



# Timely Communication & Coordination 2023 PEPS Conference

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# HELP #EndTheStreakTX

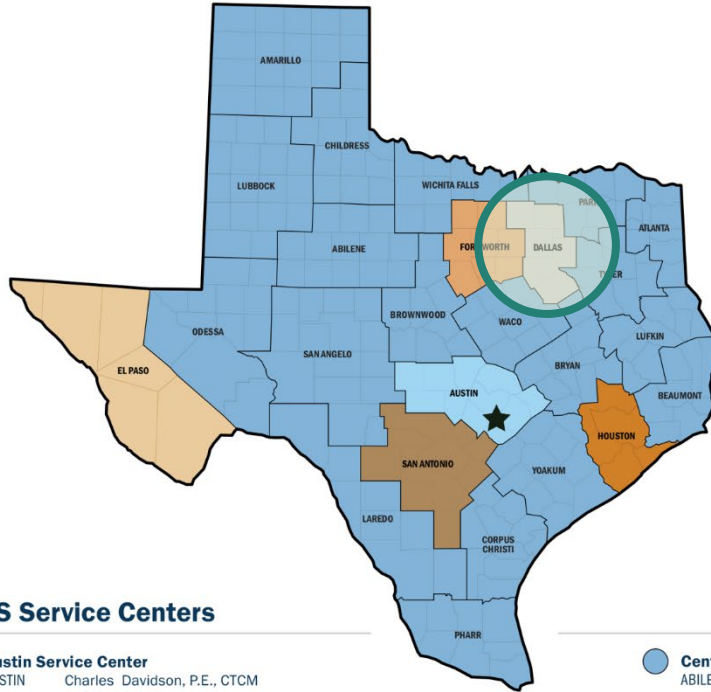
End the streak of daily deaths on Texas roadways.

[TxDOT.gov](https://www.txdot.gov) (Keyword: #EndTheStreakTX)



#EndTheStreakTX Toolkit





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# Timely Communication



Boss: “When do you need this by?”



Customer: “Yesterday!”



The team’s reaction.



To be early is to  
be on time.



To be on time is  
to be late.



To be late is to  
be absent.

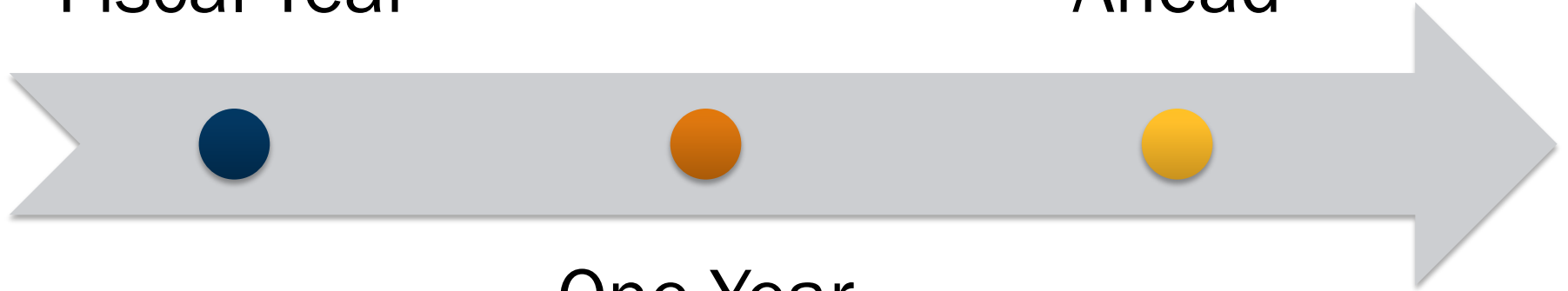
# Timeline of Contract Needs



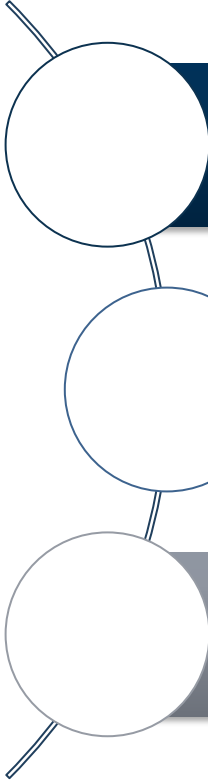


Current  
Fiscal Year

Two Years  
Ahead



One Year  
Ahead

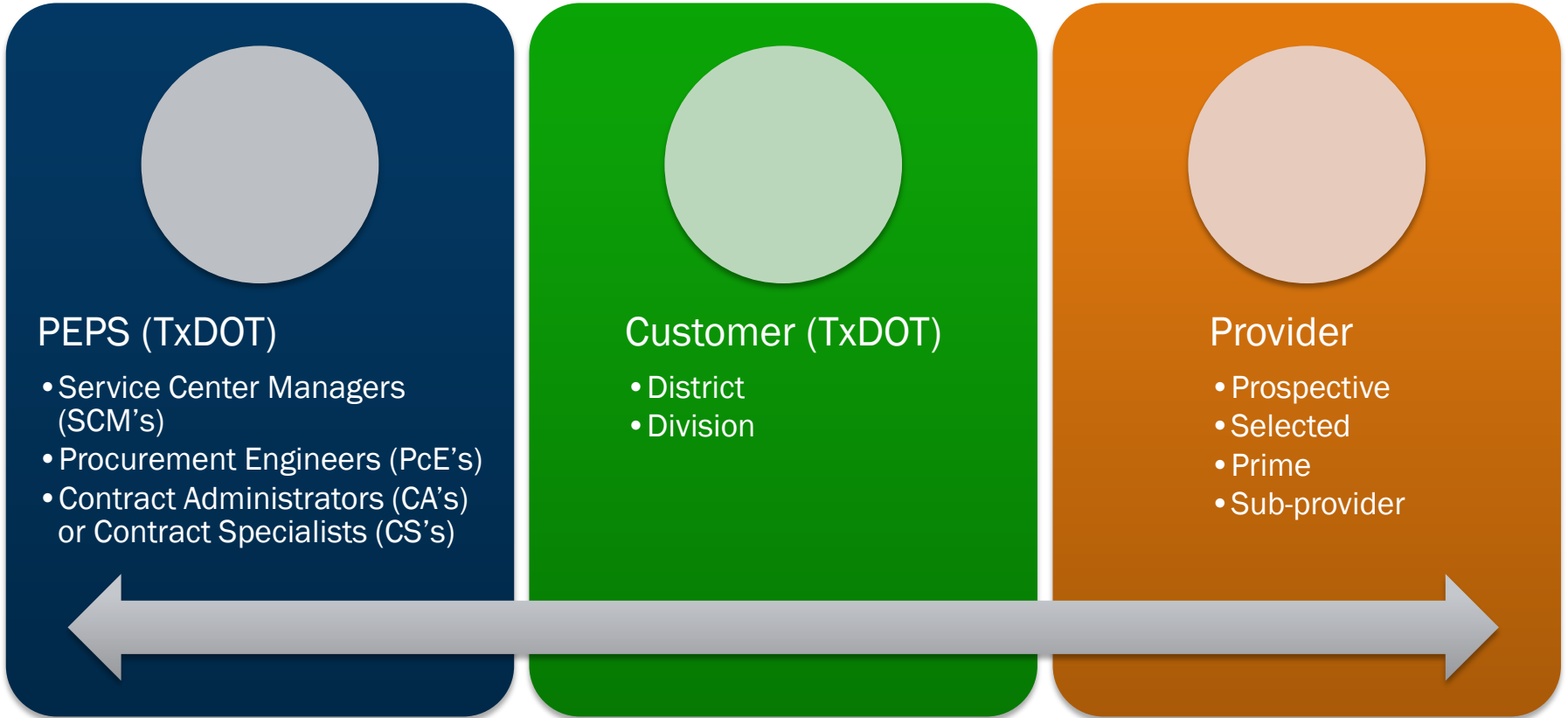


For Indefinite Deliverable (ID) contracts, the burn rate could be sooner than the contract life cycle (example: Plans Specifications & Estimate contracts or Schematic Environmental may be needed every 18 months).

For some, the contract life cycle helps determine when the next indefinite deliverable contracts are needed (example: Utility Engineering, Geotechnical Engineering, or Material Engineering may be needed every 3 or 4 years).

For Specific Deliverable (SD) contracts, these are dependent on the specific project schedule.

**Note:** The example provided is not reflective of each process and is subject to change.





Posted 1 year in advance and might have future revisions.

- District/Division Customer might adjust
- Prospective Providers start looking at availability and planning

6 months prior to the procurement

- District/Division considering Consultant Selection Team (CST)
- Providers work on teaming opportunities (process goals)

3 months prior to the procurement

- District/Division have determined the CST
- Providers verify they meet minimum qualifications

Procurement Kickoff

- Sorry! It may be too late!

# Communicating Procurement Needs



# Keep in mind, we all want...



A successful procurement



To finish ahead of schedule



To clearly understand & be understood





# Procurement Challenge Examples

Preclusions

Unique Non-  
listed  
Categories

Difficulties  
meeting  
requirements

Changes to  
the schedule

# Development of the Procurement and Contract(s)



Request for Proposal (RFP) Number	PeopleSoft RFP Number	Process Type	Contract Type	With or Without Work Authorizations (WA's)
Payment Types	Control Section Job (CSJ) numbers	Project Limits	Estimated Letting Date	Estimated Construction Cost
Estimated Right-of-way (ROW) Cost	Preclusions	Deputy Project Manager	Work Category Task Leaders invited to the Interview	Potential Conflicts of Interest & Mitigation
Non-Disclosures	Risk Analysis	Negotiation Factors	Disadvantaged Business Enterprise (DBE) goal	Historically Underutilized Business (HUB) goal

# Procurement Planning



## PEPS

- Service Center Manager's verify Wave procurements
- Availability of Procurement Engineers
- Requesting verification of General Council Division (GCD) mitigation strategies

## Customer

- Consultant Selection Team (CST) Members who have taken CTR620 within 5 years
- Confirming Wave procurements
- Reviewing CST's potential Conflict of Interest (COI)

## Potential Providers

- Meeting with Service Center Managers or Potential Customers
- Securing Teaming Opportunities
- Reviewing previous lessons learned

# Pre-kickoff & Procurement

# PEPS Procurement Tasks & Working Days per Task



	Assign PcE and enter PSCAMS data	Verify PSCAMS data/assign PeopleSoft	Contact CST Members	Scope Development	Prepare for ITD	Prepare for Kickoff	Total Working Days
Planning (Pre-Kickoff) Process	5	5	5	10	10	10	45

Professional Services Contract Administration Management System (PS-CAMS)  
Information Technology Division (ITD)

Note: The example provided is not reflective of each process and is subject to change.





## PEPS

Entering procurement data into PS-CAMS

Submitting ITD review forms

Offsetting schedules (for multiple procurements of the same discipline or for Screener availability)

Posting Pre-RFP Meetings and working with their Customer to develop the Pre-RFP Presentation

## Customer

Signing CST up for CTR620 training if needed

Submitting procurement scopes

Providing Preclusion Information

Working with PEPS to develop the Pre-RFP Presentation

## Potential Providers

Watching the Projected Contracts List for Pre-RFP Meetings

Asking questions about the procurement or SD project

Listening for changes in the procurement process

Verifying qualifications for upcoming solicitation requirements

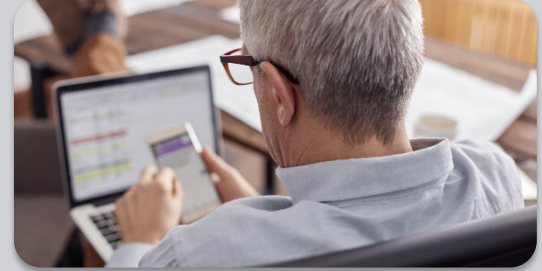
# PEPS Procurement Tasks & Working Days per Task



Contract Type/With or Without Interviews (federal and non-federal)	Task						Total Working Days
	RFP Creation and Posting	RFP Advertising	Evaluation and Selection	Rate Negotiation	LOE Negotiation	Execution	
	Work Days (skipping Holidays)	Week Days (including Hoidays, 21 Calendar Days)	Work Days (skipping Holidays)	Work Days (skipping Holidays)	Work Days (skipping Holidays)	Work Days (skipping Holidays)	
Indefinite Deliverable without Interview	12	15	13	10	-	30	80

## Level of Effort (LOE)

Note: The example provided is not reflective of each process and number of contracts and is subject to change.



## PEPS

- Provides guidance
- Develops RFP material
- Screens Statement of Qualifications (SOQ's)
- Ensures Quality Control
- Develops Preliminary Contract Documents

## Customer (CST)

- Follows outlined procurement guidance
- Develops RFP material
- Develops evaluation material
- Evaluates proposals

## Potential Providers

- Watches for RFP postings
- Asks questions during the Question & Answer period
- Watches for Addenda
- Submits all required files according to the Solicitation RFP

# Post Procurement & Contract Management



## PEPS

- Negotiating rates
- Developing contract documents
  - Business Case Memo (BCM)
  - Risk Analysis (RA)
  - ITD coordination
  - Reviewing files for accuracy
- Developing debrief material & scheduling meetings

## Customer

- Verifying job classifications
- Signing Nepotism forms
- Negotiating LOE & Schedule if applicable
- CST may continue to provide support for debrief material

## Providers

- Selected
  - Verifying job classifications
  - Negotiating rates
  - Submitting requested information
- Patiently waiting for group and individual debriefs



## Contract Management

- Work Authorizations (WA's)
- Supplemental Agreements (SA's)
- Supplemental Work Authorizations (SWA's)
- Invoices

### PEPS

- Provides guidance
- Processes necessary documents
- Quality Assurance / Quality Control (QA/QC's)

### Customer

- Negotiates level of effort & QA/QC documents
- Communicates project needs & evaluates work
- Manages HUB or DBE goal

### Providers

- Negotiates level of effort & QA/QC documents
- Verifies project expectations & manages client care
- Manages HUB or DBE goal



# Best Practices & Lessons Applied



Communicate often

Ask & verify



Be adaptable

Constantly improving



Show grace

Apply lessons learned to improve



The more you communicate, the quicker you reach a resolution.



Being realistic and honest is the best way to move forward.



Work together to improve the process.

# Outlets for Improvement



## PEPS

- Meetings
- Procurement Engineers
- Contract Specialists
- Strategy Board Meeting topics via your Service Manager

## Customers

- PEPS Division Director Martin Rodin & Deputy Division Director Lucio Vasquez
- Service Center Manager or Support Center Managers
- Statewide Transportation Planning & Development (TP&D) Director's Meeting

## Potential Providers

- American Council of Engineering Companies (ACEC)
  - Focus Groups
- DRIVE Program
- PEPS Conference!

# Questions and Discussion







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