME, to see if they have generic specifications for repair or refurbishment. Professional societies are the undiscovered country when it comes to research. Their membership lists are an immediate bid list for you.

After you decide what you want done, structure your solicitation document to reflect the pricing for the different stages of the repair. The more categories of work you can have bidders price for you, the easier it will be for you to evaluate bids. For example, all bidders will have to transport the equipment to their shop. That is a line item in your bid. They will have to inspect the equipment and determine what needs to be repaired. That's another line item. The labor rates are different for transportation than for inspection and generating a bid.

Determine how many hours you think it will take to repair the equipment, and include that as an estimate. Have bidders categorize the hourly rates of their repairs (different categories of labor = different hourly rates). This information can be structured as "estimated for bid evaluation purposes only."

Repair parts also can be estimated by bidders, based on a manufacturer's



price list. ALWAYS ASK FOR YOUR DISCOUNT OFF THE LIST. Estimate how much that will be and include that as a line item in your solicitation. In the event of unforeseen conditions that may arise during the repair, you need to include in your solicitation a way to determine pricing. Ask for shop rates and additional costs for specialized equipment. Do not depend on the bidder to provide these you without asking. It's a profit center for them.

Consider including in your terms and conditions a request for qualification information such as: years in business; a list of shop equipment; contracts for repairs of similar equipment; and approvals from manufacturers showing that the bidder is an authorized repair facility. You also should reserve the right to approve costs before proceeding and to examine all records such as time sheets and invoices for repair parts. Have your end user review them for reasonableness and accuracy. Reserve the right to approve all work prior to proceeding to ensure that proper procedures are followed.

Follow-up is important. Have your end user or engineer track the progress of the repair. If necessary, have a failure analysis performed. Ask for the replaced parts back so your end user can verify that new parts were installed. You may even want to hire a professional engineer to do this for you, which is a professional service that also can be bid. An engineer can help you negotiate and write your specifications, and they'll be working for you – not the bidder.

NEVER, NEVER let your end user send operating equipment to a repair facility without some form of agreement regarding pricing or repair specifications. In the worst-case scenario, costs would be over your bid limit and you'd be left with a box of parts and a valuable piece of operating equipment in a stage of disrepair. If you found that the original repair facility wasn't the low bidder, one bidder would have to pick it up from another bidder's facility. You'd have no control over what was done, possibly leading to increased costs.

Use your training and skills – it's all part of the value you add as a professional to your organization. Good luck. ✕

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# Special Information

Supplement to the Winter 2009 Issue

 *Purchasing Quarterly*

## Small Business Development Program

By Michelle LoRee Frith

*The Travis County HUB Program partners with the City of Austin and other government entities to foster cooperative working relationships on HUB Opportunities and others issues regarding the HUB community.*

Small business owners in the Austin area have a jewel in Central Austin. The City of Austin's Small Business Development Program offers resources for entrepreneurs to expand their existing businesses, or to help those with dreams of business ownership to realize their visions. The Small Business Development Program (SBDP) has been an advocate for small business owners in Austin and the surrounding area since 2000 and has grown in size and scope since its inception. The program, part of the Economic Growth and Redevelopment Services Office, has become a portal of information for Austin entrepreneurs to get the tools they need to be successful in our changing economy.

Located just south of Lady Bird Lake at the corner of South First and Barton Springs Road in One Texas Center, the Small Business Development Program (SBDP) has many different resources for small businesses owners, including BizAid Business Development which provides free technical assistance with writing or reviewing existing business plans and marketing plans. Each Tuesday morning, SBDP offers a free one and one-half hour Business Start-Up Orientation which covers the very basic questions to consider when opening a small business. Since access to capital is the number one need of small business owners, BizAid Accessing Capital offers free credit reviews for business owners, assistance with filling out loan applications and help with understanding business finances. BizAid Business Education conducts low-cost classes on topics ranging from Legal Contracts to QuickBooks to Copyright and Intellectual Property.

Besides the BizAid program, SBDP operates the Business Solutions Center (BSC). The BSC is a technology resource center containing business research software and web subscriptions to help small business owners find business opportunities and utilize technology to start or expand their businesses. The Business Solutions Center has printers, a copier, fax machine, scanners and other office equipment ideal for Austin entrepreneurs. The BSC is free to access



and has minimal fees for printing, copying and faxing. The Center is open Monday through Friday from 8:30 a.m. to 4:30 p.m. on the first floor of One Texas Center, located at 505 Barton Springs Road. The resources include web subscriptions to research bid opportunities in construction or construction-related business and business sales opportunities with the

government, a nationwide commercial real estate database, business to business research web subscriptions, demographics technology and business plan software, among others. Additionally, the SBDP offers small business owners information and referral to local organizations that may be helpful to their businesses. SBDP offers CD's containing self-referral resource guides for business networking organizations, non-profit business service providers and a start-up guide. These resources can be instrumental in discovering not only who can help an entrepreneur, but where other small business owners meet for networking.

SBDP has recently launched the Small Business Mapping project, [www.explorelocalaustin.org](http://www.explorelocalaustin.org), which highlights small businesses in five areas,

including Guadalupe, East 5th and 6th, East 11th and 12th, South First and North Loop. This web site helps visitors or residents to learn what small businesses are in these areas, what they do and find their contact information. Many of these small business owners have no other web presence. Plans are underway to add more small business areas to the website.

Finally, special events are offered to the community. Annual events bring content-area experts together with Austin entrepreneurs. The annual Meet the Lender, held each August, brings over 40+ lenders to Palmer Events Center where the small business owner can discuss financing in a casual setting. Getting Connected, held in the spring, helps entrepreneurs to access dozens of non-profit service providers and business networking groups at an information fair. The Industry Specific Start-Up Conference focuses on one industry every other year and brings experts and successful business owners to share their knowledge and experience with the new business owner.

Discover the jewel of Central Austin! For more information, call 512.974.7800 or visit their website at [www.cityofaustin.org/sbdp](http://www.cityofaustin.org/sbdp).

*Ms. LoRee Frith is the Outreach and Marketing Coordinator for the Small Business Development Program (SBDP) with the City of Austin*