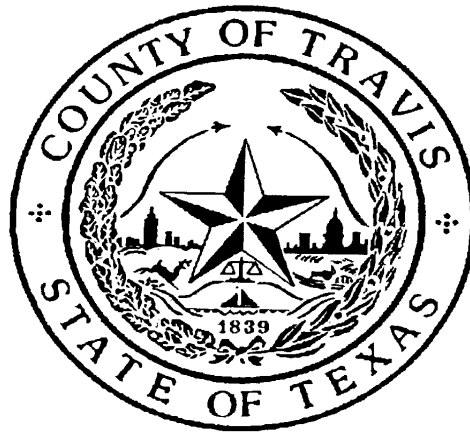


# *How to do Business with Travis County*

## **Reference Manual**



**Office of the Travis County Purchasing Agent**

**Travis County Purchasing  
Ned Granger Building  
314 W. 11<sup>th</sup> Street, Suite 400  
Austin, Texas 78701  
(512) 854-9700  
[www.co.travis.tx.us](http://www.co.travis.tx.us)**

**Rev. March 2009**

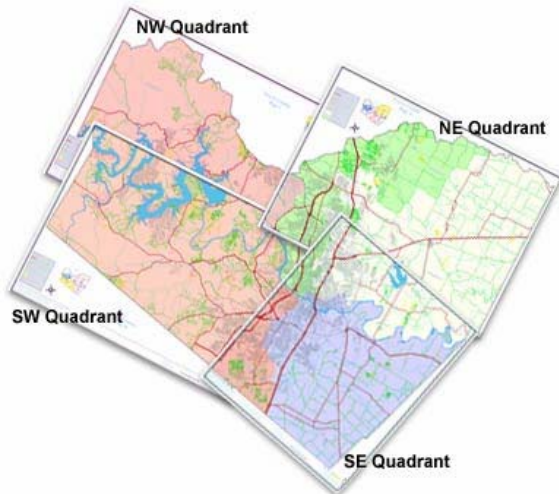
# Travis County

## Reference Manual



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

Ms. Cyd V. Grimes, C.P.M., 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 all County property. Ms. Grimes is a Past President of the Texas County Purchasing Association and currently serves as the Legislative Chair for TCPA. She currently serves on the Board of the Texas Association of School Boards, Local Government Purchasing Cooperative. She holds a Bachelor of Business Administration degree from Stephen F. Austin State University and is a Certified Purchasing Manager.



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Travis County Purchasing Office  
314 W. 11<sup>th</sup> Street, Suite 400  
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Austin, Texas 78701  
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Fax (512) 854-9185  
[www.co.travis.tx.us](http://www.co.travis.tx.us)

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 and the Hospital District.
- ◆ 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.

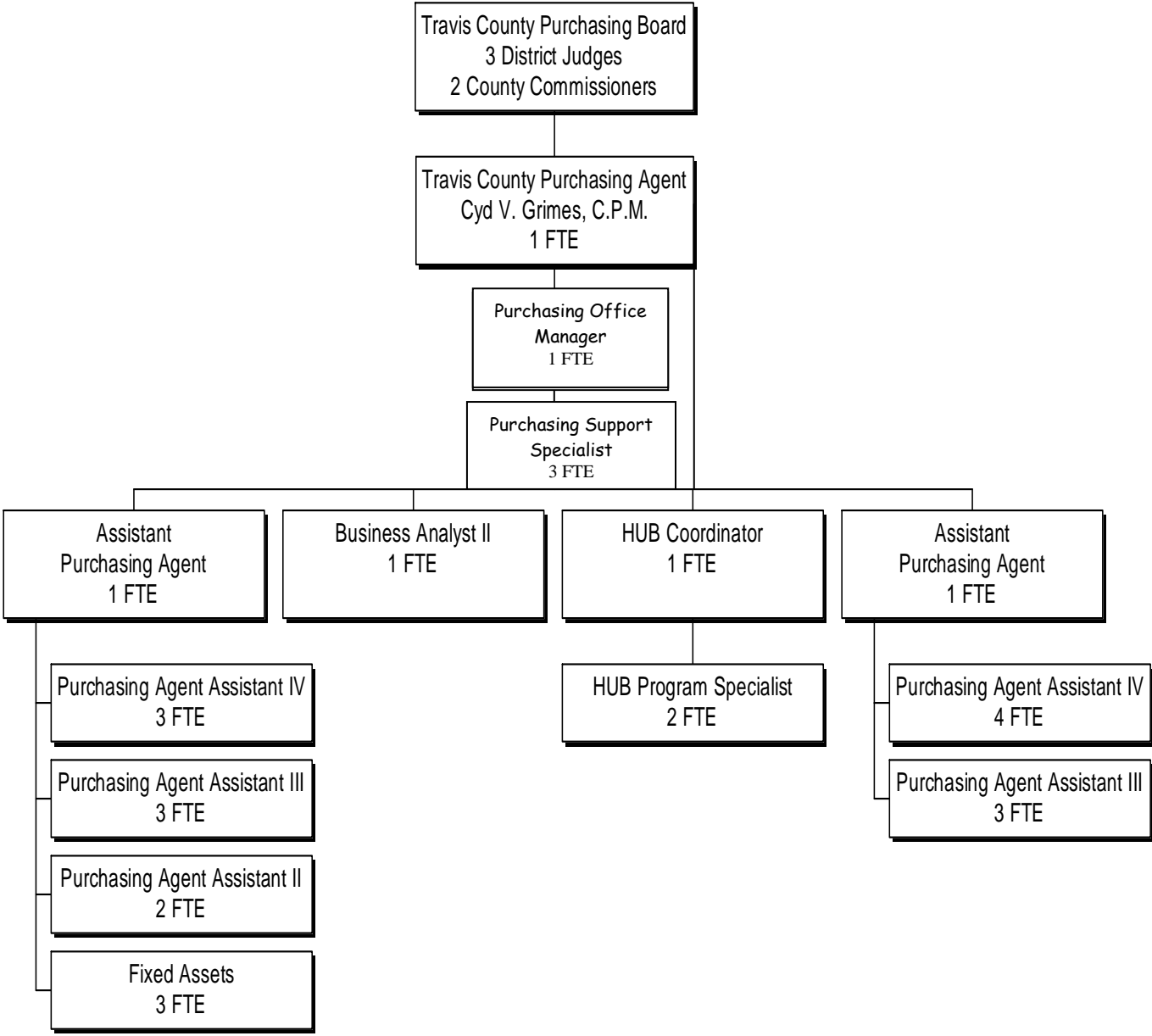
## **ETHICS POLICY...**

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.

# TRAVIS COUNTY PURCHASING OFFICE ORGANIZATIONAL CHART



# *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-***

*Office Supplies*

*Uniforms*

*Temporary Employment Services*

*Printing of Forms*

*Paper*

*Surveillance Equipment*

*Fuel*

*Car Washing Services*

*Inmate Clothing*

*Wall Repair Services*

*Trap Rock*

*High-Tech Equipment*

*Maintenance Contracts*

*Maintenance of*

*Hardware/Software*

*Software Licenses*

*Communication Systems*

*Camera Systems*

*Voting Equipment*

*Computer Hardware*

*Software*

*Paper Products*

*Computer Cables*

*Vehicle Parts & Accessories*

*Playground Equipment*

*Security Guard Services*

*Telephone Equipment*

*Printing Services*

*Moving Services*

*Road Materials*

*Pest Control*

*Furniture*

*Modular Systems Furniture*

*Refuse Collection*

*Pharmaceuticals*

*Helicopter Maintenance*

*Electronic Monitoring*

*Insurance (health, dental, life*

*AD&D, workers comp.*

*Employee assistance programs, etc.)*

*Plastic Containers*

*Floor Covering Material*

*Building Material*

*HVAC*

*Publications*

*Bathroom Accessories*

*Plumbing Fixtures*

*Classified Advertising*

*Copier Rentals*

*Surface Aggregates*

*Car Washing Services*

*Records Storage*

*Erosion Control*

*Hardware Store Items*

*Asphaltic Road Materials*

*Janitorial Services*

## ***-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 foster public confidence in the integrity of the County procurement process.

# Subscribe To Travis County's



**BIDSYNC**

## Here's how...

Travis County is partnering with a third-party vendor, BidSync, to maintain our Vendor Database and to distribute and receive electronic bids via the Internet. There is **NO FEE** to register as a vendor or to participate in a Travis County solicitation.

Some of the features that benefit Vendors are:

- BidSync can reduce the time and effort required by Vendors to submit bids and proposals by over 90%.
  - Every time Vendors log onto BidSync, they are automatically provided a list of all current bid requests for products or services in the classifications and geographical areas selected by Vendors.
  - BidSync automatically notifies Vendors via email whenever a Public Agency requests a bid or proposal for products or services, or makes a change in a previously sent request for a bid or proposal.
  - BidSync provides Vendors with the ability to easily submit multiple bids when they carry more than one product that satisfies bid specifications.
  - BidSync provides Vendors with the ability to provide additional information on bids when doing so helps clarify their bid or proposal.
  - BidSync provides Vendors with the ability to attach photos, descriptive material, etc. to most bids.
  - BidSync significantly reduces errors.
  - Submittals of bids via BidSync are instant.
  - Even though the capabilities incorporated into BidSync are extensive and sophisticated, using BidSync is simple and easy.
  - BidSync provides free training during business hours.
- Go to: <http://www.bidsync.com/> Follow the instructions to register. Registering with BidSync not only gives you access to Travis County solicitations, but to other government agencies using this system.





### Step 1: Registration

- A. Go to [www.bidsync.com](http://www.bidsync.com)
- B. Click on the Register button and follow the registration process
- C. Login to [www.bidsync.com](http://www.bidsync.com) when you receive a Welcome e-mail

### Step 2: Profile Setup

1. Login to [www.bidsync.com](http://www.bidsync.com)
2. Click Setup next to Regions to define your area of work
3. Click Setup next to Classifications to select all products and/or services you provide
4. Click Setup next to Notifications to select notification types
5. Click Setup next to Agency Types to determine which types of Agencies with which you would like to work

### Step 3: Placing a Bid

1. Login to [www.bidsync.com](http://www.bidsync.com)
2. Locate the bid to which you are responding
  1. Click the Search tab on the top left of the page
  2. Enter keyword or bid number and click search
3. Click on the bid title/description to open the Bid Information Page
4. View and Accept all documents in the document section
5. Select Place Offer found at the bottom of the page
6. Enter your pricing, notes, and upload attachments to this page
7. Click submit at the bottom of the page
8. Review offers
9. Enter your password and click confirm
10. Your offer is received

Please contact us with any questions!

BidSync Vendor Support  
[vendorsupport@bidsync.com](mailto:vendorsupport@bidsync.com)  
800-990-9339 ext#1  
629 E. Quality Dr  
Suite 101  
American Fork, UT 84003

# 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 H.T.E. 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  
(512) 854-9188  
P. O. Box 149325, Austin, Texas 78714-9325  
5501 Airport Blvd, Austin, Texas 78751  
www.co.travis.tx.us

## **How To File An Assumed Name (DBA) In Travis County**

1. Come to 5501 Airport Blvd to conduct a search of the records to determine if the name you wish to use has been filed by someone else. We will conduct the search for you for \$10.00 (**PAYABLE IN ADVANCE**).
2. Complete the Assumed Name form. For a fee of \$2.00 our office will certify the form as Clerks of the Court. For a fee of \$5.00, Notary Services are available in the Tax Office.
3. The form is filed in our office. The fee for filing the Assumed Name is \$14.00 with one owner and an additional 50¢ for any other names listed.

**Payable in cash, cashier's check, or money order.  
For an additional \$3 fee, you may pay by credit  
card. NO CHECKS!!!!!!**

4. The original Assumed Name form will be mailed back to the return address in about 10 days from date of filing.
5. The Assumed Name is good for 10 years. If any changes are made during the 10 year period, you will need to file a new form. If you wish to continue to use the name at the end of 10 years, you will need to file a new Assumed Name form.
6. If you discontinue using the business name you will need to file an Abandonment. The fees are the same as the Assumed Name.

**OFFICE HOURS 8:00am-5:00pm, Monday-Friday  
LOCATION: Travis County Clerk's Office 5501 Airport Blvd  
QUESTIONS: (512) 854-9188**

Recording, Elections, Accounting,  
and Administration Divisions  
5501 Airport Blvd  
Austin, Texas 78751

Misdemeanor Records, Civil/Probate,  
and Records Management Divisions  
Travis County Courthouse  
1000 Guadalupe  
Austin, Texas 78701

## **BUSINESS START-UP CHECK LIST**

Listed below is information that should be helpful when starting a new business in Texas.

### **INCORPORATION/LIMITED LIABILITY COMPANY/LIMITED PARTNERSHIP/CERTIFICATE OF AUTHORITY**

To conduct business in the State of Texas, please contact the Office of The Secretary of State, 1019 Brazos, Rudder Bldg., 78701, (512) 463-5555.

### **ASSUMED NAME CERTIFICATE/DBA (DOING BUSINESS AS)**

Unincorporated businesses must file an assumed name certificate in the County Clerk's Office in the County where the business is located.

### **LOCAL REQUIREMENTS**

Contact the City Clerk of the city where the business will be located.

### **SALES TAX PERMIT**

For sales tax permit and information, contact the State Comptroller of Public Accounts, 1711 San Jacinto Blvd, Central Services Building, Ste 180, Austin, Texas 78701-1416, (512) 463-4600, or (800) 248-4900.

### **FEDERAL TAX ID**

For a federal tax identification number and any other federal information, please contact the Internal Revenue Service (800) 829-4933.

### **EMPLOYER REQUIREMENTS**

To obtain an employer identification number, contact the Texas Workforce Commission/Tax Department, 101 E. 15<sup>th</sup> St., Austin, Texas, 78778, (512) 463-2731. The Commissioner's Office representing employers provides an information package for employers. Please fax your request for the package to (512) 463-3196.

### **WORKERS' COMPENSATION**

For information on workers' compensation classifications, contact the Texas Department of Insurance, 333 Guadalupe, Austin, Texas, 78701, (512) 322-3493. To become more familiar with basic requirements for worker's compensation in Texas or for a new law guide, a quarterly news letter, and other information, contact Texas Workers' Compensation Commission, 400 S. IH 35, Austin, Texas, 78704, (512) 804-4000.

## Definitions of Types of Business

### Proprietorship

Business, usually unincorporated, and owned and controlled exclusively by one person. Such a business is commonly designated a "sole proprietorship."

### Sole Practitioner

One who is engaged in the exercise or employment of any art or profession as contrasted with one who teaches such. (A lawyer who is engaged in the practice of his profession; a physician who is similarly engaged. Any person who is practicing a profession." Ballantine's Law Dictionary).

### Partnership

A voluntary contract between two or more competent persons to place their money, effects, labor, and skill, or some or all of them, in lawful commerce or business, with the understanding that there shall be a proportional sharing of the profits and losses between them.

### General Partnership

A partnership in which the parties carry on all their trade and business, what ever may be, for the joint benefit and profit of all parties concerned, whether the capital stock be limited or not, or the contributions thereto be equal or unequal. One in which all the partners share the profits and losses as well as the management equally, though their capital contributions may vary.

### Limited Partnership

A partnership consisting of one or more general partners, jointly and severally responsible as ordinary partners, and by whom the business is conducted, and one or more special partners, contributing in cash payments a specific sum as capital to the common stock, and who are not liable for the debts of the partnership beyond the fund so contributed.

### Real Estate Investment Trust

(A partnership formed by a group of people pooling their capital for the purpose of investing in real estate. Ballantine's Law Dictionary)

### Joint Stock Company

An unincorporated business enterprise with ownership interests represented by shares of stock. It was recognized at common law and by statute is generally treated as an entity for certain purposes.

### Joint Venture

A legal entity in the nature of a partnership engaged in the joint prosecution of a particular transaction for mutual profit. An association of persons jointly undertaking some commercial enterprise. It requires a community of interest in the performance of the subject matter, a right to direct and govern the policy in connection therewith, and duty, which may be altered by agreement, to share both in profit and losses.

All definitions by Black's Law Dictionary unless otherwise noted. Travis County accepts no responsibility, and this is not meant to replace the advise of an attorney.



# 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, or Texas Unified Certification Program. 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
<b>Overall (MBE) Goal</b>	<b>12.9%</b>	<b>3.5%</b>	<b>16.5%</b>	<b>14.1%</b>
<b>Sub-Goals:</b>				
<b>African-American</b>	1.7%	0.3%	1.7%	2.5%
<b>Hispanic</b>	9.7%	2.5%	9.5%	9.9%
<b>Asian American</b>	0.8%	0.7% (Native/Asian Combined Goals)	4.7%	1.7% (Native/Asian Combined Goals)
<b>Native American</b>	0.7%	0.7% (Native/Asian Combined Goals)	0.6% (Native/Asian Combined Goals)	1.7% (Native/Asian Combined Goals)
<b>Overall (WBE) Goal</b>	<b>12.6%</b>	<b>6.2%</b>	<b>14.2%</b>	<b>15.0%</b>

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.

## CONSTRUCTION PLAN ROOMS

<b>AMTEK Planrooms &amp; Engineering Reports</b> 7801 N Lamar Blvd., Ste A137 Austin, TX 78752 phone 323-0508 fax 323-0920	<b>CDCNEWS (CDC Publishing, LLC)</b> 4201 W Parmer Ln, Ste. A200 Austin, TX 78727 phone 219-5150 fax 219-5155
<b>Associated Builders and Contractors (ABC)</b> 3006 Longhorn Blvd., Suite 104 Austin, TX 78758 phone 719-5263 fax 719-3278	<b>City of Austin - Business Solutions Center</b> One Texas Center 505 Barton Springs Road, 1st Floor Austin, TX 78704 phone 974-7781 fax 974-9150
<b>Associated General Contractors (AGC)</b> Building Branch 609 South Lamar Austin, TX 78704 phone 442-7887 fax 442-3503	<b>City of Austin Construction &amp; Technology Center</b> 4201 Ed Bluestein Blvd., Ste. 2103 Austin, TX 78721 phone 974-7620 fax 974-7622 (974-7745 Hemet M.)
<b>Associated General Contractors (AGC)</b> Highway, Heavy, Utilities and Industrial Branch Division 300 Barton Springs Rd. Austin, TX 78704 phone 478-4691 fax 478-7936	<b>McGraw-Hill Dodge Plan Room</b> 304 East 3rd Street Austin, TX 78701 phone 458-1341 fax 467-2806
<b>Austin Black Contractors Association (ABCA)</b> 6448 Hwy. 290 East, Ste. E-107 Austin, TX 78723 phone 467-6894 fax 467-9808	<b>Reed Construction Data (RCD) Document Processing</b> 30 Technology Pkwy South, Ste 500 Norcross, GA 30092 phone 800-424-3996 fax 800-303-8629
<b>Austin Metropolitan United Black Contractors</b> phone 784-1891 <i>NOTE: Delivered to COA Construction &amp; Tech Center</i>	<b>U. S. Hispanic Contractors Assoc. de Austin</b> 1106 Clayton Lane, 511 W Austin, TX 78723 phone 374-1595 fax 374-1421
<b>Asian Construction Trade Association (ACTA)</b> 4201 Ed Bluestein Blvd., Ste. 2105 Austin, TX 78721 phone 926-5400 fax 926-5410	<b>Whitley &amp; Siddons</b> PO Box 164047 Austin, TX 78716 phone 477-9491 fax 481-1983
<b>Builders Exchange</b> 4047 Nacoperrin Ste 100 San Antonio TX 78217 phone 210-564-6900 fax 210-564-6901	

### Travis County Recognizes these certifications

State of Texas Comptroller of Public Accounts	<a href="http://www.window.state.tx.us/procurement/prog/hub/hub-certification">www.window.state.tx.us/procurement/prog/hub/hub-certification</a>
City of Austin	<a href="http://www.ci.austin.tx.us/purchase/default.htm">http://www.ci.austin.tx.us/purchase/default.htm</a>
Texas Unified Certification Program (TUCP) (TUCP uses SCTRCA to certify, ask for TxDOT form)	<a href="http://www.dot.state.tx.us/business/tucpinfo.htm">www.dot.state.tx.us/business/tucpinfo.htm</a>
	<a href="http://www.sctrca.org">www.sctrca.org</a> (certifies TxDOT)