

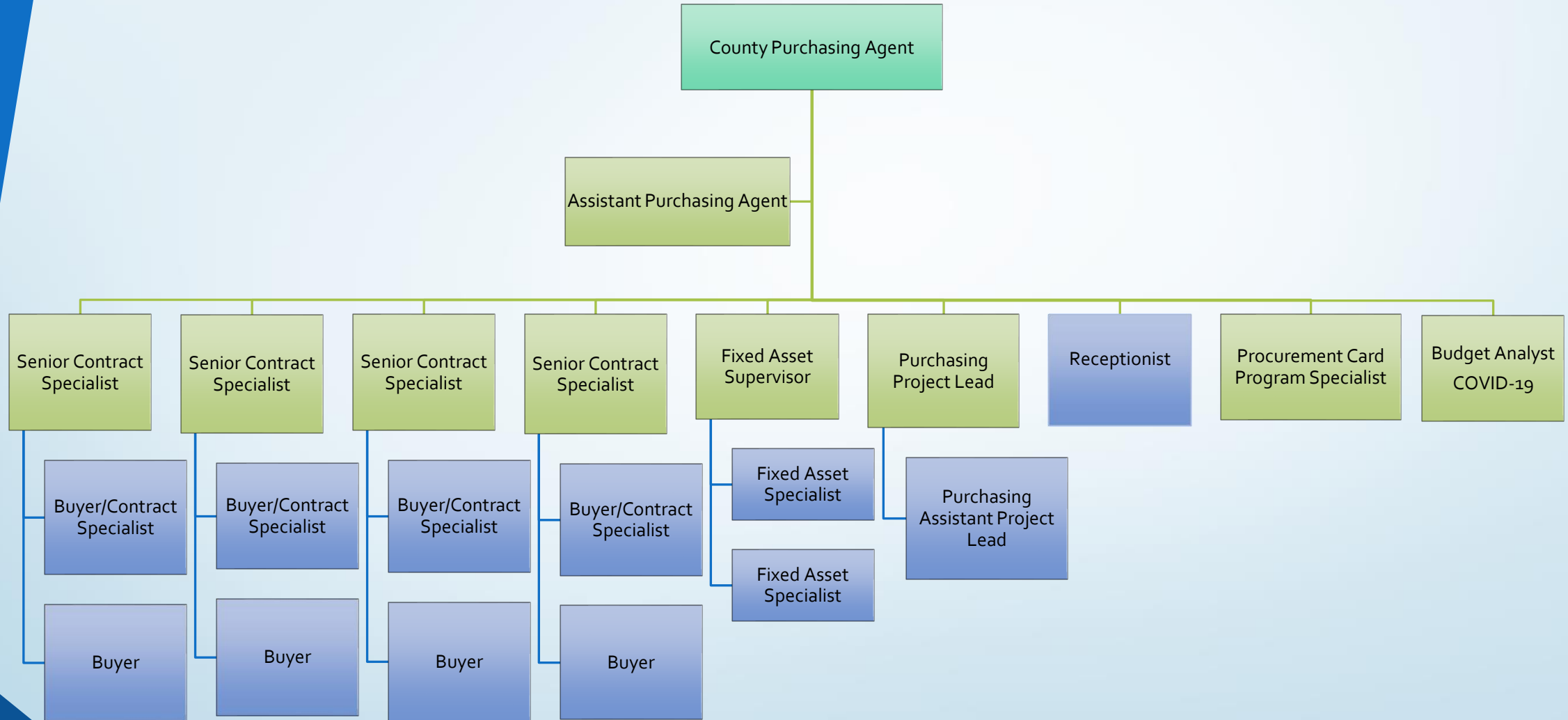


Bexar Purchasing Department

**FAIR CONTRACTING COALITION
BEXAR COUNTY BUSINESS AND BID OPPORTUNITIES
JOE FREEMAN COLISEUM, LEGENDS ROOM,
3201 E HOUSTON ST., SAN ANTONIO, TX 78219
Monday August 28, 2023, at 9:59 a.m.**

Bexar County Purchasing Agent
Patricia Torres, CTCD, CTCM 1

PURCHASING DEPARTMENT



BEXAR COUNTY SUPPLIER PORTAL

HOW TO REGISTER

- Bexar County Purchasing Department Website: <http://www.bexar.org/581/Purchasing-Procurement>
- Click on **Supplier Portal Registration** in the navigation bar and login from there.
- Information needed for Registration:
 - A signed copy of your W-9 Form.
 - Select any/all NIGP commodity codes to help identify your organization by its specialty, trade and /or line of business, it is important that you select all the ones that apply.
 - Select the Diversity Codes which pertain to the primary ownership of the business.
 - Confirm current certification status and attach all current certifications.

Bexar County accepts all certifications granted by the regional certification agencies, the State of Texas, the U.S. Small Business Administration, and other private and public certification agencies.

OPEN EVENTS AND ONLINE SUBMISSIONS

- While in the Bexar County Supplier Portal click on **Browse Open Events** listed under **Events**.
- You will be transferred to the **Open Events** screen.
- Click on the **Event** you wish to view.
- Carefully read the information contained in the solicitation and submit a complete response to all requirements and questions as directed.
- Allow ample time to ensure timely receipt, when ready to respond click **Respond Now** to begin the online submittal process. Make sure and click Submit at the very end. A message will appear saying “Congratulations, your response has been submitted.”.
- For Bexar County Supplier Portal troubleshooting assistance, email sophonie.barron@bexar.org or call at 210-335-1072 for assistance.

BEXAR COUNTY SUPPLIER PORTAL

CURRENT OPEN SOLICITATIONS

Sourcing Event	Name	Close Date
RFQ #1017	Adult Detention Center Annex Elevator Replacement	9/8/2023 10:00 a.m. CST
IFB #1030	Bexar County Vehicle Purchase FY 23-24	9/15/2023 10:00 a.m. CST
RFP #1033	Elevator Maintenance and Repair	9/22/2023 10:00 a.m. CST
IFB #1034	Judson Service Center Metal Storage Building	8/30/2023 10:00 a.m. CST
IFB #1035	ADC & Annex Laundry Equipment	9/22/2023 10:00 a.m. CST
RFQ #1036	ADC Main Electrical and MCC Replacement	9/15/2023 10:00 a.m. CST
IFB #1037	Vista Verde Chiller Replacement	9/08/2023 10:00 a.m. CST
IFB #1040	Bexar County Public Works Heavy Equipment	8/28/2023 10:00 a.m. CST
RFQ #1041	County Archives Bldg. Judicial Expansion	9/15/2023 10:00 a.m. CST
RFI #1042	NOFA – Water and Sewage Projects	10/03/2023 10:00 a.m. CST

BEXAR COUNTY

DECENTRALIZED PROCUREMENT

I. Purchase of Goods or Services expenditure exceeding \$50,000

Bexar County Supplier Portal is the County's Procurement Sourcing Module utilized to advertise, alert, share plans and bid documents, receive, manage and store all competitive solicitations issued by the Purchasing Department.

- a) The Supplier Portal has the capability of recording issued solicitations and associate amendments to the original solicitation. IFB, RFI, RFO, RFP or RFQ's issued by the Purchasing Department.

Please visit: <http://www.bexar.org/581/Purchasing-Procurement>

II. One-time Purchase of Goods or Services expenditure \$5,000 - \$49,999 (only)

Contract & Diversity Management System (CDMS/B2GNow) is the Small Business Enterprise Department's web-based system utilized by Offices & Departments to create and issue one-time informal bids:

- a) Prime vendors use CDMS to upload contract documents and report subcontractor/ sub supplier/ subconsultant payments made for any subcontractor/ sub supplier/ subconsultant performance.
- b) Subcontractor/ sub supplier/ subconsultant vendors use CDMS to confirm payments and/or submit disputes.
- c) SBED tracks payments to sub-contractors.

Please visit: <https://bexar.smwbe.com/>

III. CIVCAST.USA is a cloud-based bid management and online bidding service for civil construction bids

Civcast allows government agencies and civil engineers to reach more unsolicited contractors and subcontractors.

Public Works/Purchasing use Civcast to distribute plans and bid documents, track plan holders, automate addendum alerts, receive and respond to questions, receive bids, and automate bid tabulations.

Please visit: <https://www.civcastusa.com>

DATA COLLECTION

Data is collected by Bexar County; it is important to outline Bexar County Procurement is Decentralized.

Bexar County uses three sourcing modules:

\$50K+ Formal Competitive Bidding through County Supplier Portal by Purchasing.

Purchase of Goods or Services expenditure exceeding \$50,000.

Minority Owned Business Certification status is reported on Commissioners Court award agenda.

Data collected and provided in the monthly data transfer from Infor to CDMS/B2Gnow (referenced in next slide).

\$5K-\$49,999 Informal One-time Outreach Campaigns through CDMS/B2GNow by Offices/Departments.

SBED responsible for CDMS/B2GNow data collection capability and type of reporting capabilities.

Minority Owned Business Certification status is not reported, Commissioners Court approval is not required.

Data may be included in the Data collected and provided in the monthly data transfer from Infor to CDMS/B2Gnow (referenced in next slide).

CIVCAST.USA is a cloud-based bid management and online bidding service for civil construction bids.

Minority Owned Business Certification status is reported on Commissioners Court award agenda.

Data collected and provided in the monthly data transfer from Infor to CDMS/B2Gnow (referenced in next slide).

Commissioners Court awards not outsourced through either County Supplier Portal.

Data may be included in the Data collected and provided in the monthly data transfer from Infor to CDMS/B2Gnow (referenced in next slide).

The B2GNow Contract and Diversity Management System (CDMS) provides the County with a technological tool to monitor specific contract elements, which includes, but are not limited to, prime contractor requirements, subcontractor utilization, insurance and bonding, payment tracking, collect and certify data on small and diverse business certifications.

DATA COLLECTION

Two monthly data transfers from Infor to CDMS/B2Gnow (set to transfer on the 10th of each month):

1st monthly data transfer – provides a listing of all the active Contracts in Infor/Landmark (Procurement Module).

Contracts (Solicited by Purchasing/CC Approved Only)

Below are the field names for the data provided for Contracts:

| CONTRACT TITLE | CONTRACT ID | START DATE | END DATE | BUYER ORGN | STAFF NAME | MAX VALUE |
BUSINESS NAME | DBA NAME | VENDOR ID | LAWSON VENDOR # | PHONE NBR | FAX NBR | EMAIL
ADDRESS | ADDR 1 | CITY | STATE | ZIP | ZIP PLUS 4 | CONTACT FIRST NAME | CONTACT PHONE | CONTACT
FAX | CONTACT EMAIL | BEXAR

2nd monthly date transfer – provides a listing of all the information on Contract Payments from the previous month based off a specific selection of purchase orders in Infor/Landmark (Auditor Module).

Contract Payments (Auditor)

Below are the field names for the data provided for Contract Payments:

| AMOUNT PAID | DATE PAID | CONTRACT NBR | PAYMENT NBR | DATE INVOICED | FISCAL YEAR | VENDOR |
VENDOR NAME | PONBR | INVOICE |

THE PROCUREMENT CYCLE

The steps of the Procurement Cycle are summarized as follows:

1. Procurement Planning: Define the business need and establish the procurement objectives;
2. Procurement Method Determination: Identify the appropriate Procurement Method and, if applicable, issue a solicitation;
3. Vendor Selection: Fairly and objectively select the vendor that provides best value to the County;
4. Contract Formation & Award: Ensure that the awarded contract complies with applicable procurement law and contains provisions that achieve the procurement objectives; and
5. Contract Management: Administer and enforce the terms of the contract.



ROLES AND RESPONSIBILITIES

Step:	Performed By:
Purchases Less Than \$5k	
1) Create/submit electronic Requisition - NIGP Class/Item Commodity Codes, description of the goods or services sought to be procured. Email RQ # and supporting documentation, as follows: Quote dated within the last 30 days	Requesting Office/Department
2) Approval at departmental and Auditor's Office Levels.	Requesting Office/Department
3) Review of requisition and supporting documentation, and processing of Purchase Order. Copy sent to vendor email on file. If no email is available, requesting office/department is advised to provide copy to vendor.	Purchasing Department

ROLES AND RESPONSIBILITIES

Step:	Performed By:
One-Time Purchases Between \$5k - \$49,999	
<p>1) Create/submit electronic Requisition - NIGP Class/Item Commodity Codes, description of the goods or services sought to be procured. Email RQ # and supporting documentation, as follows: CDMS - Minimum of three (3) quotes dated within the last 30 days. Or COOP – Minimum of three (3) quotes encouraged, priced off a cooperative contract (must include valid coop contract number) dated within the last 30 days. <u>Proof of CDMS outreach issued (must include the following information):</u> Commodity Code Scope of Work (SOW) Outreach List Pre-bid Conference Agenda and Sign-in Sheet Q&A Documentation Addenda Issued (if applicable) Vendor Notification List All Responses Bid Tabulation <u>Important Note:</u> All expenditures over \$50K must be competitively bid through a formal process or use other local government contracts or cooperative agreements, and approved by Commissioners Court.</p>	<p>Requesting Office/Department</p>
<p>2) Approval at departmental and Auditor’s Office Levels</p>	<p>Requesting Office/Department, Auditor’s Office</p>
<p>3) Review of requisition, verification of supporting documentation, and processing of Purchase Order. Copy sent to vendor email on file. If no email is available, requesting office/department is advised to provide copy to vendor.</p>	<p>Purchasing Department</p>

ROLES AND RESPONSIBILITIES

Step:	Performed By:
\$50,000 – Above	
1) Provide: Technical Specifications, Scope of Work (SOW)/Scope of Services (SOS), plans, etc.	Requesting Office/Department
2) Define/finalize solicitation requirements, documents, and Terms and Conditions on the Bexar County Supplier Portal.	Requesting Office/Department and Purchasing
3) Solicit, advertise, and coordinate pre-bid conference (if applicable).	Purchasing Department
4) Event close, evaluation of documents to ensure completeness, and preparation of documents for department and/or evaluation committee.	Purchasing Department
5) IFB Evaluation	Purchasing and Requesting Office/Department
Or RFP evaluations (to include, if applicable, presentations, Best and Final Offer, Authority to Negotiate, negotiations)	Purchasing and Evaluation Committee and District Attorney's Office
Or RFQ evaluations (to include, if applicable, presentations, Authority to Negotiate, negotiate)	Requesting Office/Department and Evaluation Committee
6) Draft agreement	District Attorney's Office
7) Commissioners Court agenda	Purchasing and/or Requesting Office/Department
8) Process Award, Purchase Order, Contract from requisition and/or award.	Purchasing Department

ROLES AND RESPONSIBILITIES

Step:	Performed By:
<p>Data Collection</p>	
<p>Compiled, registered, and maintained in CDMS/B2Gnow by SBED.</p>	<p>Small Business & Enterprise Department (SBED)</p>
<p>The SBED Director, with the assistance of the IT Department, shall compile data on MWBE and SBE participation. Information on prime contractor awards and subcontractor utilization will be maintained by the SBED Director, which will gather the necessary data from all County Departments and Offices on a quarterly basis.</p>	<p>Per Administrative Policy 8.0 Section 11: Record Keeping and Tracking of SMWBE Utilization</p>
<p>BCIT and SBED, set to transfer on the 10th of each month two monthly data transfers from Infor to CDMS/B2Gnow</p>	<p>BCIT, SBED, CDMS/B2GNow (Infor to CDMS/B2Gnow monthly data transfer)</p>
<p>1st monthly data transfer – provides a listing of all the active Contracts in Infor/Landmark solicited by Purchasing (only) (Procurement Module).</p>	<p>BCIT, SBED, CDMS/B2GNow (Infor to CDMS/B2Gnow monthly data transfer)</p>
<p>2nd monthly date transfer – provides a listing of all the information on Contract Payments from the previous month based off a specific selection of purchase orders in Infor/Landmark (Auditor Module).</p>	<p>BCIT, SBED, CDMS/B2GNow (Infor to CDMS/B2Gnow monthly data transfer)</p>
<p>Certification Management</p>	
<p>Monitoring, tracking, and reporting</p>	<p>SBED, CDMS/B2GNow</p>
<p>Online vendor registration/application</p>	
<p>Certify diverse or local firms</p>	

ROLES AND RESPONSIBILITIES

Step:	Performed By:
Reporting	
BCIT and SBED, set to transfer on the 10th of each month two monthly data transfers from Infor to CDMS/B2Gnow	BCIT, SBED, CDMS/B2GNow (Infor to CDMS/B2Gnow monthly data transfer)
1 st monthly data transfer – provides a listing of all the active Contracts in Infor/Landmark solicited by Purchasing (only) (Procurement Module).	BCIT, SBED, CDMS/B2GNow (Infor to CDMS/B2Gnow monthly data transfer)
2 nd monthly date transfer – provides a listing of all the information on Contract Payments from the previous month based off a specific selection of purchase orders in Infor/Landmark (Auditor Module).	BCIT, SBED, CDMS/B2GNow (Infor to CDMS/B2Gnow monthly data transfer)
Certification Management	
Monitoring, tracking, and reporting	SBED, CDMS/B2GNow
Online vendor registration/application	
Certify diverse or local firms	

ROLES AND RESPONSIBILITIES

Step:	Performed By:
<p>Data Entry into CDMS</p>	
<p>Compiled, registered, and maintained in CDMS/B2Gnow by SBED</p>	<p>Small Business & Enterprise Department (SBED)</p>
<p>BCIT and SBED, set to transfer on the 10th of each month two monthly data transfers from Infor to CDMS/B2Gnow</p>	<p>BCIT, SBED, CDMS/B2GNow (Infor to CDMS/B2Gnow monthly data transfer)</p>
<p>1st monthly data transfer – provides a listing of all the active Contracts in Infor/Landmark solicited by Purchasing (only) (Procurement Module).</p>	<p>BCIT, SBED, CDMS/B2GNow (Infor to CDMS/B2Gnow monthly data transfer)</p>
<p>2nd monthly date transfer – provides a listing of all the information on Contract Payments from the previous month based off a specific selection of purchase orders in Infor/Landmark (Auditor Module).</p>	<p>BCIT, SBED, CDMS/B2GNow (Infor to CDMS/B2Gnow monthly data transfer)</p>
<p>Prime vendors use CDMS to upload contract documents and report subcontractor/ sub supplier/ subconsultant payments made for any subcontractor/ sub supplier/ subconsultant performance.</p>	<p>Prime vendors Per Administrative Policy 8.0</p>
<p>Subcontractor/ sub supplier/ subconsultant vendors use CDMS to confirm payments and/or submit disputes.</p>	<p>Subcontractor/ sub supplier/ subconsultant vendors Per Administrative Policy 8.0</p>
<p>SBED tracks payments to sub-contractors.</p>	<p>Small Business & Enterprise Department (SBED)</p>
<p>Certification Management</p>	
<p>Monitoring, tracking, and reporting</p>	<p>SBED, CDMS/B2GNow</p>
<p>Online vendor registration/application</p>	
<p>Certify diverse or local firms</p>	

ROLES AND RESPONSIBILITIES

Step:	Performed By:
Data Reporting	
Compiled, registered, and maintained in CDMS/B2Gnow by SBED	Small Business & Enterprise Department (SBED)
BCIT and SBED, set to transfer on the 10th of each month two monthly data transfers from Infor to CDMS/B2Gnow	BCIT, SBED, CDMS/B2GNow (Infor to CDMS/B2Gnow monthly data transfer)
1 st monthly data transfer – provides a listing of all the active Contracts in Infor/Landmark solicited by Purchasing (only) (Procurement Module).	BCIT, SBED, CDMS/B2GNow (Infor to CDMS/B2Gnow monthly data transfer)
2 nd monthly date transfer – provides a listing of all the information on Contract Payments from the previous month based off a specific selection of purchase orders in Infor/Landmark (Auditor Module).	BCIT, SBED, CDMS/B2GNow (Infor to CDMS/B2Gnow monthly data transfer)
Certification Management	
Monitoring, tracking, and reporting	SBED, CDMS/B2GNow
Online vendor registration/application	
Certify diverse or local firms	

ROLES AND RESPONSIBILITIES

Step:	Performed By:
Training	
Training on the Contract and Diversity Management System (CDMS)	Small Business & Enterprise Department (SBED)
Verify payments to sub-contractors, sub-suppliers, and sub-consultants, and seek to resolve any disputes and provide training on the Contract and Diversity Management System (CDMS).	Small Business & Enterprise Department (SBED)
Develop and implement educational and training programs to assist SMWBE to compete effectively for County contracts.	Small Business & Enterprise Department (SBED)
Develop and implement a training program for Offices and Departments to increase the posting of notices, solicitation, documentation, and use of SMWBE.	Small Business & Enterprise Department (SBED)
Certification Management	
Monitoring, tracking, and reporting	SBED, CDMS/B2GNow
Online vendor registration/application	
Certify diverse or local firms	

ROLES AND RESPONSIBILITIES

Step:	Performed By:
Deliver goods/services as outlined in contract/ PO and submit invoice	Vendor
Receive goods/services and verify completeness against contract/ PO.	Requesting Office/Department (Coordinate with Purchasing – Fixed and Controlled Assets)
Electronically receive items in Lawson System and submit invoice(s) to Auditor's Office. *	Requesting Office/Department
Electronically match receiver with invoice and generate payment	Auditor
Electronically save documentation of the Request /Solicitation, list of vendors contacted and responses, advertisement/internet posting, Purchase Order(s), Contract(s), invoice(s) and request(s) for payment (s)	Requesting Office/Department and Purchasing
Submit payment claim to Commissioners Court for approval	Auditor
Approve payment of claim	Commissioners Court
Disburse payment of claim	County Treasurer
Vendor invoices shall be paid within 30 days from the time an invoice is received at the Bexar County Auditor's Office.	County Auditor's Office

PURCHASING THRESHOLDS

- \$4,999 or Less – Obtain multiple quotes (Open Market)
 - CDMS Outreach and/or Lawson/INFOR
 - Cooperative Purchase/PunchOut
 - Discretionary Exemption Purchase
- \$5,000 to \$49,999 – Obtain multiple Quotes (Informal)
 - CDMS Outreach and/or Informal Solicitation (IFB/RFQuote)
 - Cooperative Purchase/PunchOut
 - Discretionary Exemption Purchase
- \$50,000 and over – Competitive Bid
 - Formal Solicitation (IFB, RFO, RFP, RFQ)
 - Cooperative/Interlocal Contracts
 - Discretionary Exemption Purchase
- Professional Services – Advertised as either RFQ or RFP
 - demonstrated competence and qualifications to perform the services, and
 - a fair and reasonable price

COUNTY COOPERATIVE PURCHASING AGREEMENTS

Bexar County is a member of numerous cooperative purchasing programs. Commonly used cooperative purchasing agreements include (not limited to):

- Department of Information Resources (DIR) Information and Communications Technology Cooperative Contracts
- Harris County Department of Education (HCDE) Choice Partners Cooperative
- Houston-Galveston Area Council (HGACBuy)
- National Association of State Procurement Officials (NASPO ValuePoint)
- OMNIA Partners (formerly TCPN/National IPA and US Communities)
- Sourcewell (formerly NJPA)
- Tarrant County Cooperative Purchasing Program
- Texas Association of School Boards (BuyBoard Program)
- Texas Correctional Industries (TCI)
- Texas Industries for the Blind and Handicapped (TIBH)
- TXMAS - Texas Multiple Award Schedules (TXMAS)
- The Interlocal Purchasing System (TIPS Program)
- The Purchasing Association of Cooperative Entities (PACE)
- US General Services Administration (GSA Legacy Schedule 70 (IT) & 84 (Public Safety))
- 791 Purchasing Cooperative

FREQUENTLY ASKED QUESTIONS

How can I improve my chances at participation in Bexar County procurements?

A vendor can improve its chances at participation in Bexar County procurements by incorporating the following actions:

- The State of Texas and Bexar County use the NIGP (National Institute for Governmental Purchasing) commodity codes categorize goods and services. These NIGP codes are divided into purchasing class and item codes (numeric) that best represent the goods and/or services offered. Properly identifying goods and/or services will help public procurement professionals accurately identify interested vendors in particular industries.
- CDMS/B2GNow uses the North American Industry Classification System (NAICS) is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. Properly identifying goods and/or services will help Bexar County Offices and Departments accurately identify interested vendors in particular industries
- Vendors must be in good standing with state and federal entities. Prospective vendors are encouraged to confirm if their business entity is subject to Texas franchise tax and determine if they are in good standing or “active”. Public procurement professionals will also ensure that potential vendors are in good standing with the federal government by checking federal databases, such as SAM.gov.

FREQUENTLY ASKED QUESTIONS

How can I improve my chances at participation in Bexar County procurements?

A vendor can improve its chances at participation in Bexar County procurements by incorporating the following actions:

- **Formal Purchases of Goods or Services expenditure exceeding \$50,000.**
Please visit/register: <http://www.bexar.org/581/Purchasing-Procurement>
- **Informal One-time Purchases of Goods or Services expenditure \$5,000 - \$49,999 (only).**
Please visit/register: <https://bexar.smwbe.com/>
- **CIVCAST.USA is a cloud-based bid management and online bidding service for civil construction bids**
Please visit/register: <https://www.civcastusa.com>

FREQUENTLY ASKED QUESTIONS

Where can I find information on the SB&E Department?

The Small Business and Entrepreneurship Department (**SBED**)
Phone: 210-335-2478 or visit www.bexar.org/SBED.

Where can I find information on SCTRCA?

South Central Texas Regional Certification Agency (SCTRCA)
3201 Cherry Ridge St Building B Suite #210 San Antonio, TX 78230
Phone: 210-227-4722 <https://sctrca.org/> or support@sctrca.org

Bexar County accepts all certifications granted by the regional certification agencies, the State of Texas, the U.S. Small Business Administration, and other private and public certification agencies. It is recommended that you obtain all certifications that apply to you and your business, as certifications play a role in determining what entities governments do business with.

DESIGNATIONS & CERTIFICATIONS

Small Business Enterprise (SBE)

Minority Business Enterprise (MBE)

Historically Underutilized Business (HUB)

Disadvantaged Business Enterprise (DBE)

African-American Business Enterprise (AABE)

Hispanic American Business Enterprise (HABE)

Native American Business Enterprise (NABE)

Veteran-Owned Business Enterprise (VBE)

Asian Business Enterprise (ABE)

Woman-Owned Business Enterprise (WBE)

Emerging Small Business Enterprise (ESBE)

Asian-Pacific American Business Enterprise (ASBE)

Disabled Individual Business Enterprise (DIBE)

American Indian Business Enterprise (AIBE)

SBA Program for Development of Women-Owned Businesses (8M)

Service-Disabled Veteran-Owned Small Business (SDVOBE)

SBA Program for Development of Small Businesses in HUB Zones (8A)

Lesbian, Gay, Bisexual and/or Transgender-Owned Business Enterprise (LGBTBE)

LIST OF CERTIFYING ENTITIES

Texas Unified Certification Program

- City of Austin
- City of Houston
- Corpus Christi Regional Transportation Authority
- North Central Texas Regional Certification Agency (NCTRCA)
- South Central Texas Regional Certification Agency (SCTRCA)
- Texas Department of Transportation (TXDOT)

State

- State of Texas Historically Underutilized Business (HUB) Program
- State of Texas Historically Underutilized Business (HUB) Program Coordinators Contact List

Federal

- Small Business Administration (SBA) - 8(a)
- Small Business Administration (SBA) - 8(m)
- Service-Disabled Veteran-Owned Business (SBA)

Private Sector

- Disability:IN
- National Gay & Lesbian Chamber of Commerce (NGLCC)
- National Minority Supplier Development Council (NMSDC)
- Southwest Minority Supplier Development Council (SMSDC)
- Women's Business Enterprise National Council (WBENC)