
HELP
#EndTheStreakTX
End the streak of daily deaths on Texas roadways.
TxDOT.gov (Keyword: #EndTheStreakTX)
#EndTheStreakTX Toolkit

August 14, 2024

Professional Engineering Procurement Services (PEPS)

Jaime A. Vela, Jr., P.E.

PEPS Central Service Center Director

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PEPS – Overview and Mission

Professional Engineering Procurement Services represents the consolidated procurement organization supporting **engineering, architectural and surveying** contracts



Mission
Work with our TxDOT customers and external partners to procure the most qualified consultants to deliver effective solutions for Texas

Executive Assistant
Kristina Kottke

Division Director
Martin L. Rodin, PE



Deputy Division Director
Lucio Vasquez, PE

Austin Service Center Section Director
Charles Davidson, PE, CTCM

Fort Worth Service Center Section Director
Natashia Tabataii, PE

Center of Contract Utilization Manager
Gail Morea, PE

Business Operations Section Director
Roy Gonzales

Central Service Center Section Director
Jaime A. Vela, PE

Houston Service Center Section Director
Kimlinh Nguyen, PE

DRIVE Program
Caleb Bryant, PE, PMP

Center of Excellence Section Director
Dan Neal, PE, PG, CTCM, CTPM

Dallas Service Center Section Director
Joseph Jancuska, PE

San Antonio Service Center Section Director
Clara Carbajal-Sanchez, PE

Controls Center Section Director
Shana Thomas, CTCM, PMP

El Paso Service Center Section Director
Jaime Perales, PE, CFM

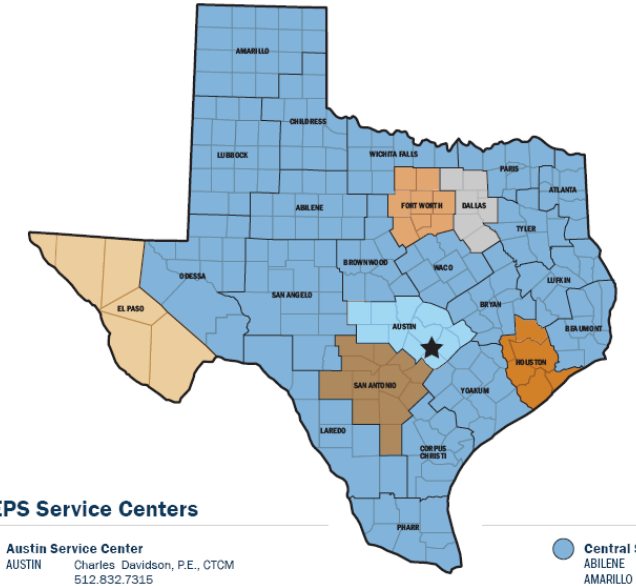
Service Center for Divisions Section Director
Kori Rodriguez, PE

Invoice Center Section Director
Tira Dobrozensky, CTCM

Negotiations Center Manager
Rebecca Pinto, PE

Support Service Center Manager
Tina Farias, CTCM, CTCD

PEPS PROFESSIONAL ENGINEERING PROCUREMENT SERVICES



PEPS Division

Austin HQ

PEPS Division Director
Martin L. Rodin, P.E.
512.413.4310
Martin.Rodin@txdot.gov

Deputy Division Director
Lucio Vasquez, P.E.
512.925.9578
Lucio.Vasquez@txdot.gov

PEPS Support Centers

Business Operations Center
Roy Gonzales
512.781.8212
Roy.Gonzales@txdot.gov

Invoice Center
Tira Dobrozensky, CTCM
512.317. 8511
Tira.Dobrozensky@txdot.gov

Center of Excellence
Dan Neal, P.E., P.G. CTCM, CTPM
512.416.2667
Dan.Neal@txdot.gov

DRIVE Program
Caleb Bryant, P.E., PMP
281.224.8484
Caleb.Bryant@txdot.gov

Center of Contract Utilization
Gail Morea, P.E.
713.876.1258
Gail.Morea@txdot.gov

Negotiations Center
Rebecca Pinto, P.E.
915.790.4344
Rebecca.Pinto@txdot.gov

Controls Center
Shana Thomas, CTCM, PMP
737.230.7238
Shana.Thomas@txdot.gov

Support Services Center
Tina Farias, CTCM, CTCD
432.202.2144
Tina.Farias@txdot.gov

PEPS Service Centers

Austin Service Center
AUSTIN — Charles Davidson, P.E., CTCM
512.832.7315
Charles.Davidson@txdot.gov

Central Service Center

ABILENE	BRYAN	LUBBOCK	TYLER
AMARILLO	CHILDRESS	ODESSA	WACO
ATLANTA	CORPUS CHRISTI	PARIS	WICHITA
BEAUMONT	LAREDO	PHARR	FALLS
BROWNWOOD	LUFKIN	SAN ANGELO	YOAKUM

Jaime A. Vela, P.E.
512.416.2007 or
956.712.7730
Jaime.A.Vela@txdot.gov

Dallas Service Center
DALLAS — Joseph Jancuska, P.E.
214.320.6187
Joseph.Jancuska@txdot.gov

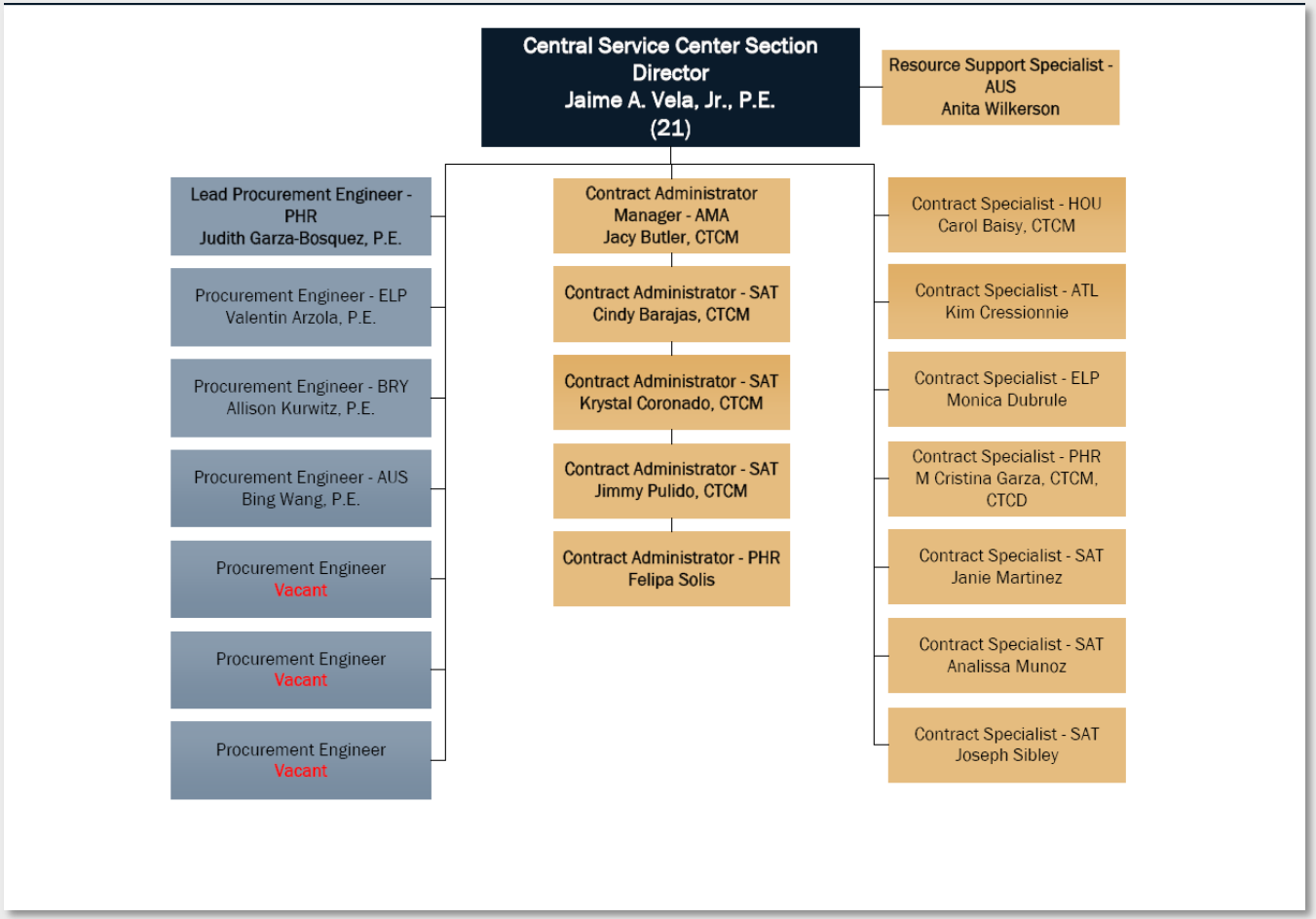
Fort Worth Service Center
FORT WORTH — Natashia Tabatabaii, P.E.
469.766.9281
Natashia.Tabatabaii@txdot.gov

El Paso Service Center
EL PASO — Jaime Perales, P.E., CFM
915.790.4231
Jaime.Perales@txdot.gov

Houston Service Center
HOUSTON — Kimlinh Nguyen, P.E.
713.802.5799
Kimlinh.Nguyen@txdot.gov

San Antonio Service Center
SAN ANTONIO — Clara Carbajal-Sanchez, P.E.
210.209.7885
Clara.CarbajalSanchez@txdot.gov

Service Center for Divisions
AUSTIN — Kori Rodriguez, P.E.
210.284.5048
Kori.Rodriguez@txdot.gov


Central Service Center Section Director
Jaime A. Vela, Jr., P.E.
(21)
Resource Support Specialist - AUS
Anita Wilkerson
Lead Procurement Engineer - PHR
Judith Garza-Bosquez, P.E.
Procurement Engineer - ELP
Valentin Arzola, P.E.
Procurement Engineer - BRY
Allison Kurwitz, P.E.
Procurement Engineer - AUS
Bing Wang, P.E.
Procurement Engineer
Vacant
Procurement Engineer
Vacant
Procurement Engineer
Vacant
Contract Administrator Manager - AMA
Jacy Butler, CTCM
Contract Administrator - SAT
Cindy Barajas, CTCM
Contract Administrator - SAT
Krystal Coronado, CTCM
Contract Administrator - SAT
Jimmy Pulido, CTCM
Contract Administrator - PHR
Felipa Solis
Contract Specialist - HOU
Carol Baisy, CTCM
Contract Specialist - ATL
Kim Cressionnie
Contract Specialist - ELP
Monica Dubrule
Contract Specialist - PHR
M Cristina Garza, CTCM, CTCD
Contract Specialist - SAT
Janie Martinez
Contract Specialist - SAT
Analissa Munoz
Contract Specialist - SAT
Joseph Sibley

THEN – FY 2015

- No. of PEPS Employees 69 FTE
- TxDOT Annual Letting $3.0 B
- Procurement Amount $600 M
- No. of Contracts 120 EA
- No. of Work Authorizations 600 EA
- Work Authorization Budget $400 M
- No. of Late WA 139 EA
- No. of Invoices 9,000 EA
- % of Invoices Paid On Time 86%

NOW – FY 2024

- No. of PEPS Employees 144 FTE
- TxDOT Annual Letting $13.0 B+
- Procurement Amount $2.4 B +
- No. of Contracts 320 EA +
- No. of Work Authorizations 1,600 EA +
- Work Authorization Budget $1.6 Billion
- Number of Late WA 13 EA
- No. of Invoices 18,000 EA +
- % of Invoices Paid On Time 98%

PEPS Procurement -QBS

TxDOT uses qualifications-based selection (QBS) to procure engineering, architecture, and surveying services. QBS requires TxDOT to select firms based solely on their qualifications.

The process used to select providers for professional services contracts is comprised of planning, solicitation, evaluation, and selection phases.



* QBS is defined by the Brooks Act (40 USC §§110-1104, which states that the federal government is required to advertise and negotiate contracts for architectural and engineering services
QBS is also defined at the state level in the Professional Services Procurement Act (Texas Government Code Chapter 2254), which specifies that governmental entities must select a provider for professional services contracts on the basis of demonstrated competence and qualifications to perform the services for a fair and reasonable price. based on demonstrated competence and qualifications at fair and reasonable prices.

Waves

PEPS utilizes long-range planning



PEPS uses an annual plan of procurement events for anticipated PEPS contracts

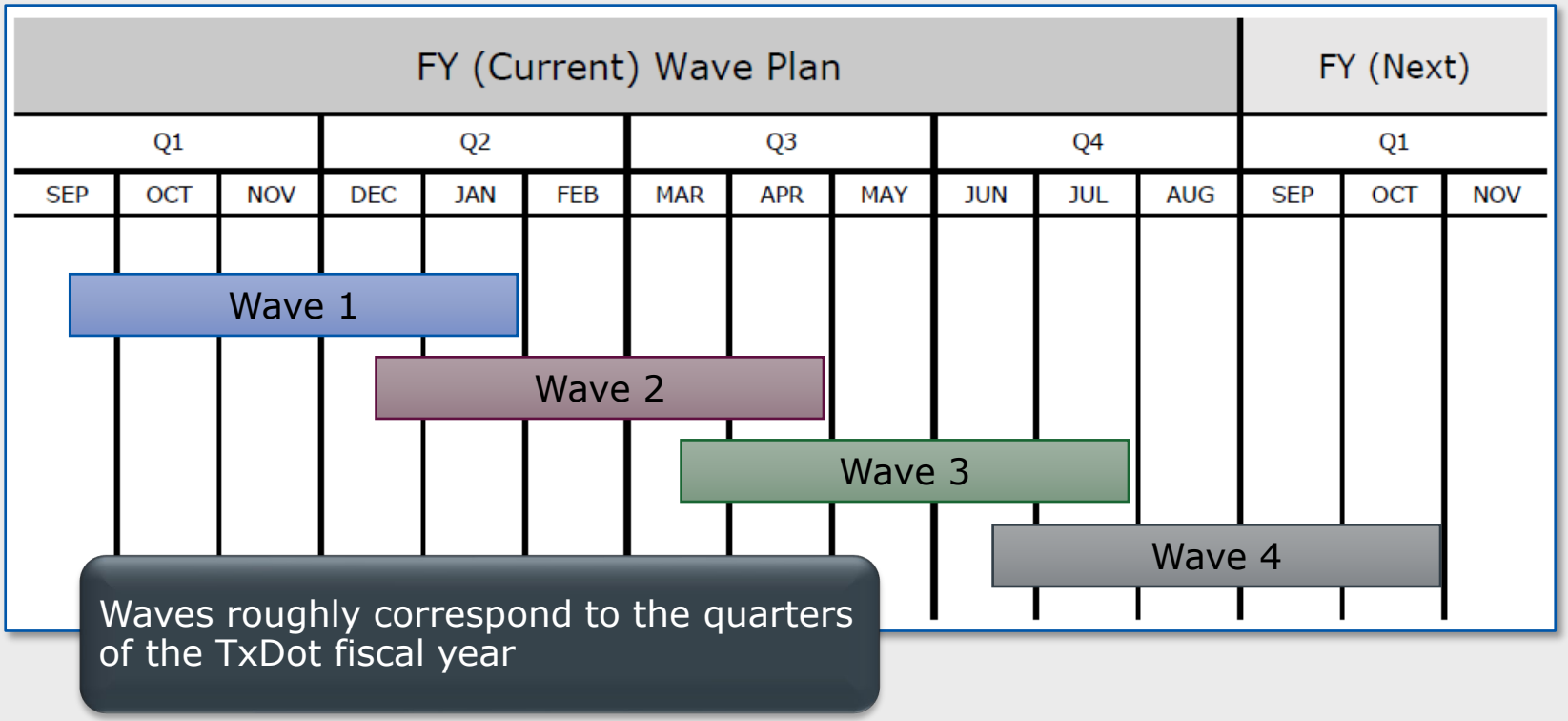


Each procurement event is a discipline of work



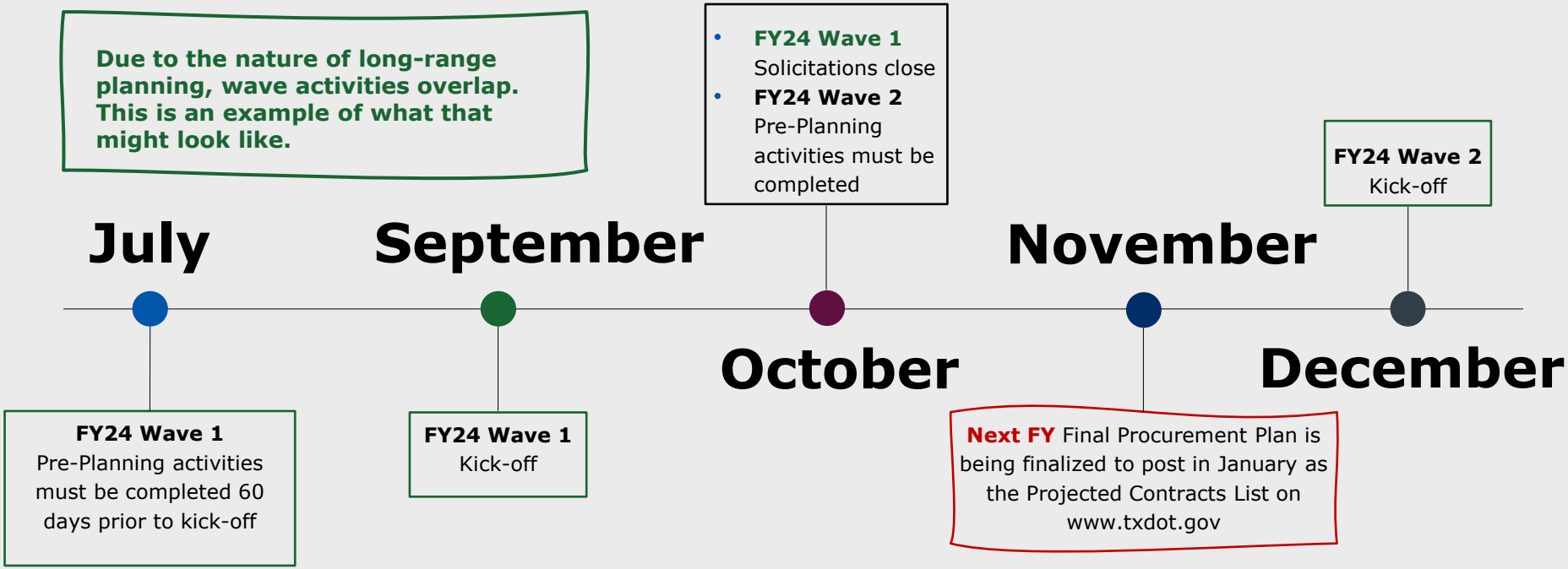
Events are organized into four waves

Waves Calendar

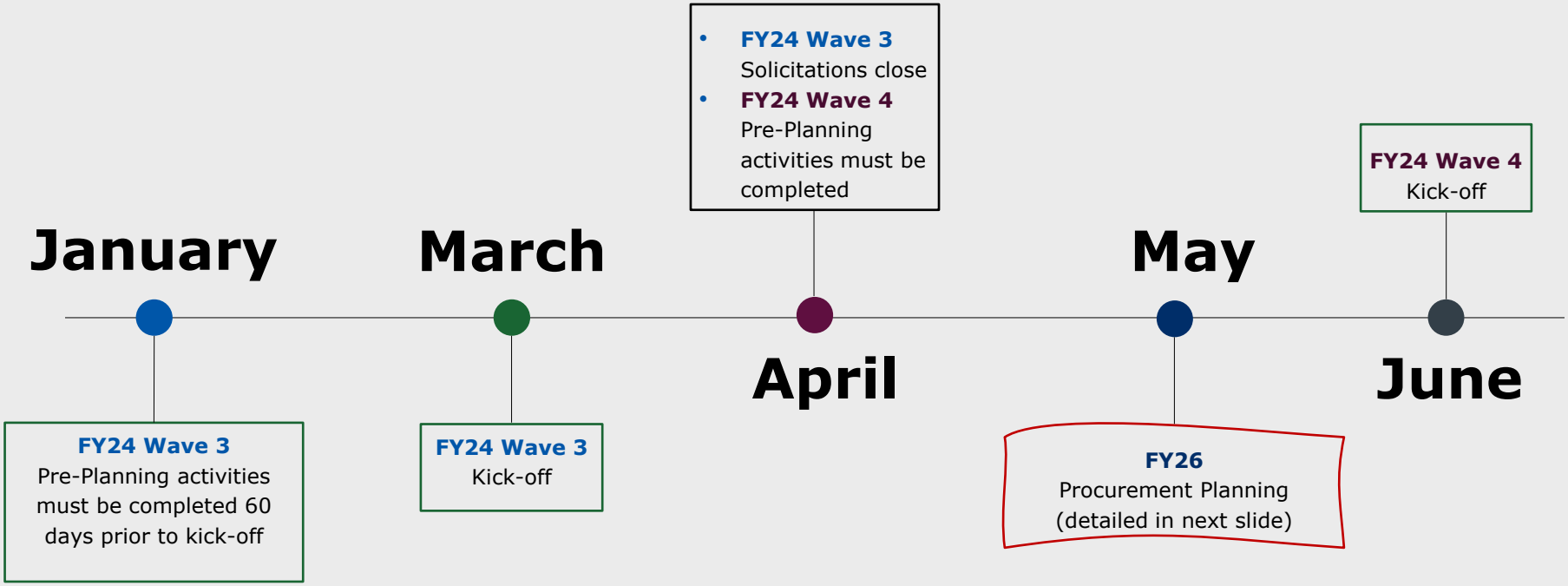


Timeline: Waves

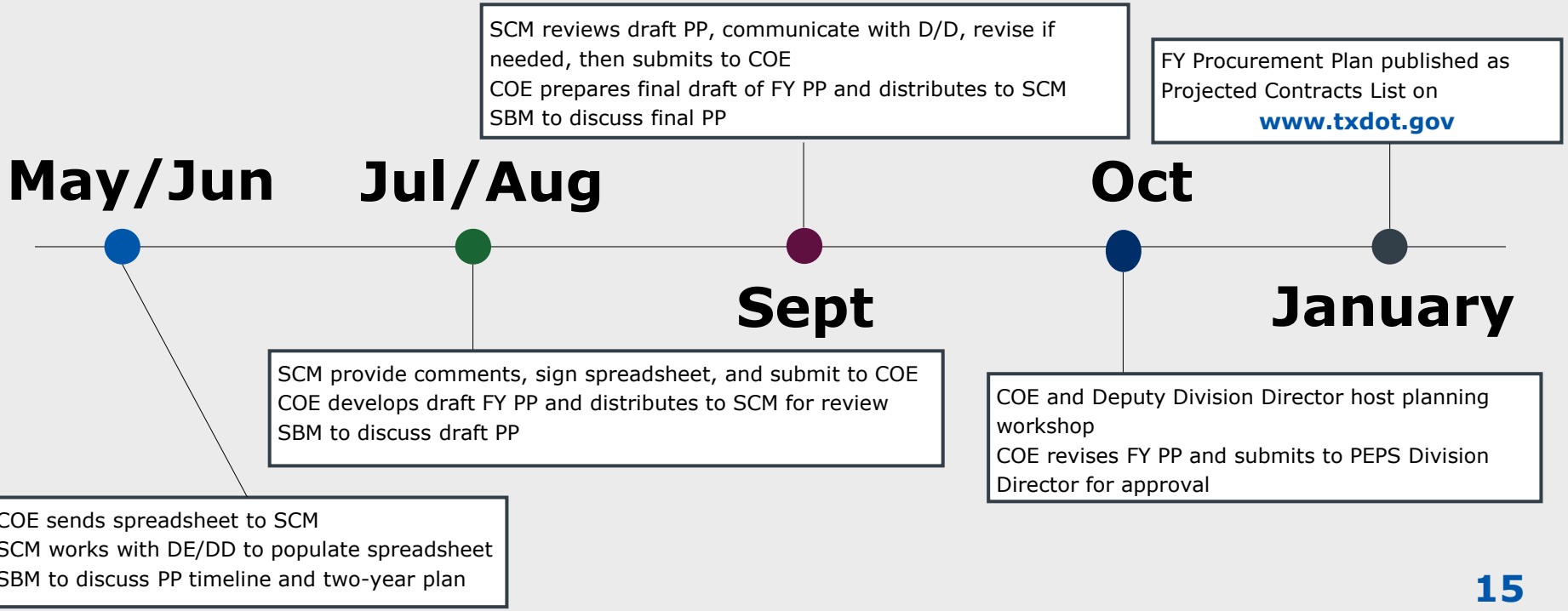
Due to the nature of long-range planning, wave activities overlap. This is an example of what that might look like.



Timeline: Waves – cont'



Timeline: FY26 Procurement Planning



PEPS Budget

FY2024 Total Allocation to DE/DD: $1.6B

- This is the most TxDOT has spent on professional services to date
- Districts and Divisions have the opportunity to spend even more

Wave Capacity fluctuates

Then:

At the time of the PEPS Conference (Dec. 6, 2023), FY25 Preliminary Plan was estimated at $1,958,500,000

Now:

FY25 Preliminary Plan includes 250 contracts with an estimated value of $2,056,500,000

Discipline of Work	Procurement Amount ($)
Bridge On/Off Replacement	$24,000,000
Comprehensive Engineering Consultant (CEC)	$120,000,000
Construction, Engineering, Inspection (CEI)	$670,000,000
CPM Scheduling Support	$12,000,000
Engineering	$24,000,000
Engineering - Other	$10,000,000
GEC/PMC	$106,000,000
Geotechnical	$20,000,000
Geotechnical Engineering (Complex)	$10,000,000
Hydraulics & Hydrology	$18,500,000
Materials Engineering	$59,000,000
Planning	$84,000,000
Plans, Specifications and Estimates (PS&E)	$441,000,000
Procurement Engineering	$30,000,000
Schematic / Environmental	$297,000,000
Surveying	$114,000,000
Traffic Engineering	$17,000,000
Grand Total	**$2,056,500,000**

RFP Basics & Avoiding DQ

Why is avoiding disqualification important to PEPS?

Your team may be the most qualified, but if your submittal is disqualified…

the CST will never know how qualified your team is.

This is a loss to you and a loss to the State.



Be Pro-active

- View the Projected Contracts List for Pre-RFP Meetings
- Ask questions about the procurement or the Specific Deliverable project
- Watch for changes in the procurement process (Addenda)
- Verify qualifications for upcoming solicitation requirements
- At RFP posting, submit all required files according to the Solicitation RFP

Provider Response Screening

The provider response (Response Package) is initially screened by the PEPS service center to determine whether the response meets the submittal requirements posted in the solicitation.

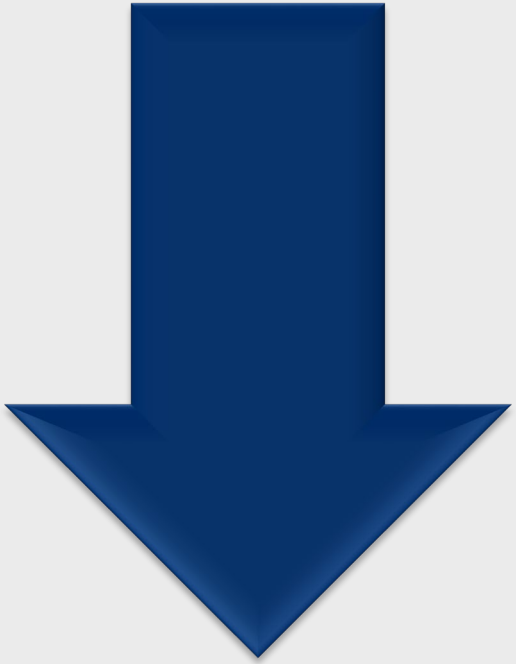
Response packages that meet these requirements are considered "responsive," included on the long list, and formally evaluated.

Response packages that do not meet these requirements are considered "non-responsive" and eliminated from further consideration.

RFP Response Package Contents

- Attachment 1: Cover Page / Questionnaire
- Attachment 2: Proposal
- Attachment 3: Project Team Composition (PTC)
- Attachment 4: Subprovider Contact Information
- Attachment 5: Non-Listed Category (NLC) Qualifications Template
- Attachment 6: HUB Subcontracting Plan (HSP) (Non-Federal)

Attachment 1: Cover Page / Questionnaire



Possible reasons for disqualification:

- Not all certification questions were answered in the affirmative
- Cover Page was not filled out completely
- Project Manager or Deputy PM requirements were not met

Attachment 2: Proposal

Be consistent, be thorough.

- Focus on quality, not quantity. Provide 1-2 successful project examples explained in detail vs. a list of 10 brief ones
- Information between Proposal and Project Team Composition (PTC) must match
- Include on each page *all* information requested in the RFP
- Do not provide false statements
- Be mindful of Preclusions and Core Team Restrictions

Evaluation Criteria – Proposal Screening

1. Technical Approach
2. Project Manager's relevant experience
3. Project management planning
4. Key staff's relevant experience
5. Past performance score

Attachment 3: Project Team Composition (PTC) form

Use legal firm names as registered with the Texas Comptroller of Public Accounts

Review and understand the Administrative Qualifications Requirements

- A new CPA audit or self-certification overhead audit must be submitted *annually*, no later than 6 months after the last day of the close of firm's financial year

Complete PTC form in CCIS, download to pdf, and upload to Bonfire.

- Data used in the PTC form will be live until it is downloaded
- Print as 11" x 17" using "Print Entire Workbook"
- Must submit as PDF, and must include all three parts

Attachment 3: Project Team Composition (Parts 1, 2, and 3)

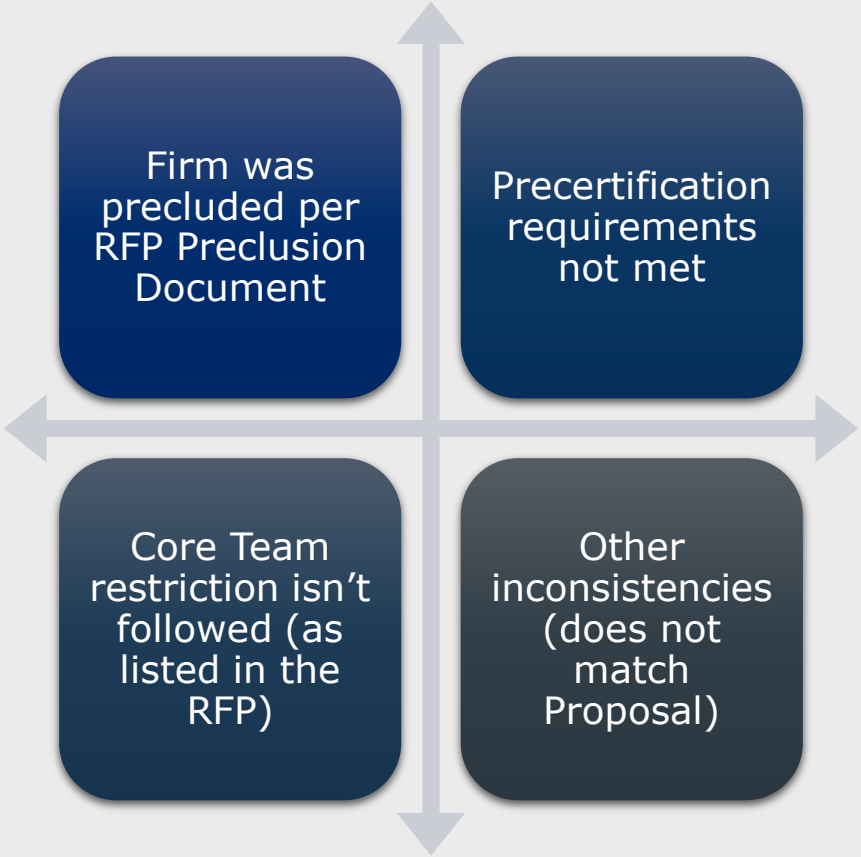
(Federal) DBE Tips:

- Goal must be met, or submittal is non-responsive
- DBE Prime Providers *can* count towards the DBE goal
- Task Leaders or Firms must be DBE certified with the applicable NAICS Code(s) for their particular work category to count towards the goal

(State) HUB Tips:

- Follow all instructions, use the HSP checklist, and sign before submittal
- Use Work Categories listed in the RFP (Subcontracting Opportunities in the HSP)
- Prime Firm *does not* count towards goal

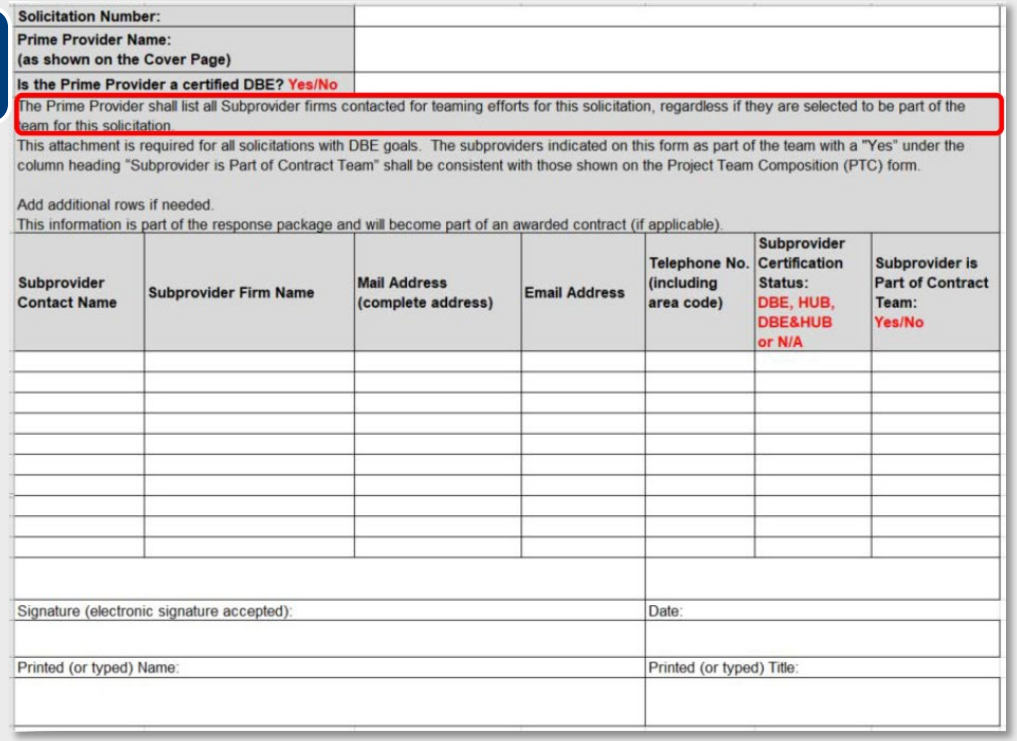
Additional disqualifications PTC-related



Attachment 4: Subprovider Contact Information

Tips:

- Submit as PDF
- All teams marked 'Yes' in last column are found on the PTC form
- Provide all firms contacted for teaming
- Ensure all information is legible and viewable in their cells
- Sign and date



Solicitation Number:	
Prime Provider Name: **(as shown on the Cover Page)**	
Is the Prime Provider a certified DBE? Yes/No	

The Prime Provider shall list all Subprovider firms contacted for teaming efforts for this solicitation, regardless if they are selected to be part of the team for this solicitation.

This attachment is required for all solicitations with DBE goals. The subproviders indicated on this form as part of the team with a "Yes" under the column heading "Subprovider is Part of Contract Team" shall be consistent with those shown on the Project Team Composition (PTC) form.

Add additional rows if needed.

This information is part of the response package and will become part of an awarded contract (if applicable).

Subprovider Contact Name	**Subprovider Firm Name**	**Mail Address (complete address)**	**Email Address**	**Telephone No. (including area code)**	**Subprovider Certification Status: DBE, HUB, DBE&HUB or N/A**	**Subprovider is Part of Contract Team: Yes/No**

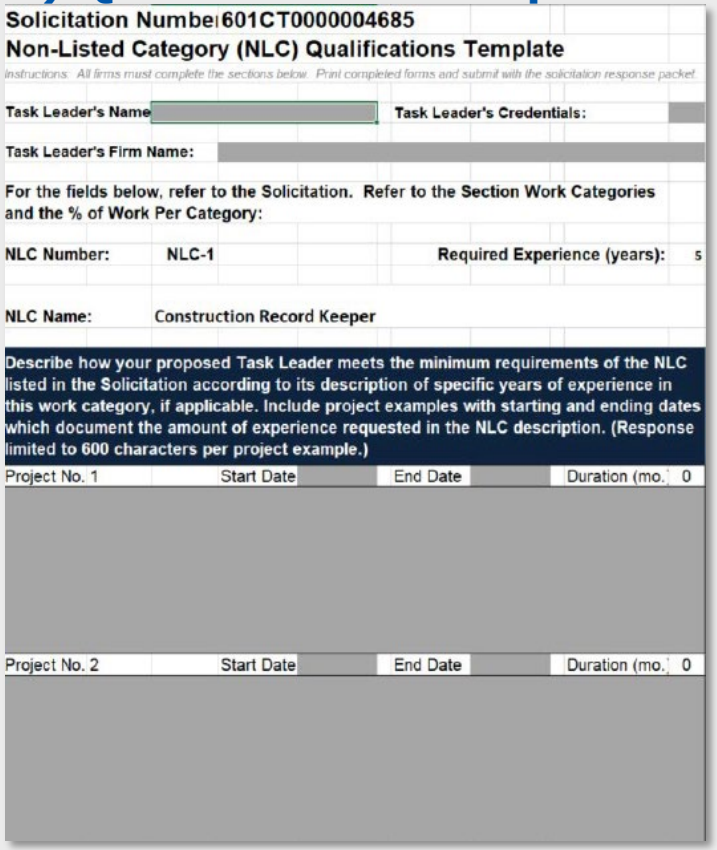
Signature (electronic signature accepted):	Date:
Printed (or typed) Name:	Printed (or typed) Title:

Attachment 5: Non-Listed Category (NLC) Qualifications Template

- Must submit as PDF
- Include experience requested in chronological order
- Check for accuracy and completeness
- Do not provide false statements

Potential Reasons for DQ:

- Task Leader lacks required years of experience, or specific experience
- Required credentials are absent
- Information is inconsistent with other attachments



Solicitation Numbe 601CT0000004685

Non-Listed Category (NLC) Qualifications Template

Instructions: All firms must complete the sections below. Print completed forms and submit with the solicitation response packet.

Task Leader's Name | Task Leader's Credentials:

Task Leader's Firm Name:

For the fields below, refer to the Solicitation. Refer to the Section Work Categories and the % of Work Per Category:

NLC Number: NLC-1 | Required Experience (years): 5

NLC Name: Construction Record Keeper

Describe how your proposed Task Leader meets the minimum requirements of the NLC listed in the Solicitation according to its description of specific years of experience in this work category, if applicable. Include project examples with starting and ending dates which document the amount of experience requested in the NLC description. (Response limited to 600 characters per project example.)

Project No. 1 | Start Date | End Date | Duration (mo.) 0

Project No. 2 | Start Date | End Date | Duration (mo.) 0

Attachment 6: HUB Subcontracting Plan (HSP)

Do not: List a firm that is not or is no longer a HUB firm

- Always check the CMBL HUB Directory; if they are not listed, they are not a HUB
- A HUB certificate does not always mean they are an **active** HUB
  - They may have recently graduated from the program or were acquired by another firm

Do not: Submit an incomplete HSP

- Make sure to complete the form using the HSP Quick Checklist as a guide

Do: Use Attachments A or B correctly

- Attachment A is for when you will meet or exceed the goal
- Attachment B is for when you do not meet the goal, but have proof of the Good Faith Effort

Do: Complete the self-performing section in detail

- Complete the self performing justification using more than just one or two sentences
- Provide details that will help explain how you will use your own employees and equipment to complete the project
- Do not include a statement that suggests that another firm is on standby and will be added later if needed

Salesforce CCIS

Benefits of PEPS Platforms

Bonfire

- Streamline procurements
- Monitor submittals
- Reduce risk and remove errors
- Ease of collaboration

Salesforce CCIS

- Automated PTC Form
- Data used remains live until firm downloads the form
- Ease of updating work categories
- Does not rely on mainframe programmers

Salesforce CCIS: a brief overview

Registration

- Access the Salesforce CCIS Community site
- Click on New User to self-register
- TxDOT will approve new user requests
- User will receive an email to complete password setup

After user registration is complete

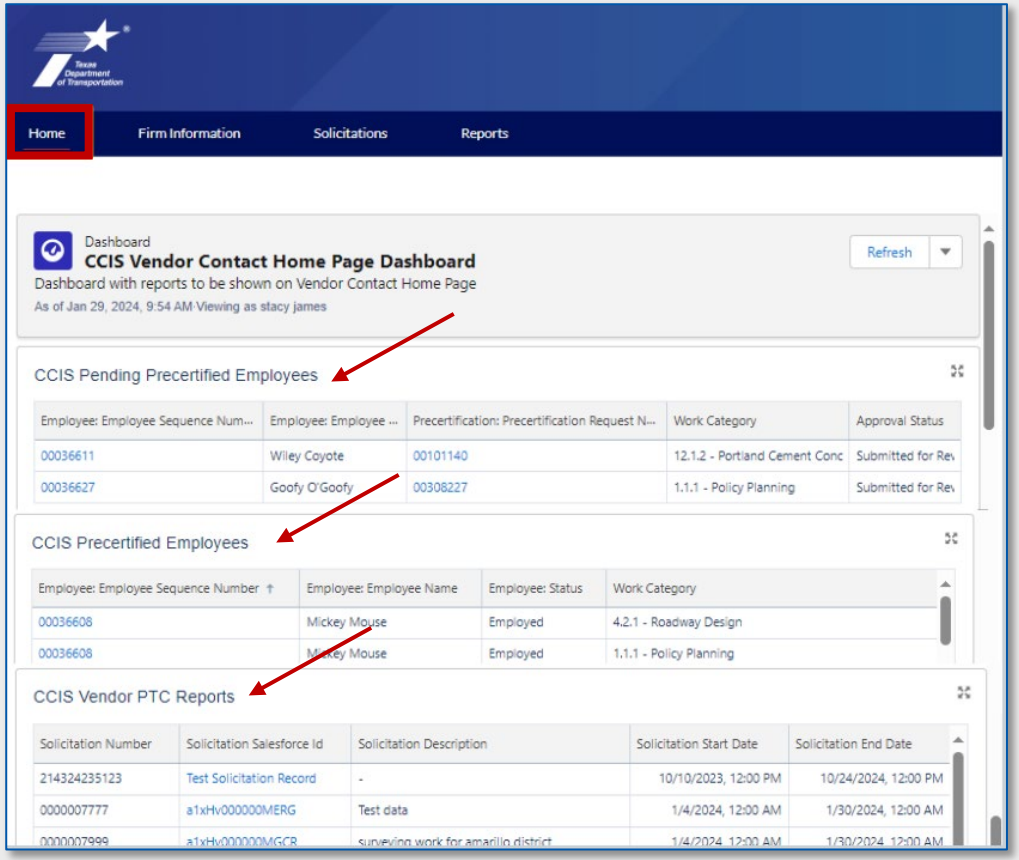
- Users will be "linked" to their firm listed on the registration form
- All users have the same level of access
- Password must be reset every 60 days
- Reminders are sent 5 & 10 days prior to expiration

Home tab and dashboards

Home tab shows dashboards for:

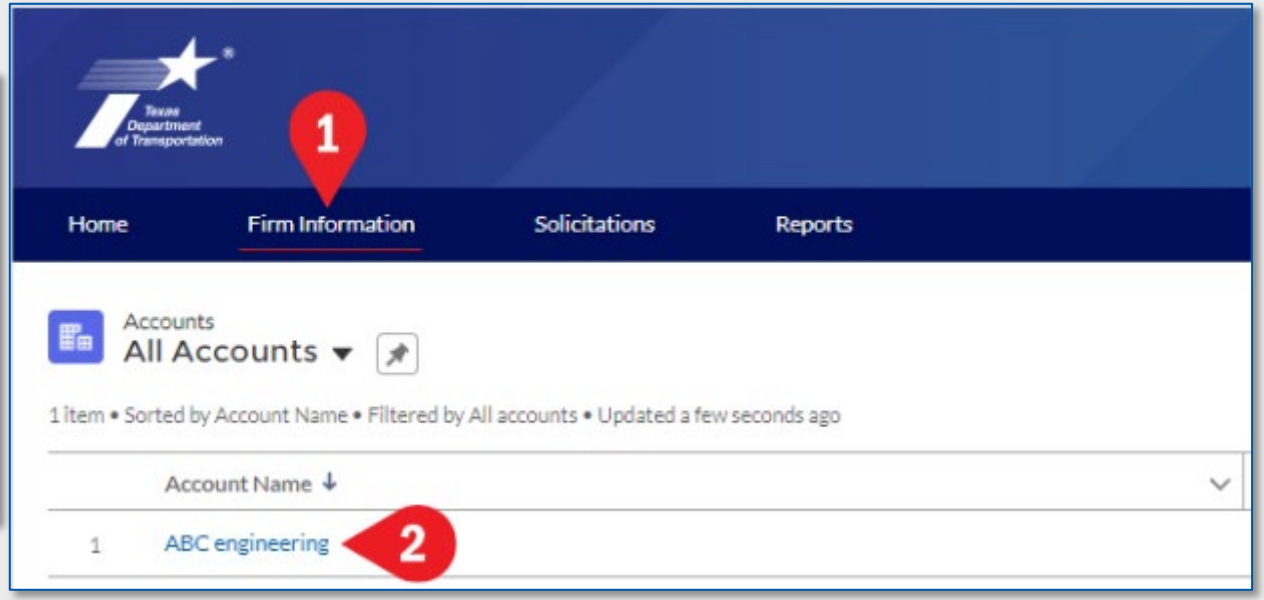
- Pending precertifications
- Precertified employees
- PTC Reports

Click on an item to see details



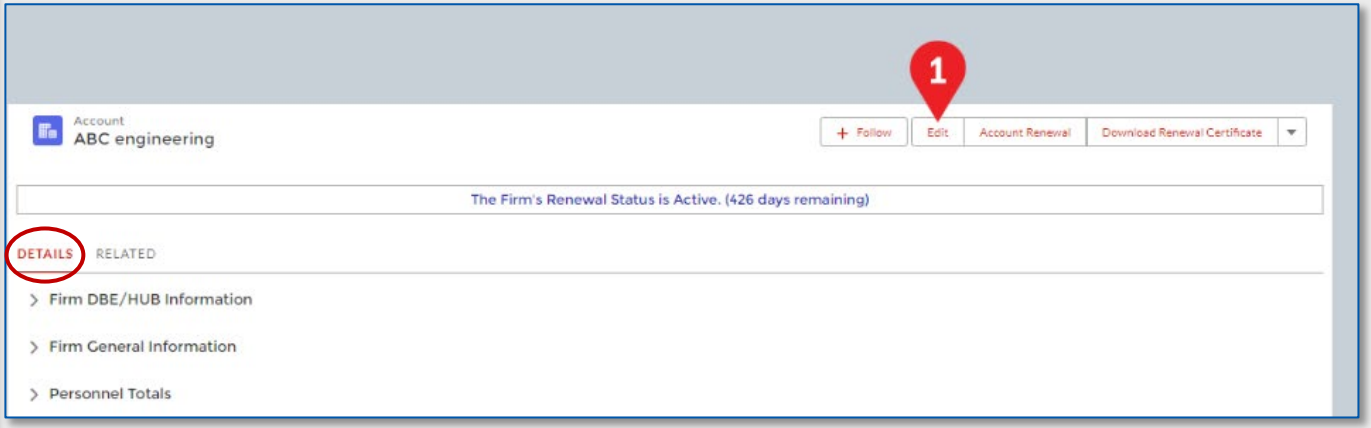
Firm information

1. Click on the Firm Information tab to view a list of accounts
2. Click on the name of the firm to open the firm details screen



Viewing firm information

1. Click on the **Edit** button to see firm information for:
   - Firm DBE/HUB information
   - Firm general information
   - Personnel totals



DBE/HUB Information section

- Click the checkbox to indicate that firm is not a HUB or DBE, otherwise:
  - Enter certification number and expiration for the certification held

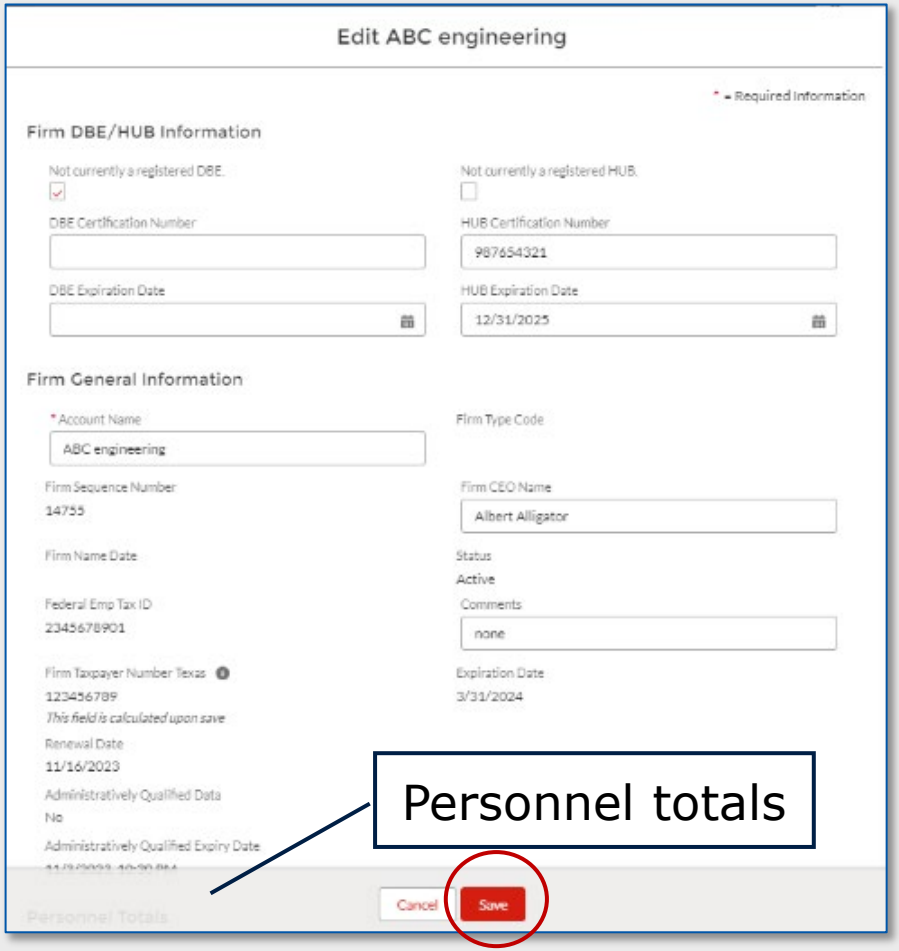
Firm General Information section

- View firm name, sequence number, taxpayer number, renewal date, AQ status and date, and firm precertification status
- Edit the Firm CEO name and add comments if necessary

Personnel Totals section

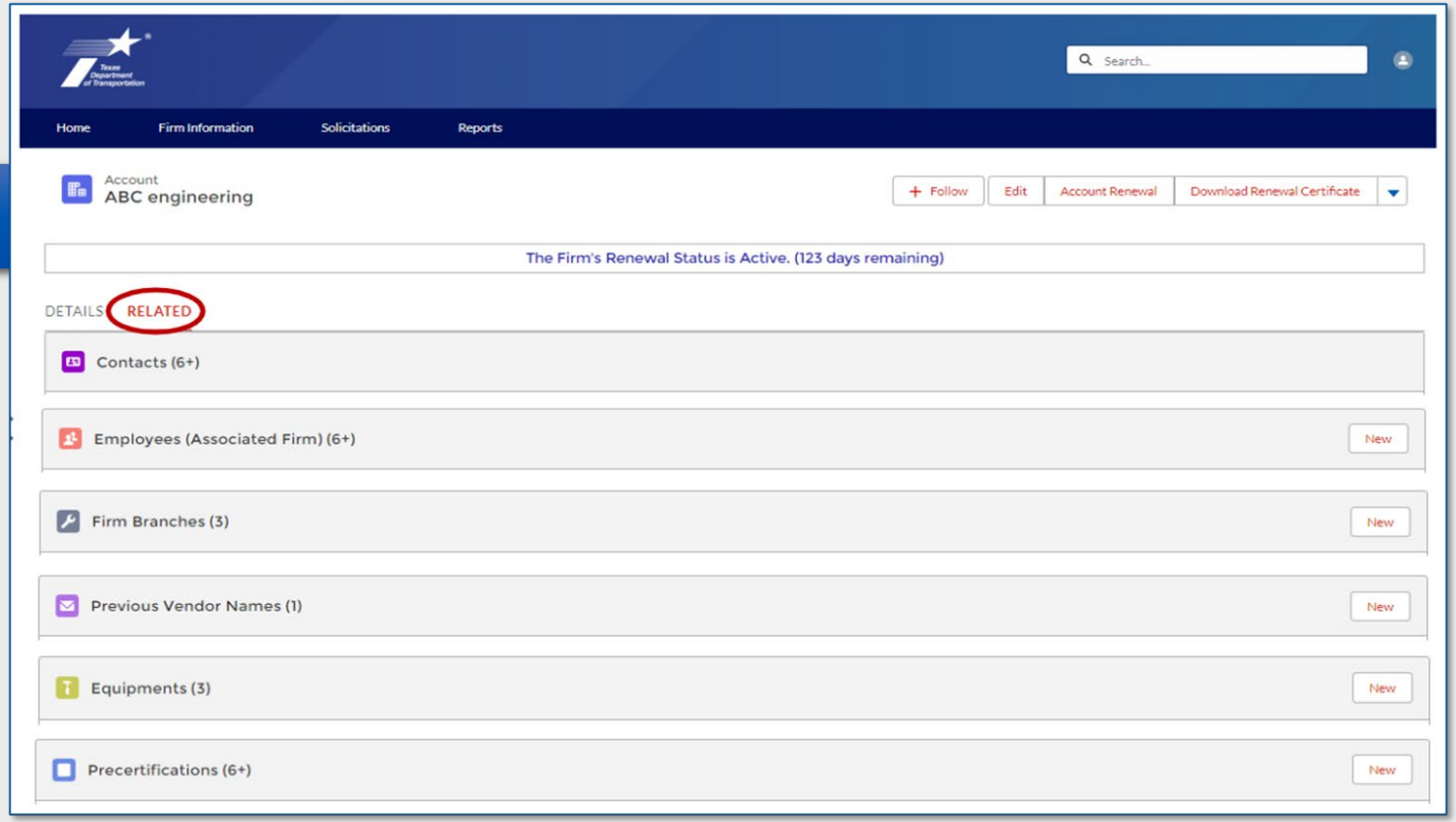
- Edit personnel numbers for total, licensed professionals, tech support staff, and other staff

To save changes, click the red save button



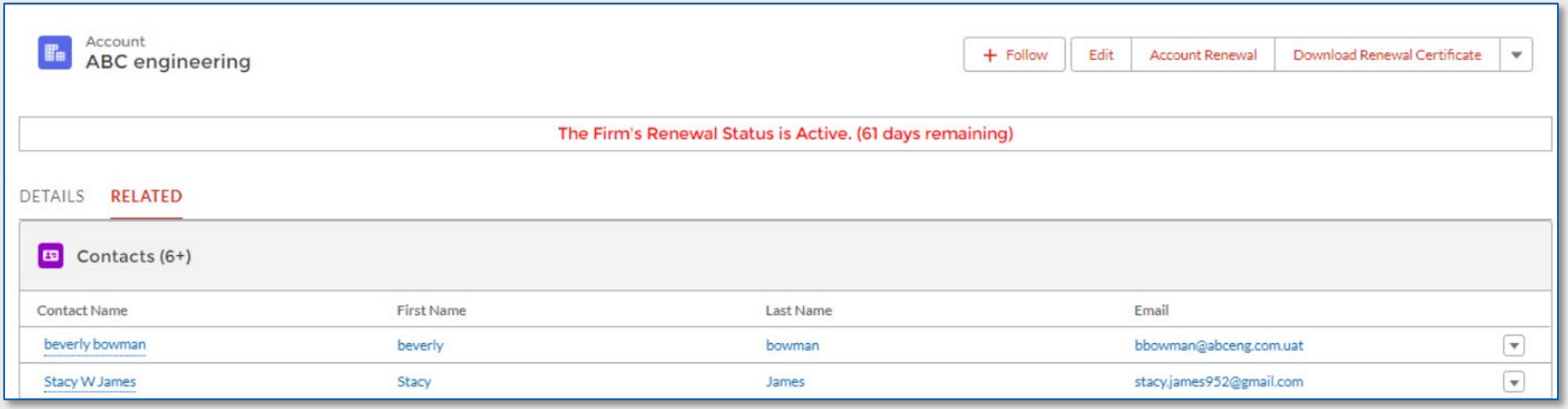
Related tab:

- Contacts
- Employees
- Firm Branches
- Previous Vendor Names
- Equipment
- Precertification



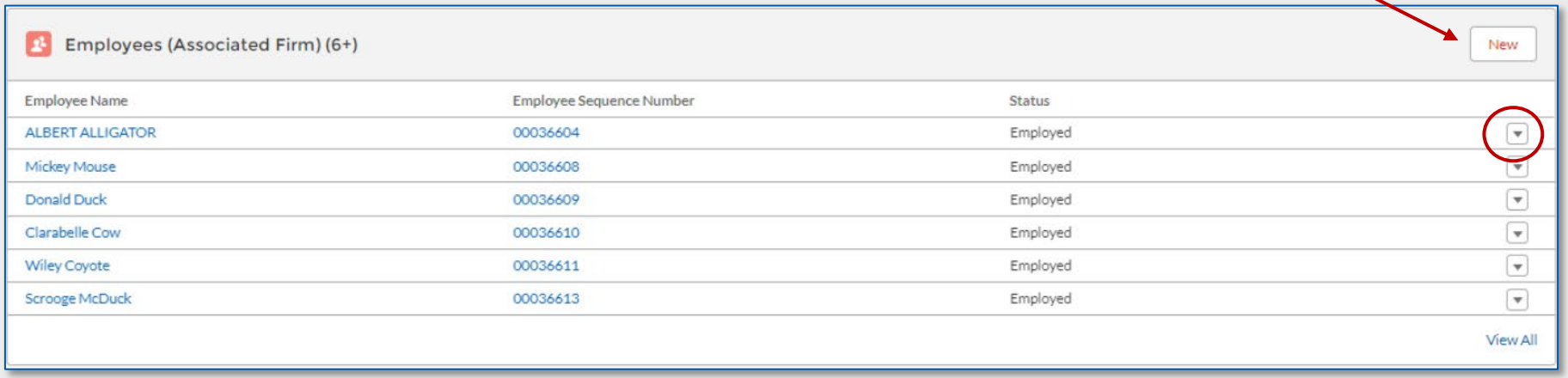
About the Contacts list:

- This list shows all users that have access to the system for the firm
- All users have the same level of access to the system
- Firms may have multiple users, but not every firm employee needs to have access
- Firms cannot delete users, but may contact PEPS to request a user be made "inactive"



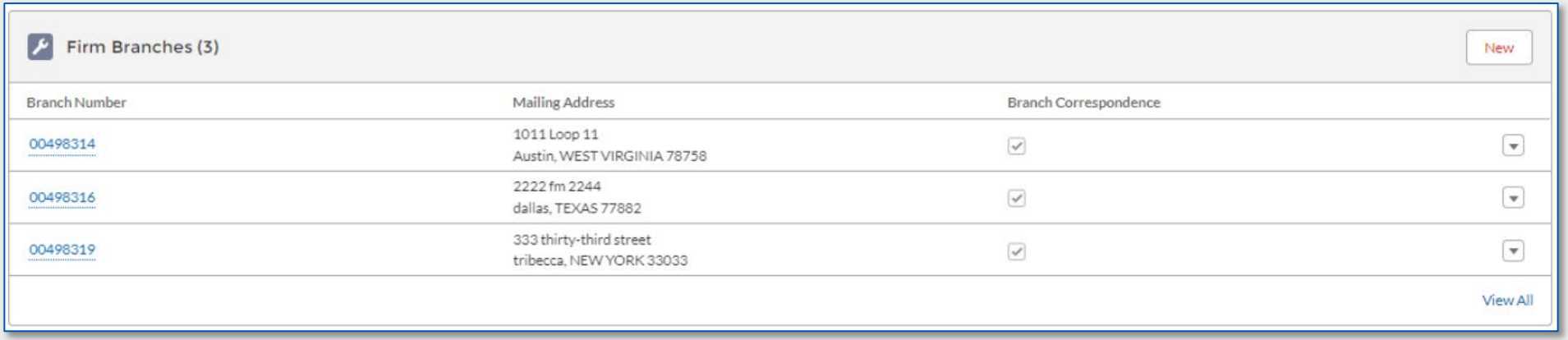
About the Employees list:

- This list shows all employees associated with the firm
- Click **New** button to add new employees who haven't been precertified before
- Contact PEPS to request a transfer if a precertified person joins your firm
- Use dropdown at the right to choose **Edit** to update employee info or mark an employee that needs to be deleted



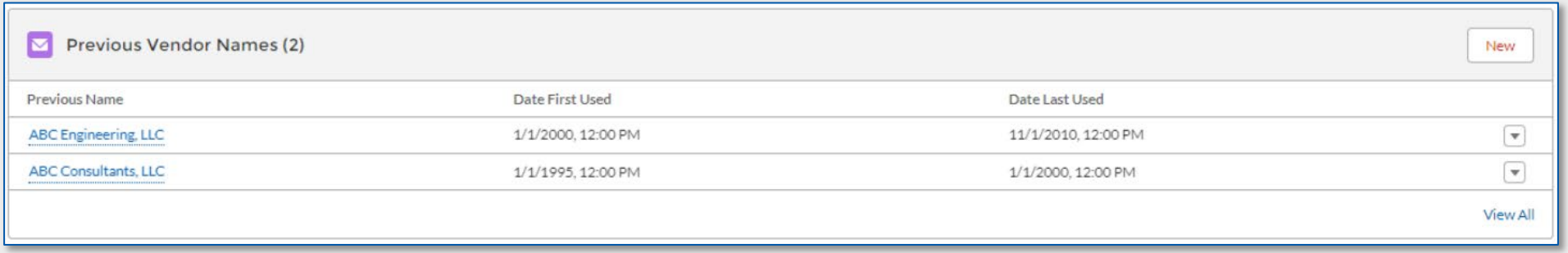
About the Firm Branches list:

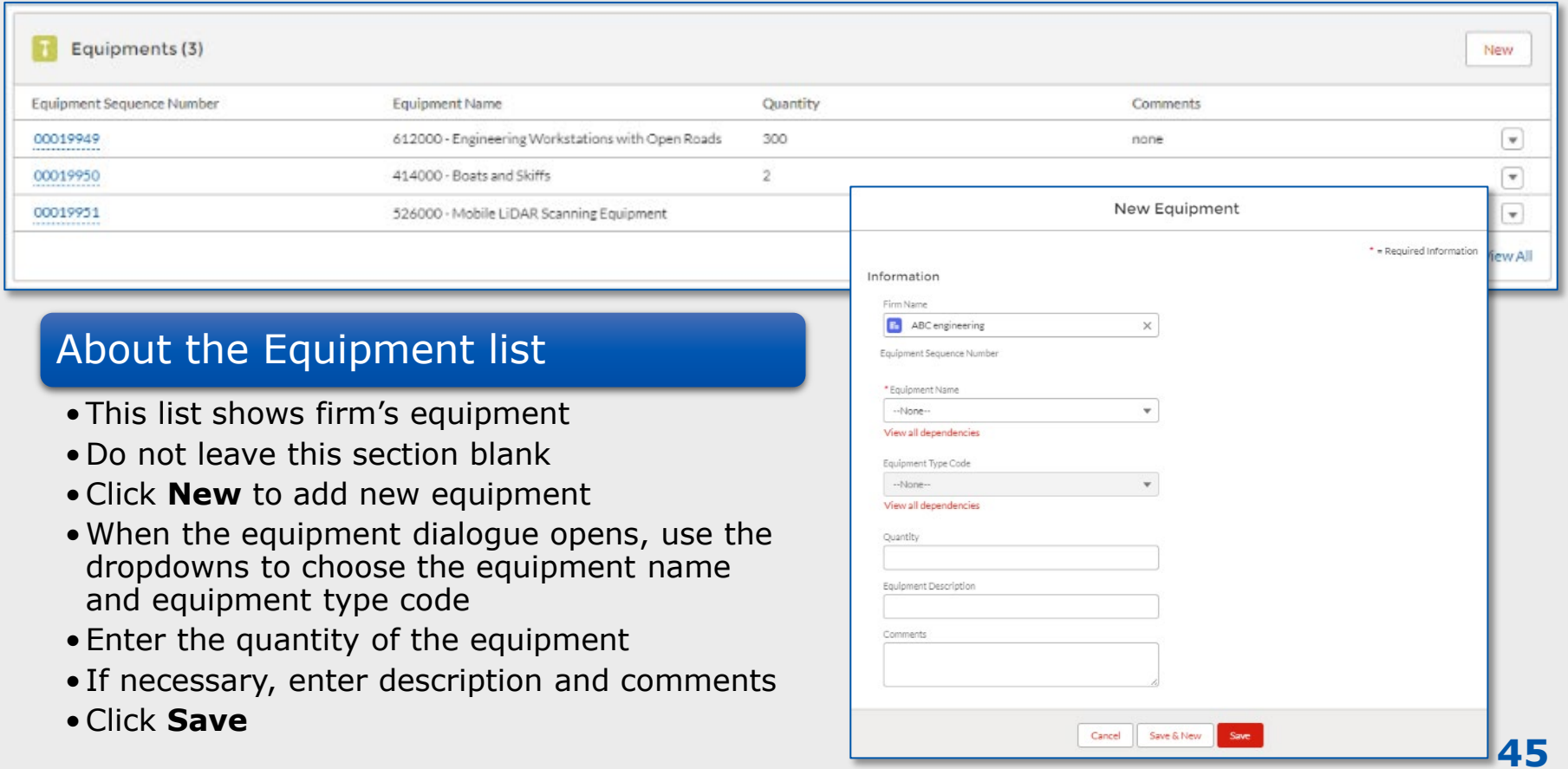
- This list shows all the firm's branches
- Click on **New** to add a branch
- Click on the dropdown and select **Edit** to update branch information or mark the branches to receive correspondence



About the Previous Vendor Names list:

- This list shows names of the firm that were used in the past
- Generally, when a firm notifies PEPS of a name change, PEPS will update this section to show the old name and dates of use



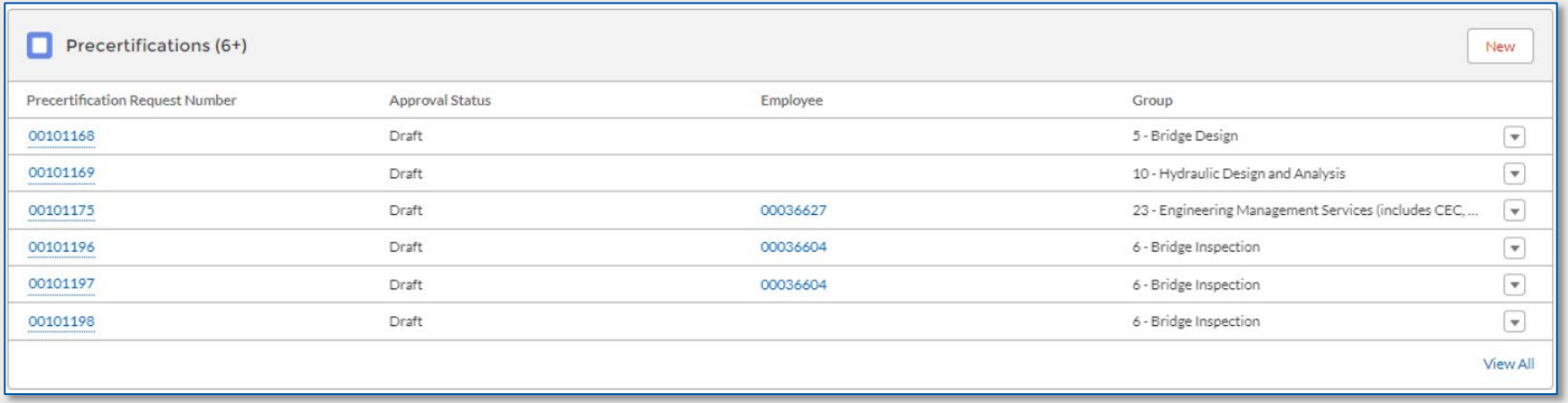


About the Equipment list

- This list shows firm's equipment
- Do not leave this section blank
- Click **New** to add new equipment
- When the equipment dialogue opens, use the dropdowns to choose the equipment name and equipment type code
- Enter the quantity of the equipment
- If necessary, enter description and comments
- Click **Save**

About the Precertifications list

- This list shows all the firm's submitted precertifications
- The list shows the approval status: *draft*, *submitted for review*, *approved*, and *denied*
- Click **New** to add a new precertification record
- Click on the precertification record number to view the details of the precertification
- Click on the dropdown to edit a precertification record



PTC in Salesforce CCIS

Fireside Chat: CCIS Roll-out

Navigate to PEPS Website

Click on Training and Events

Scroll down to Fireside Chats

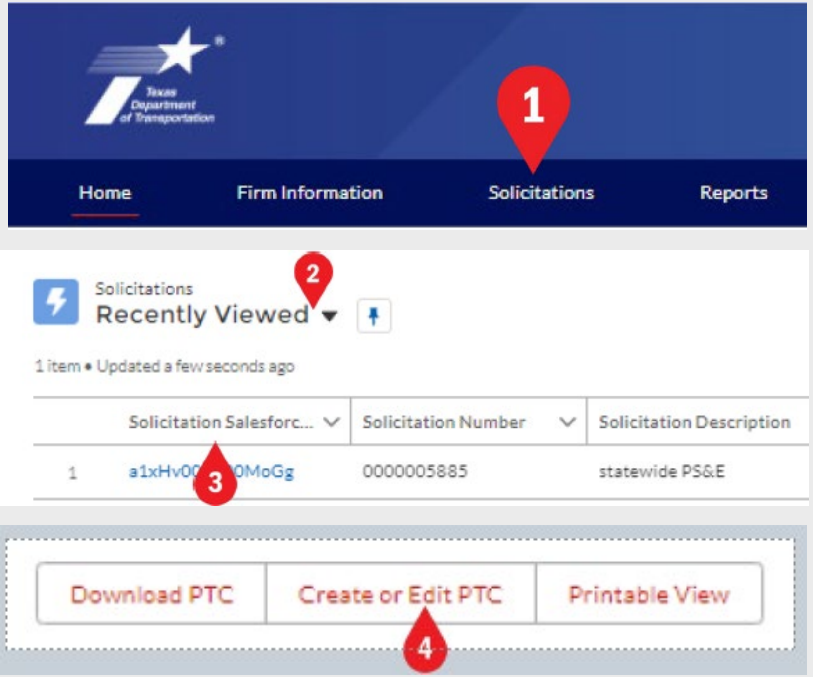
Current year (2024) is displayed

Choose the desired link within the table for *New CCIS roll out* (Presentation or Recording)

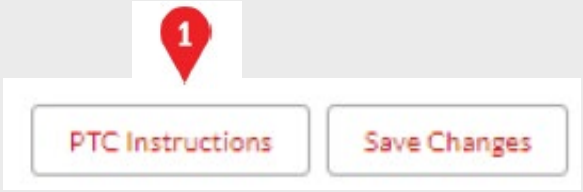
Steps for completing the PTC form in Salesforce CCIS

- PTC forms will be available in CCIS between the solicitation posting and closing dates
- To access the PTC form for a solicitation:

1. Click on the Solicitations tab
2. The list of Recently Viewed solicitations will appear. Use the dropdown to change this to All.
3. Click on the blue solicitation ID to select a solicitation.
4. When the solicitation details screen appears, click on Create or Edit PTC in the upper right corner

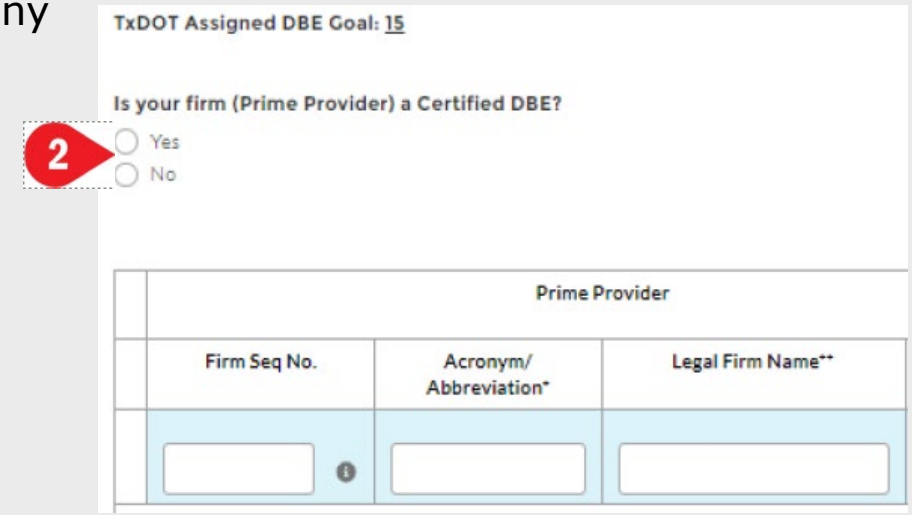


- When the PTC form opens, the PTC Form Instructions dialog will appear. Read the instructions and then click OK at the bottom of the dialog.



1. You may return to the instructions at any time by clicking the PTC instructions button located near the upper right corner of the form.

2. Choose Yes or No to show the prime firm's DBE status.



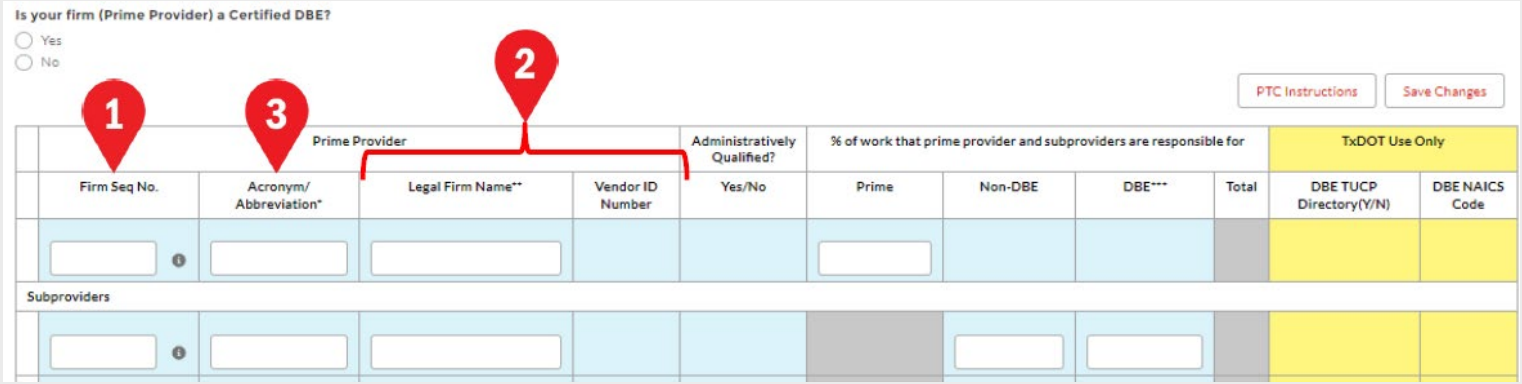
On Part 1 of the PTC form, complete the following:

1. Enter the firm's CCIS sequence number. (If the firm isn't precertified, leave this blank.)

2. The legal firm name and vendor ID fields will be populated. (If the firm isn't precertified, type in the legal firm name, as it is listed with the Texas Secretary of State and manually enter the vendor ID number.)

3. Enter a unique three-character acronym of your choice for the firm.

- To move from one field to the next, use the tab key on your keyboard or click in the field.



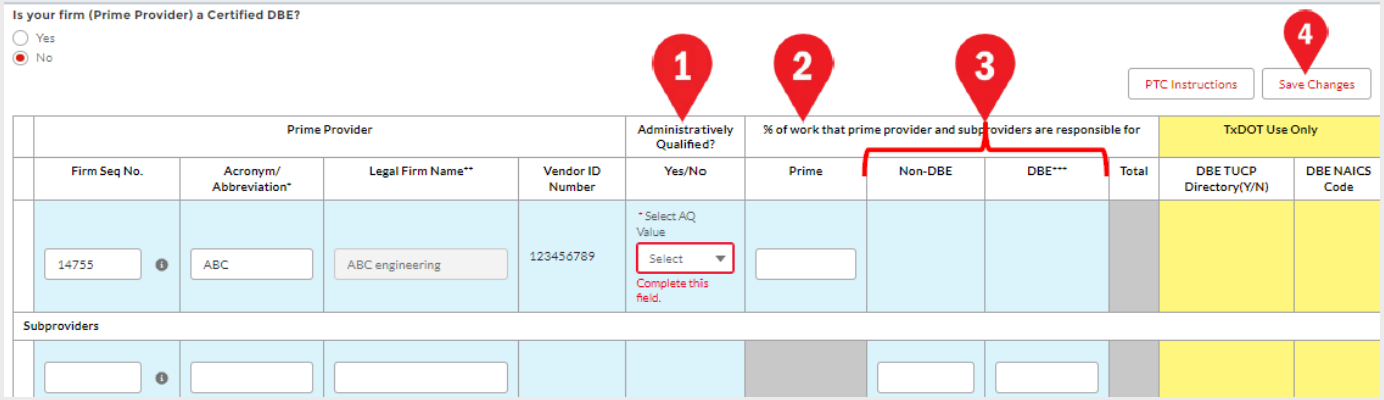
Continue filling out the PTC form as follows:

1. The Administratively Qualified (AQ) column will be populated using the AQ data that resides in the PS-CAMS system. If the firm is AQ, Yes will be shown. If the firm is not AQ, then you must use the dropdown to select the appropriate response.

2. Enter the percentage of work to be done by the prime provider (must be >30%).

3. For subproviders, enter the percentage in the appropriate Non-HUB/DBE or HUB/DBE column

4. Click Save Changes to save the data that has been entered.

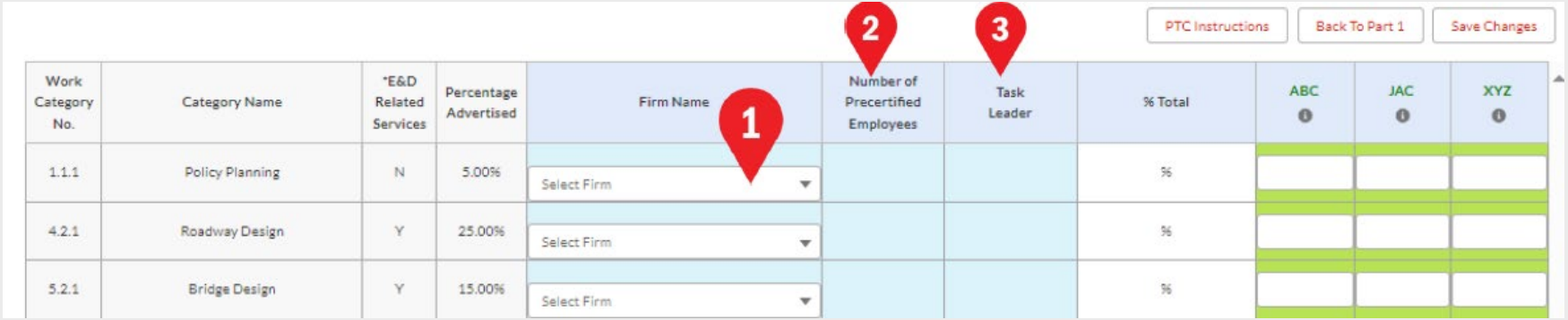


Continue filling out the PTC form as follows:

1. For each work category, use the dropdown to select the firm for that category.

2. The number of precertified employees at the selected firm will appear. If this number is zero, there are no precertified people at that firm, so you will need to select a different firm.

3. Use the dropdown to select the task leader for the category. If the dropdown doesn't appear, then there are no precertified people at the selected firm. You will need to select a different firm. (Note: leaving the task leader column blank could result in the prime firm being considered non-responsive.)



Continue filling out the PTC form as follows:

1. For each work non-listed category (NLC), use the dropdown to select the firm responsible for providing the NLC task leader. This firm must correspond to the information shown on the NLC qualifications template. (Note: leaving the firm name column blank could result in the prime firm being considered non-responsive.)

2. Type in the name of the NLC task leader. This must correspond to the information shown on the NLC qualifications template. (Note: leaving the task leader column blank could result in the prime firm being considered non-responsive.)



Continue filling out the PTC form as follows:

1. Note that for each category and NLC, the form shows whether the category is an E&D service (Y), not an E&D service (N), or an exempt service (E).

2. The form also shows the percentage advertised for each category and NLC.

3. The percent total on each row must match the percentage advertised. If not, this cell turns red.

4. Each column represents one of the firms listed on part 1 of the PTC form. In these columns, you can hover over the grey circle below the acronym to see the full name of the firm. Enter percentages for each firm that will be performing work on the category.



Work Category No.	Category Name	*E&D Related Services	Percentage Advertised	Firm Name	Number of Precertified Employees	Task Leader	% Total	ABC	JAC	XYZ
1.1.1	Policy Planning	N	5.00%	14755 - ABC engineering	2	00036608 - Mickey Mouse	%			
4.2.1	Roadway Design	Y	25.00%	14755 - ABC engineering	4	00036608 - Mickey Mouse	%			
5.2.1	Bridge Design	Y	15.00%	14757 - Jackal & Associates, Inc.	0		%			

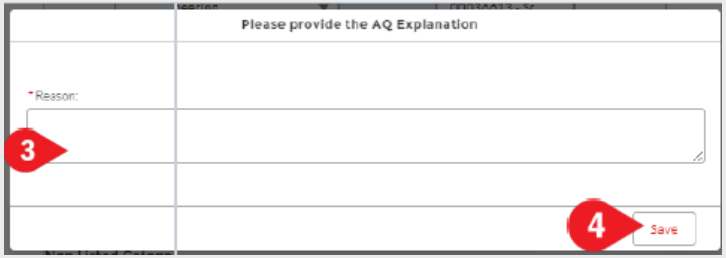
Continue filling out the PTC form as follows:

1. If the % Total doesn't equal the Percent advertised, the cell will turn red.

2. As you fill in percentages, if a non-AQ firm is assigned to an E&D category, the field will be highlighted with red.

3. In addition, a dialog box will appear, and you must enter an explanation for why a non-AQ firm is assigned to an E&D category.

4. Click Save to save your AQ explanation.

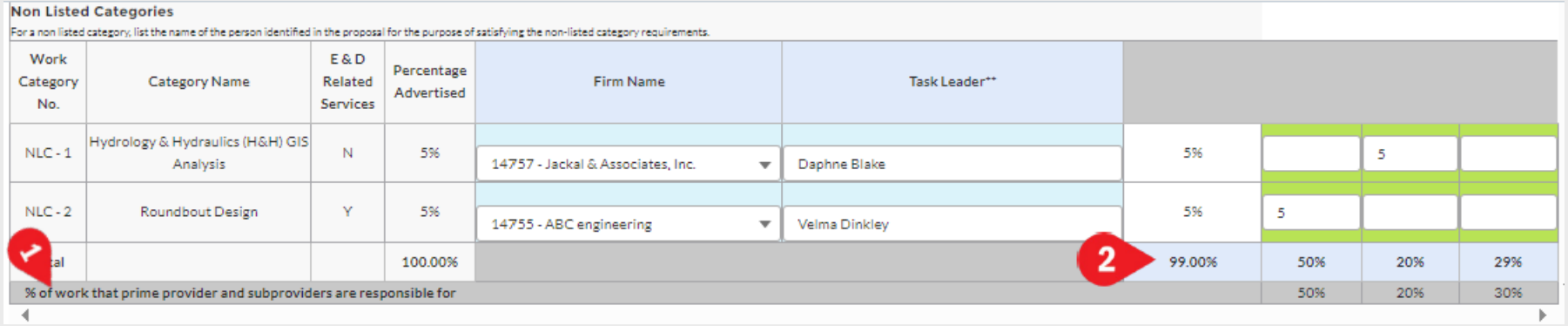


Number of Precertified Employees	Task Leader	% Total	ABC	JAC	XYZ
2	00036608 - Micke	4%	4		
4	00036608 - Mickey Mouse	25%	15		5
0		15%	5	10	
2	00036613 - Scrooge McDuck	10%	10		
4	00036611 - Wiley Coyote	10%	6		4
1	00036627 - Goofy O'Goofy	5%	5		
1	00036608 - Mickey Mouse	10%			10
3	00036627 - Goofy O'Goofy	10%			10
Task Leader**					
Daphne Blake		5%		5	
Velma Dinkley		5%	5		
		99.00%	50%	20%	29%
			50%	20%	30%

Continue filling out the PTC form as follows:

1. Across the bottom of the table, there is a grey row that shows the % of work that the prime provider and subproviders are responsible for. This is the percentage that was entered on part 1 of the form.

2. In the blue row at the bottom of the table, the total for each column is shown. The user must verify that the column total in the blue row matches the percentage shown in the grey row.



Non Listed Categories

For a non listed category, list the name of the person identified in the proposal for the purpose of satisfying the non-listed category requirements.

Work Category No.	Category Name	E & D Related Services	Percentage Advertised	Firm Name	Task Leader**				
NLC - 1	Hydrology & Hydraulics (H&H) GIS Analysis	N	5%	14757 - Jackal & Associates, Inc.	Daphne Blake	5%		5	
NLC - 2	Roundbout Design	Y	5%	14755 - ABC engineering	Velma Dinkley	5%	5		
tal			100.00%			99.00%	50%	20%	29%
% of work that prime provider and subproviders are responsible for							50%	20%	30%

Continue filling out the PTC form as follows:

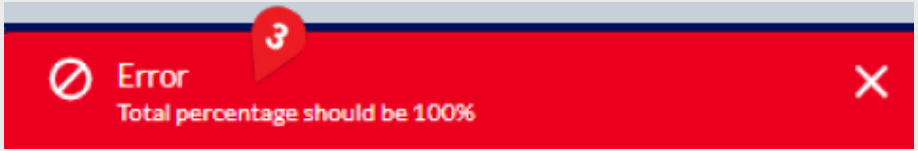
1. At any time, you may click the Save Changes button to save your PTC form.

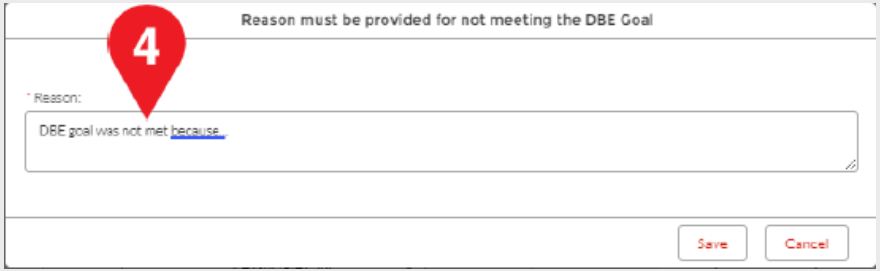
2. When the PTC form is complete, click the Complete button at the top of the form.

3. The form will validate the data and show a red error message if there is a problem. In this example, the total percentage did not equal 100%. Correct the error, save the changes, and hit the Complete button again.

4. If the assigned DBE or HUB goal is not being met, a dialog box will appear. Enter an explanation in the reason field and click on the Save button.







Steps for downloading the PTC form:

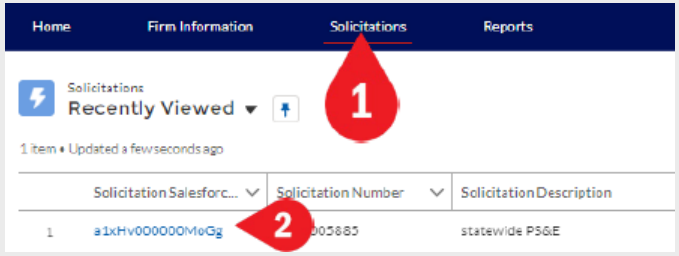
1. Click on the Solicitations tab

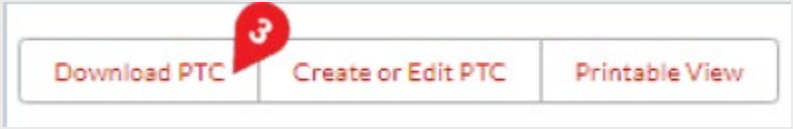
2. Select the completed PTC form.

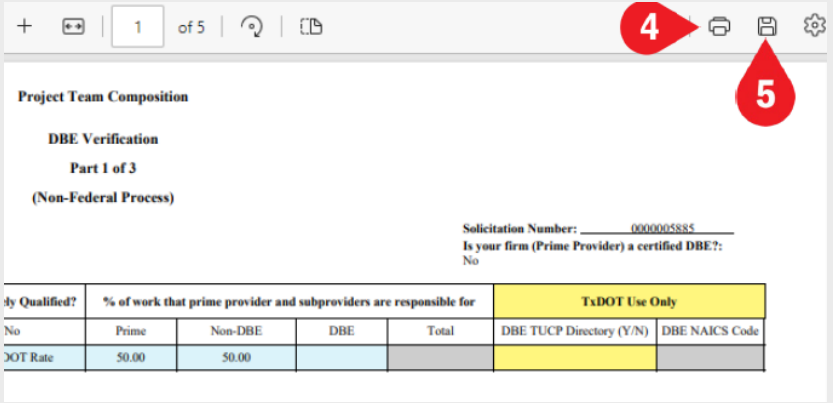
3. When the solicitation details screen opens, click on the Download PTC button.

4. The PTC form will be displayed on the screen. If desired, click on the printer icon to print the form.

5. Click on the diskette icon to save the PDF copy of the form.







Note: the PDF version of the PTC form must be uploaded to Bonfire with the rest of the proposal package.

Absorbing the Debrief

Overview: PEPS Debrief

1.
- May be requested after proposal evaluation & notification
- Up to 4 months after contract execution

2.
- Target duration is 30 minutes, up to 60 minutes, max
- Notes in preparation are the only material allowed

3.
- Notes may be taken during debrief
- Video/Audio recording is not permitted

The PEPS Debrief

The debrief provides the opportunity to share information about a specific procurement in a planned, controlled, and formal environment

An efficient debrief will focus on the key areas where improvement could have made a difference in the scoring of a response

A formal debrief does not waive the protection of the open records act; information approved to be provided is detailed in PEPS Policy for debriefs

PEPS Debrief

What it is:

- An opportunity to provide factual information about the performance of the provider
- A meeting which aims to improve future responses
- A chance to provide general response expectations for topics
- A discussion of trends that impacted the selection

What it is not:

- An avenue to appeal the decision
- An opportunity to clarify any part of the submittal
- A review of all Proposals and scores
- A discussion which includes every aspect of scoring

The End

Jaime A. Vela, Jr., P.E.

Questions & Contact Info

