



# Timely Communication & Coordination 2023 PEPS Conference

Mindy N. Sawyer, P.E.

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# HELP #EndTheStreakTX

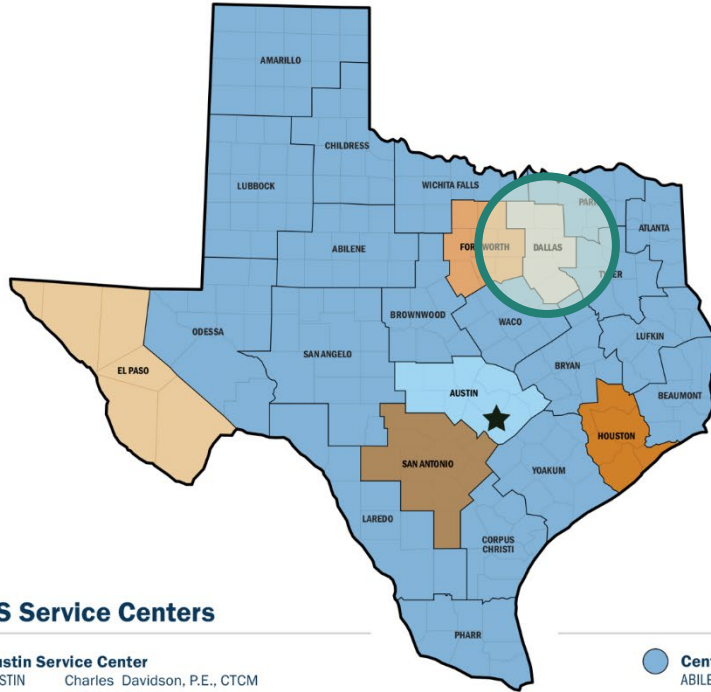
End the streak of daily deaths on Texas roadways.

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



#EndTheStreakTX Toolkit





## ★ 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**  
Dione Albert  
512.284.2093  
Dione.Albert@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

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

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

**Fort Worth Service Center**  
FORT WORTH Natasha Tabatabaai, P.E.  
469.766.9281  
Natasha.Tabatabaai@txdot.gov

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

**Central Service Center**

ABILENE	BRYAN	LUBBOCK	TYLER	
AMARILLO	CHILDRESS	ODESSA	WACO	Jaime A. Vela, P.E.
ATLANTA	CORPUS CHRISTI	PARIS	WICHITA	512.416.2007 or
BEAUMONT	LAREDO	PHARR	FALLS	956.712.7730
BROWNWOOD	LUFKIN	SAN ANGELO	YOAKUM	Jaime.A.Vela@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



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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.

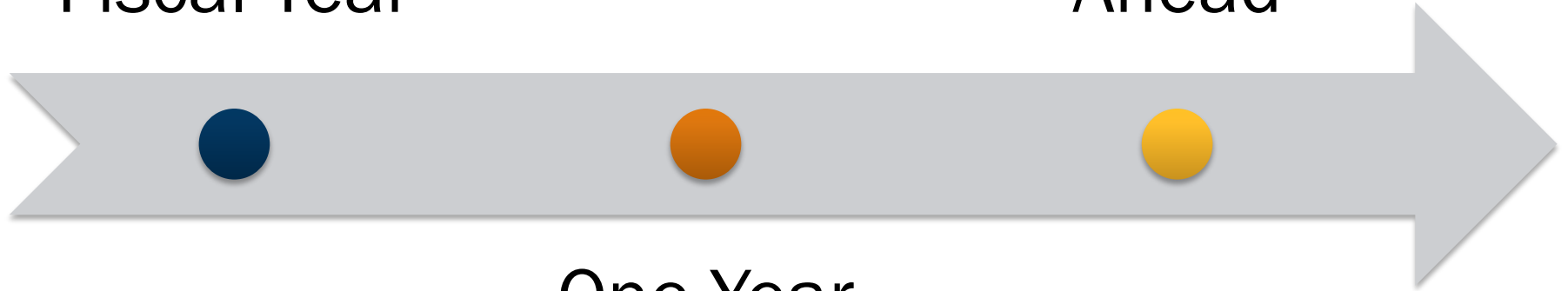
# Timeline of Contract Needs



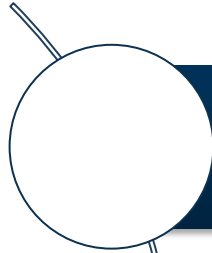


Current  
Fiscal Year

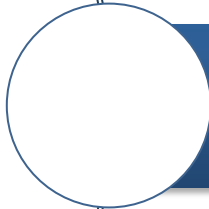
Two Years  
Ahead



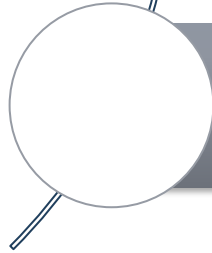
One Year  
Ahead



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).

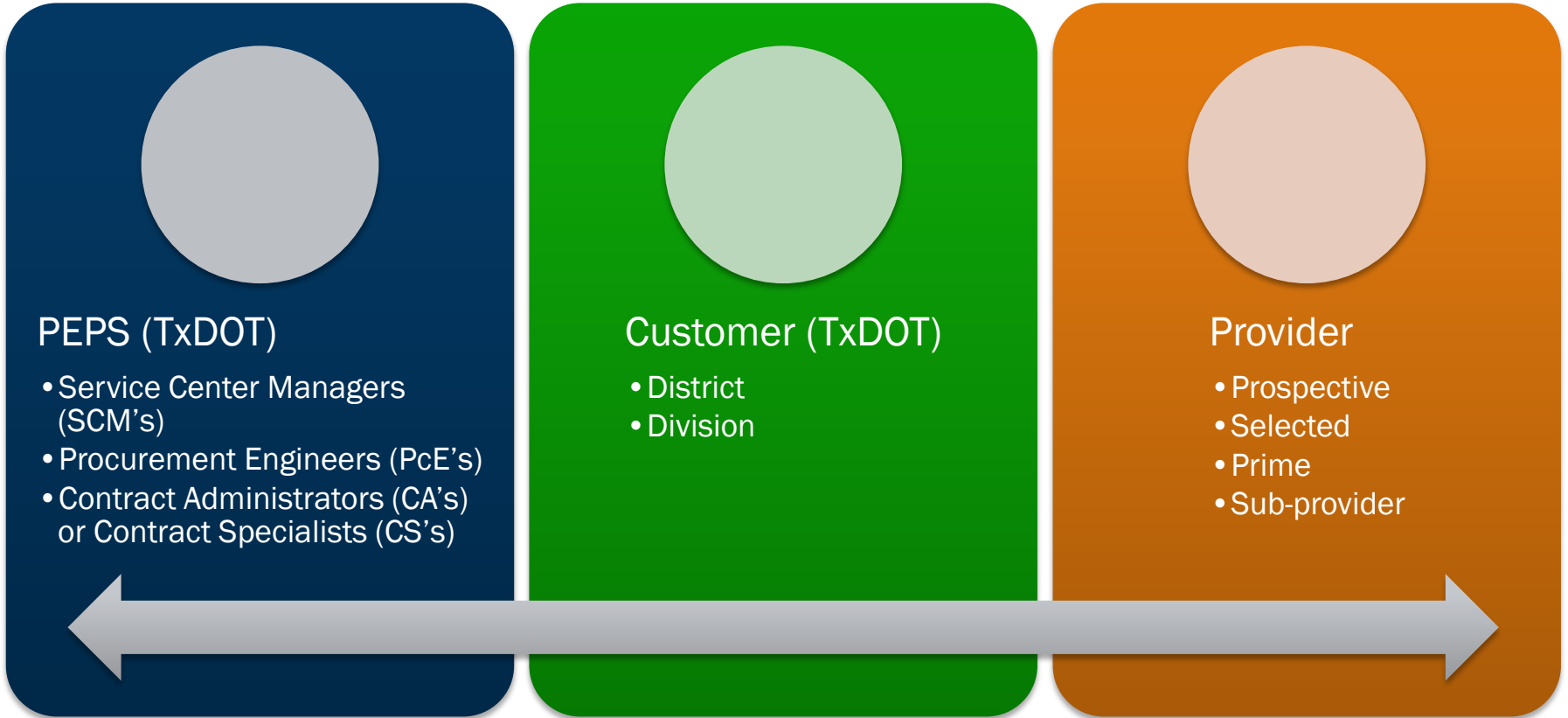


For some, the contract life cycle helps determine when the next indefinite deliverable contracts are needed (example: Utility Engineering, Geotechnical Engineering, or Material Engineering may be needed every 3 or 4 years).



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.



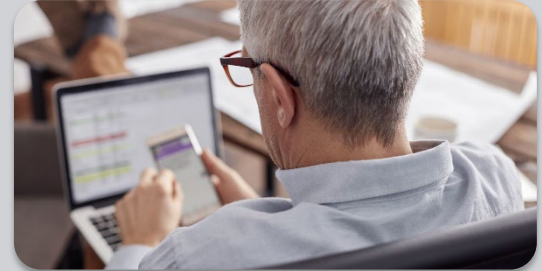
## PEPS

- 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
- Diverse Relationships for Informative Value Exchange (DRIVE) Program
- PEPS Conference!

# Questions and Discussion







# Mindy Sawyer, P.E.

TxDOT | PEPS Division | Lead Procurement Engineer



[Mindy.Sawyer@txdot.gov](mailto:Mindy.Sawyer@txdot.gov)



(214) 320-6659