



This newsletter is published on a monthly basis to provide relevant information to government purchasing and contracting professionals regarding public procurement and contracting topics. Hope you enjoy!

**Happy
Holidays!**

In This Issue

[Selecting Evaluation Team Members](#)

[Question of the Month](#)

[Current Training Schedule](#)

Selecting Evaluation Team Members

Training Schedule



Workshop Prices:
\$310 (1-day)
\$515 (2-day)
Group Discounts
Available

Agile Executed Efforts

January 23, 2018
Austin

August 7, 2018
Austin

Communication and Stakeholder Management

February 20, 2018
Austin

Compressing the Contract/Project Schedule

Selecting evaluation team members seems like a simple task. Right? Not always. As we all know, sometimes something simple can easily become complicated! The members of your evaluation team serve an important purpose. They are the ones to evaluate and score the proposals submitted and will ultimately determine the awarded vendor. Selection of the team should be carefully considered.



Members of the evaluation team generally include:

- A procurement representative who serves as the team lead and is a non-voting member. They have overall responsibility for all matters involving the procurement and its procedures.
- The department requesting the services is always represented on the team (a.k.a. end user).
- Subject matter experts who have experience or knowledge on the goods or services being purchased. Often, subject matter experts come from the user department. Other subject matter experts could include members from various departments such as Information Technology, Legal, Facilities, etc. depending on the nature of the procurement.
- Stakeholders may be included as they are the ones who will use the services provided by the resulting contract.

A common question many purchasers have is, "how many members should be on the evaluation team?" The answer depends on the size and complexity of the procurement. A good rule of thumb is 3-5 members. This is not a "set in stone" rule. It is your agency's decision to establish the best evaluation team for a particular procurement.

February 21, 2018
Austin

Contracting for Agile Projects

January 24, 2018
Austin

August 8, 2018
Austin

Contract Risk Assessment and Monitoring

April 26, 2018
DFW-Irving

July 17, 2018
Austin

October 23, 2018
Houston

Cost Estimating Techniques

July 11, 2018
Houston

Cost Management in Contracts/Projects

April 18, 2018
Austin

Effectively Managing Multiple Projects



Other considerations may include:

- **Subordinate relationships** - it is generally discouraged to have subordinate relationships (supervisor/employee) on the same committee due to undue influence from the supervisor to the employee. However, sometimes there are limited subject matter experts in an agency and it makes sense to have the supervisor and the employee on the team. Just make sure both are aware about influencing others - intentional and unintentional.
- **Availability** - being on an evaluation team is a significant time commitment. Make sure that the members realize this and will open their calendars as needed.
- **Confidentiality** - evaluation committee members must sign non-disclosure agreements. Members need to know that this includes their supervisor, city council members, school board members, county commissioners - or anyone who has not signed a non-disclosure.

The evaluation team and its functions are an essential part of the process leading to the award of a Request for Proposal. Selecting the right evaluation team members

April 17, 2018
Austin

July 10, 2018
Houston

Essentials of Contract Management

January 30-31, 2018
DFW-Irving

June 5-6, 2018
Austin

Sept. 12-13, 2018
Houston

Ethics in Contracting

May 17, 2018
Houston

September 20, 2018
DFW-Irving

October 11, 2018
Austin

Fundamentals of Public Purchasing

Dec. 12-13, 2017
Austin

March 21-22, 2018
Houston

June 13-14, 2018
DFW-Irving

will go a long way in selecting the best vendor for your entity's project.

Question of the Month

QUESTION:

"What is the difference between *enhanced contracting monitoring* and *performance monitoring*? Is there a dollar threshold between the two?"



ANSWER:

Below is an excerpt from the State of Texas Contract Management Guide (page 104) on Enhanced Contract Monitoring.

ENHANCED CONTRACT AND PERFORMANCE

MONITORING: State agencies are required to utilize an enhanced monitoring method for high dollar and high-risk contracts. Enhanced monitoring is an increased level of monitoring, beyond the regular monitoring normally used. Such increased monitoring may include, but is not limited to: frequency of site visits, provider meetings, and documentation requirements deemed necessary by the agency to assess progress of the contractor toward meeting the identified goals and outcomes established in response to assessments of unsatisfactory performance in accordance with this procedure.

There is not an established state-wide dollar threshold. It makes more sense for each agency to determine which contracts are considered in need of "enhanced monitoring" based on a risk assessment. Some individual agencies do establish dollar thresholds. For example, agencies with many high dollar, complex contracts may establish a \$10 million-dollar threshold for "enhanced monitoring". For other agencies, a \$1 million-dollar contract may require "enhanced monitoring".

State agencies are required to establish a procedure for enhanced contract monitoring per Texas Government Code, 2261.253(c).

Sept. 26-27, 2018
Austin

Fundamentals of Six Sigma Techniques

September 11, 2018
Austin

Grants Management & Evaluation

March 20-21, 2018
Austin

June 20-21, 2018
Houston

November 7-8, 2018
DFW-Irving

December 4-5, 2018
Austin

Negotiation Skills

February 7, 2018
Houston

April 5, 2018
Austin

July 19, 2018
DFW-Irving

Procurement Management Academy

Jan. 24-25, 2018
Houston

Here is a link to the [Department of Information's Contract Handbook](#) which outlines their agency requirements for "enhanced monitoring" and provides an example of their Risk Assessment Tool.

You can find **State Agency Contract Management Procedures** for over 60 state agencies on the [CPA website](#).

Hope that answers your question.

May 8-9, 2018
Austin

July 11-12, 2018
DFW-Irving

Purchasing 101 for Everyone

February 6, 2018
Austin

April 12, 2018
DFW-Irving

July 18, 2018
Houston

October 10, 2018
Austin

Specification Writing

March 6, 2018
Austin

May 16, 2018
Houston

September 19, 2018
DFW-Irving

December 6, 2018
Austin

Using Request for Proposals

April 10-11, 2018
Houston

October 16-17, 2018
DFW-Irving

November 7-8, 2018
Austin