



# How to Pass the Proposal Screening Process

## 2022 PEPS Conference

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December 1, 2022



# To keep you in the game!



**PEPS Goal = Zero Disqualifications**



1

- Purpose

2

- Submittal Process

3

- Screening Resources

4

- Submittal Attachments

5

- Final Thoughts

6

- Questions and Comments



**Time**  
**A**



**Money**  
**B**



**Effort**  
**C**

*If you're DQ'd, it's a loss to you and a loss to the State!*



# Has your firm ever submitted a Proposal to TxDOT-PEPS?



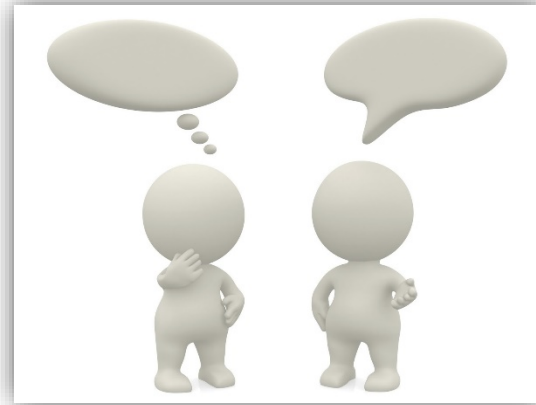


**Is there anybody here that is completely new to our solicitation process?**





# What are some reasons for Disqualification (DQ)?





## SUBMITTALS THROUGH TIME

Submission  
of multiple  
paper copies

Submission  
of paper copy  
and a USB  
drive

Electronic  
Submission





No more special deliveries needed.






### Additional Bonfire Benefits



Submittal checking that helps to prevent missed elements of your submission.



Ability to modify or replace a response up to the closing date deadline.



Receipt upon successful submission with a date and time stamp.





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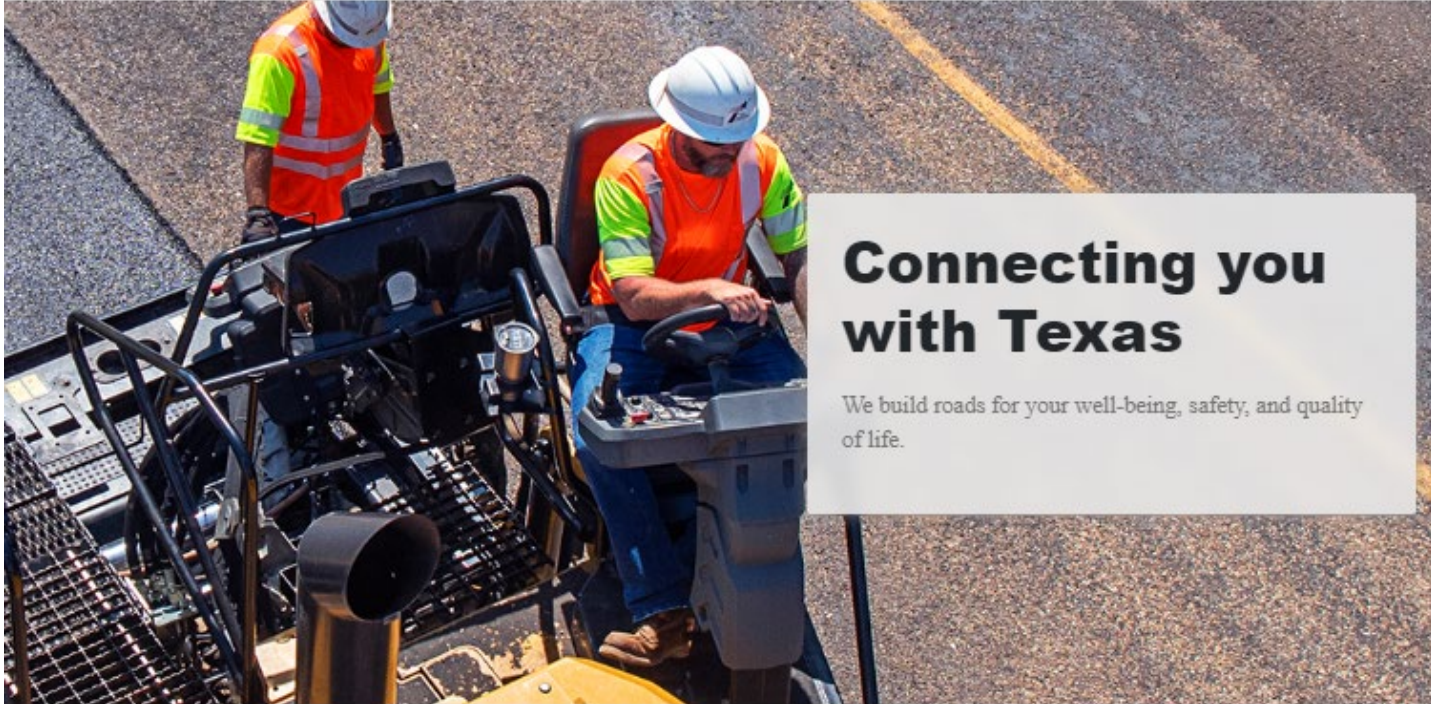
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- [Compliance and ethics requirements](#)



## Engineering, architectural, and surveying consultants



### Working with PEPS

[Qualifications-based selection »](#)



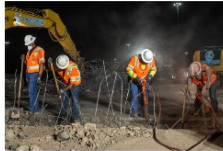
### Become precertified

[Eligibility & application preparation and](#)



### Become administratively qualified

[Non-federal & federal process and submittal process »](#)



### Additional requirements for contracting with PEPS

[HUB or DBE subcontracting goals and insurance requirements »](#)



### Business opportunities

[Projected contracts, consultants selected, and contract advertisements »](#)



### Training and events

[PEPS conferences and fireside chats »](#)



### Manage active contracts

[PS-CAMS and invoicing »](#)



### Perform required administrative tasks

[Learn more »](#)



### Resources

[Eligible firms, forms, and state laws & rules »](#)





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## Business opportunities

### Projected contracts solicitations


- [2023 Fiscal year](#)
- [2024 Fiscal year](#)




Consultants selected for negotiations




PEPS contract advertisements



Consultant information meetings



Fiscal year procurement plan



DRIVE mentor-mentee Program

## Projected Contracts List FY2023

NOTE: To ensure that you are viewing the most current list, please clear your cache, delete your browsing history, and/or refresh your screen.

Below is a list of anticipated contracts for architectural, engineering and surveying professional services.

A project's presence on this list is not an indication that a project contract is authorized for advertisement. The information is subject to change.

10/25/2022

Estimated Date of Advertisement	Discipline of Procurement	District or Division Managing Contract	Procuring PEPS Service Center	Procurement Contact	Procurement Engineer (Do Not Contact)	Selection Process	Description of Procurement (Location, project limits, type of work, unique services, etc.)	Project Location (County, District, Statewide)	Contract Type Specific Deliverable (SD) Indefinite Deliverable (ID)	Anticipated Funding Type (State or Federal)	Number of Contracts	Estimated Maximum Contract Value	Pre-Solicitation Meeting
October 2022 Wave 1	Construction, Engineering, Inspection (CEI)	Laredo District	Urban	<a href="#">Jaime Yala</a>	Alison Kurwitz	Federal with Interview (DBE)	CEI services for the Laredo District: US 59 from 0.12 miles south of Corridor Rd. (Airport) to International Blvd.	Laredo District	SD	Federal	1	TBD	<a href="#">Thursday, October 20, 2022 3:00 p.m. - 4:00 p.m. Virtual MS Teams</a>
October 2022 Wave 1	Construction, Engineering, Inspection (CEI)	Odessa District	Rural	<a href="#">Larit Carnel</a>	Manny Salas	Federal with Interview (DBE)	CEI services for the Odessa District - IH 20 Widening and adding lanes.	Ector / Midland	SD	Federal	1	TBD	<a href="#">Tuesday, September 27, 2022 10:00 a.m. - 11:00 a.m. CT Virtual MS Teams</a>
October 2022 Wave 1	Engineering - Other	Design Division (DES)	Divisions	<a href="#">Keri Bostwick</a>	Billy Press	Non Federal with Interview (MSB)	Design Division: Strategic Planning and Implementation of Digital Delivery of schematics and PS&E	Statewide	ID	State	1	\$9,000,000	<a href="#">Friday, October 21, 2022 10:00 a.m. - 11:00 a.m. CT Virtual MS Teams</a>
October 2022 Wave 1	Schematic / Environmental	Dallas District	Dallas	<a href="#">Joe Jancuska</a>	Christopher Franco	Federal with Interview (DBE)	Schematic/Environmental services for the I-345 project from IH 30 to SPUR 366 in the Dallas District.	Dallas District	SD	Federal	1	TBD	<a href="#">Friday, September 9, 2022 11:00 a.m. - noon. Virtual MS Team</a>
December 2022 Wave 2	Comprehensive Engineering Consultant (CEC)	Austin District	Austin	<a href="#">Charles Davidson</a>	Todd Speck	Federal with Interview (DBE)	CEC services for the Austin District to augment and support the District's staff in needed areas for various ongoing projects and services.	Austin District	ID	State	2	\$10,000,000	<a href="#">Wednesday, November 9, 2022 2:00 p.m. Virtual MS Teams</a>
December 2022 Wave 2	Construction, Engineering, Inspection (CEI)	Corpus Christi District	Urban	<a href="#">Jaime Yala</a>	TBD	Federal with Interview (DBE)	CEI services for the Corpus Christi District: US 281 around Alice from BS 281 South to BS 281 North. Project will construct mainlines and grade separations for the future I-69 Corridor.	Jim Wells County	SD	Federal	1	TBD	
December 2022 Wave 2	Construction, Engineering, Inspection (CEI)	Dallas District	Dallas	<a href="#">Joe Jancuska</a>	TBD	Federal with Interview (DBE)	CEI services for the Dallas District: IH 35 from N Texas Blvd to IH 35W, to US 380, to US 77 in Denton County	Dallas District	SD	Federal	1	TBD	
December 2022 Wave 2	Construction, Engineering, Inspection (CEI)	Fort Worth District	Fort Worth	<a href="#">Jessica Andreas</a>	TBD	Federal with Interview (DBE)	CE&I Services for Fort Worth District	Fort Worth District	ID	Federal	3	\$7,000,000	<a href="#">Thursday, December 8, 2022 11:00 a.m. - noon. TxDOT Fort Worth District HQ 2501 SW Loop 820 Fort Worth, TX 76134</a>
December 2022 Wave 2	Construction, Engineering, Inspection (CEI)	Houston District	Houston	<a href="#">Kimberly Nubren</a>	TBD	Federal with Interview (DBE)	CEI services for the Houston District: I-45 - Causeway to 61st	Galveston County	SD	Federal	1	TBD	
December 2022 Wave 2	Construction, Engineering, Inspection (CEI)	Paris District	Rural	<a href="#">Larit Carnel</a>	Phil Howlett	Federal with Interview (DBE)	CEI services for the Paris District: US-75, from North Loy Lake Road to US-82, widen 4 lanes to 6 lane	Grayson County	SD	Federal	1	TBD	<a href="#">Wednesday, November 16, 2022 2:00 p.m. - 3:00 p.m. Virtual MS Teams</a>
December 2022 Wave 2	Construction, Engineering, Inspection (CEI)	Tyler District	Urban	<a href="#">Jaime Yala</a>	TBD	Federal with Interview (DBE)	CEI services for the Tyler District: FM 2493 from FM 346 to 0.3 miles south of FM 344 (Smith County line), and Smith County line to US 69 S of Bullock widen to 4 lanes with overpass (2 CSAs)	Tyler District	SD	Federal	1	TBD	











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## Business opportunities

### Projected contracts solicitations

- [2023 Fiscal year](#)
- [2024 Fiscal year](#)



Consultants selected for negotiations

PEPS contract advertisements

Consultant information meetings

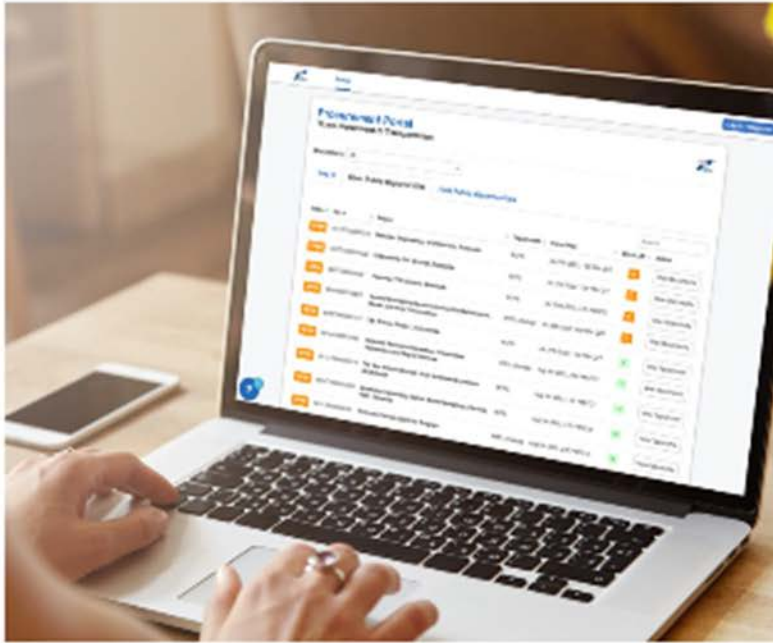
Fiscal year procurement plan

DRIVE mentor-mentee Program



## PEPS contract advertisements

This page contains additional documents and information related to professional services solicitations.



### Bonfire electronic submittal platform

PEPS procurements are posted in the Bonfire electronic submittal and evaluation tool (eSET) prior to each wave. Vendors will use eSET to submit responses to PEPS solicitations.

- [Bonfire frequently asked questions - November 2021](#)
- [Electronic submittals presentation - October 14, 2020](#)

[txdot.bonfirehub.com](https://txdot.bonfirehub.com)



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 (If applicable)

Attachment 6: HUB Subcontracting Plan (HSP) (Non-Federal)







The last thing said in the video...



“Not the best, but I think it **QUALIFIES**, and it’s a **WIN.**”



Our presentation is to help you **QUALIFY**, and that is a **WIN.**

# Screening Checklist – Federal (DBE)



## Proposal Screening Checklist Federal Process

Criteria	RFP Requirements	Pass	Fail
Cover Page Certifications (Criterion B-1)	All the certification statements are checked yes.		
Cover Page Screening (Criterion B-2)	The Prime Provider Project Manager is an employee of the prime firm and has entered the required license information. The project manager identified in the cover page questionnaire must match the project manager listed in the proposal or the proposal will be considered non-responsive. If required in the RFP, the Deputy PM is listed on the cover page, is an employee of the prime firm, and has entered the required license information.		
Prohibited Agency (Criterion C-1)	Per Govt. Code 2252.152, etc., Texas agencies are prohibited by law from conducting business with certain companies listed on the State Comptroller's webpage, which also includes other prohibited entities. Check all the lists located at the link below for Prime Provider Name. <a href="https://comptroller.texas.gov/purchasing/publications/divestment.php">https://comptroller.texas.gov/purchasing/publications/divestment.php</a>		
Debarred Agency (Criterion C-2)	Verify that the Prime Provider firm is not on the list of FHWA excluded firms at <a href="https://www.sam.gov/">https://www.sam.gov/</a> .		
Proposal within Page Limits (Criterion C-3)	The number of pages within the proposal package does not exceed the number of pages specified in the RFP. If the proposal contains more pages than specified, only the correct number of pages will be scored, the rest will be omitted. This is not a disqualification.		
Proposal Formatted Correctly (Criterion C-4)	The proposal is in substantial compliance with the remainder of the formatting requirements identified in the RFP. A proposal will not be disqualified for minor formatting issues.		
Not Precluded (Criterion C-5)	If the RFP includes a preclusion statement, verify that the prime provider and all subcontractors are not precluded from competing for the advertised contract. Address any disclosure or other requirement related to the management of conflicts of interest, as applicable.		
Follows Core Team Restrictions (Criterion C-6)	If the RFP includes a core team restriction statement, verify that the core team members are not submitted as core team members on other teams competing for this solicitation or others in this wave as applicable.		
PTC DBE Goal Good (Criterion C-7)	The project team meets the assigned DBE goal. If not, demonstration of good faith effort documentation is attached. Each prime and sub firm listed to meet the assigned goal is found in the TUCP Directory. Refer to the "Verification of DBE Certifications, Guidance and Instructions." Subproviders: Each subprovider listed to meet the goal must be certified in the NAICS Code applicable to the type of service being offered by that firm. If not, the firm cannot be counted toward the assigned DBE goal. The proposal package will not be disqualified if the overall DBE goal is met with qualified subproviders. Prime Providers: A DBE prime provider may be counted toward the goal. DBE prime providers do not need to be screened for NAICS codes. If the prime is a		



## Proposal Screening Checklist Federal Process

Criteria	RFP Requirements	Pass	Fail
	DBE firm, and a subprovider does not have an acceptable NAICS code, the proposal will not be disqualified.		
PTC Firms AQ (Criterion C-8)	Each prime or sub firm proposing to perform engineering or design-related services must be either 1) administratively qualified (AQ) as of the proposal deadline date or 2) determined to be eligible by the TxDOT AQ Group to use the federal safe harbor rate as of the Proposal deadline date. Verify the AQ status of firms and save a highlighted copy in the procurement file on the P drive for each response (per PEPS AQ list posted at <a href="https://www.tdot.gov/business/consultants/architectural-engineering-surveying/list-of-firms.html">https://www.tdot.gov/business/consultants/architectural-engineering-surveying/list-of-firms.html</a> ).		
PTC Task Leaders Precertified (Criterion C-9)	The task leader for each work category is precertified in the category. If not, verify the status of the firm proposed to provide the task leader. If the firm has active precertification status and employs at least one individual that is precertified in the work category, do not disqualify. A firm providing a task leader must have active precertification status in that category in the CCIS database: <a href="http://www.dot.state.tx.us/des/precert/precert1.htm">http://www.dot.state.tx.us/des/precert/precert1.htm</a> as of the proposal deadline date. If the firm is inactive, and the proposal closing date was on or before March 31, and the screening is performed after March 31, then additional steps are required to verify renewal status. See the PEPS guidance: Firm Renewal Status and Verification of Precertification Guidance and Instructions.		
PTC Task Leaders Consistent (Criterion C-10)	A task leader identified in the proposal should match the task leader listed on the PTC form for the same Work Category or the proposal may be considered non-responsive. Not all task leaders on the PTC form need to be mentioned in the proposal. If a person is mentioned in the proposal but is not referenced as a task leader, the person does not need to be listed on the PTC form.		
Subprovider Information Good (Criterion C-11)	Verify that the subprovider firms identified with "yes" under the column labeled "Subprovider is Part of the Team" are consistent with those identified as part of the team on the PTC. This form must include the subprovider name and address. If a subprovider listed on the PTC is not included on the form, the proposal package will not be disqualified. Minor discrepancies such as missing signature, email address, phone number, and/or spelling errors, will not be subject for DQ.		
Overall Consistent (Criterion C-12)	The project team is consistent, as presented in the PTC, NLC Template, CCIS, and DBE Subprovider Contact Information form. A minor discrepancy such as an inconsistent spelling does not automatically disqualify the proposal package, provided the intent is clear. If the makeup of the project team is not obvious, however, the proposal package is non-responsive.		
Screening Determination (Criterion C-13)	The screener must determine if the proposal package passes or fails the minimum qualifications as specified in the RFP. If the proposal package passes, it shall be long-listed for evaluation. If the proposal package fails, it shall be considered non-responsive and disqualified from further consideration. The decision will be confirmed by the procurement engineer and service center manager in the subsequent screening groups.		



# Screening Checklist – Non-Federal (HUB)



Proposal Screening Checklist Non-Federal Process (HUB)			
Criteria	RFP Requirements	Pass	Fail
Cover Page Certifications (Criterion B-1)	All the certification statements are checked yes.		
Cover Page Screening (Criterion B-2)	The Prime Provider Project Manager is an employee of the prime firm and has entered the required license information. The project manager identified in the cover page questionnaire must match the project manager listed in the Proposal or the Proposal will be considered non-responsive. If required in the solicitation, the Deputy PM is listed on the cover page, is an employee of the prime firm, and has entered the required license information.		
Prohibited Agency (Criterion C-1)	Per Govt. Code 2252.152, etc., Texas agencies are prohibited by law from conducting business with certain companies listed on the State Comptroller's webpage, which also includes other prohibited entities. Check all the lists located at the link below for Prime Provider Name. <a href="https://comptroller.texas.gov/purchasing/publications/divestment.php">https://comptroller.texas.gov/purchasing/publications/divestment.php</a>		
Proposal within Page Limits (Criterion C-2)	The number of pages within the proposal package does not exceed the number of pages specified in the RFP. If the proposal contains more pages than specified, only the correct number of pages will be scored, the rest will be omitted. This is not a disqualification.		
Proposal Formatted Correctly (Criterion C-3)	The proposal is in substantial compliance with the remainder of the formatting requirements identified in the RFP. A proposal will not be disqualified for minor formatting issues.		
Not Precluded (Criterion C-4)	If the solicitation includes a preclusion statement, verify that the prime provider and all subcontractors are not precluded from competing for the advertised contract. Address any disclosure or other requirement related to the management of conflicts of interest, as applicable.		
Follows Core Team Restrictions (Criterion C-5)	If the solicitation includes a core team restriction statement, verify that the core team members are not core team members on other teams competing for this solicitation or others in this wave as applicable.		
PTC HUB Status Good (Criterion C-6)	Each subcontractor listed to meet the assigned HUB goal has acceptable HUB Expire date or Off HUB date. A firm's HUB certification is acceptable if the firm's HUB status is Active and its HUB Expire Date is current. Refer to the "Verification of HUB Certifications, Guidance and Instructions."  It is not necessary to check the NIGP codes if the provider has the applicable precertification qualifications.		
HUB Subcontracting Plan (HSP) (Criterion C-7)	The proposal package includes a completed HSP using the most current version. Using a different version is a reason for disqualification. Make a note in the comments and on the HSP review form. Use the HSP Review Form to review for applicability. (Each HSP must have a completed HSP Review Form 2576.)  For all non-compliant HSPs, obtain concurrence from CIV-HUB. The Proposal will be considered non-responsive if the HSP is not signed by the provider.		

Proposal Screening Checklist Non-Federal Process (HUB)			
Criteria	RFP Requirements	Pass	Fail
PTC Task Leaders Precertified (Criterion C-8)	The task leader for each work category is precertified in the category. If not, verify the status of the firm proposed to provide the task leader. If the firm has active precertification status and employs at least one individual that is precertified in the work category, do not disqualify. A firm providing a task leader must have active precertification status in that category in the CCIS database: <a href="http://www.dot.state.tx.us/des/precert/precert1.htm">http://www.dot.state.tx.us/des/precert/precert1.htm</a> as of the Proposal deadline date.  If the firm is inactive, and the Proposal closing date was on or before March 31, and the screening is performed after March 31, then additional steps are required to verify renewal status. See the PEPS guidance: Firm Renewal Status and Verification of Precertification Guidance and Instructions.		
PTC Task Leaders Consistent (Criterion C-9)	A task leader identified in the Proposal should match the task leader listed on the PTC form for the same Work Category or the Proposal may be considered non-responsive. Not all task leaders on the PTC form need to be mentioned in the Proposal. If a person is mentioned in the Proposal but is not referenced as a task leader, the person does not need to be listed on the PTC form.		
Subprovider Information Good (Criterion C-10)	Verify that the subcontractor firms identified with "yes" under the column labeled "Subprovider is Part of the Team" are consistent with those identified as part of the team on the PTC. This form must include the subcontractor name and address. If a subcontractor listed on the PTC is not included on the form, the Proposal package will not be disqualified. Minor discrepancies such as missing signature, email address, phone number, and/or spelling errors, will not be subject for DQ.		
Overall Consistent (Criterion C-11)	The project team is consistent, as presented in the PTC, NLC Template, CCIS, and HSP (state funded HUB). A minor discrepancy such as an inconsistent spelling does not automatically disqualify the Proposal package, provided the intent is clear. If the makeup of the project team is not obvious, however, the Proposal package is non-responsive.		
Screening Determination (Criterion C-12)	The screener must determine if the Proposal package Passes or Fails the minimum qualifications as specified in the solicitation. If the Proposal package passes, it shall be long-listed for evaluation. If the Proposal package fails, it shall be considered non-responsive and disqualified from further consideration. The decision will be confirmed by the procurement engineer and service center manager in the subsequent screening groups.		



# Screening Checklist – Non-Federal (DBE)



Proposal Screening Checklist Non-Federal Process (DBE)			
Criteria	RFP Requirements	Pass	Fail
Cover Page Certifications (Criterion B-1)	All the certification statements are checked yes.		
Cover Page Screening (Criterion B-2)	The Prime Provider Project Manager is an employee of the prime firm and has entered the required license information. The project manager identified in the cover page questionnaire must match the project manager listed in the Proposal or the Proposal will be considered non-responsive. If required in the solicitation, the Deputy PM is listed on the cover page, is an employee of the prime firm, and has entered the required license information.		
Prohibited Agency (Criterion C-1)	Per Govt. Code 2252.152, etc., Texas agencies are prohibited by law from conducting business with certain companies listed on the State Comptroller's webpage, which also includes other prohibited entities. Check all the lists located at the link below for Prime Provider Name. <a href="https://comptroller.texas.gov/purchasing/publications/divestment.php">https://comptroller.texas.gov/purchasing/publications/divestment.php</a>		
Proposal within Page Limits (Criterion C-2)	The number of pages within the proposal package does not exceed the number of pages specified in the RFP. If the proposal contains more pages than specified, only the correct number of pages will be scored, the rest will be omitted. This is not a disqualification.		
Proposal Formatted Correctly (Criterion C-3)	The proposal is in substantial compliance with the remainder of the formatting requirements identified in the RFP. A proposal will not be disqualified for minor formatting issues.		
Not Precluded (Criterion C-4)	If the solicitation includes a preclusion statement, verify that the prime provider and all subcontractors are not precluded from competing for the advertised contract. Address any disclosure or other requirement related to the management of conflicts of interest, as applicable.		
Follows Core Team Restrictions (Criterion C-5)	If the solicitation includes a core team restriction statement, verify that the core team members are not submitted as core team members on other teams competing for this solicitation or others in this wave as applicable.		
PTC HUB Status Good (Criterion C-6)	Each subcontractor listed to meet the assigned HUB goal has acceptable HUB Expire date or Off HUB date. A firm's HUB certification is acceptable if the firm's HUB status is Active and its HUB Expire Date is current. Refer to the "Verification of HUB Certifications, Guidance and Instructions."  It is not necessary to check the NIGP codes if the provider has the applicable precertification qualifications.		
HUB Subcontracting Plan (HSP) (Criterion C-7)	The proposal package includes a completed HSP using the most current version. Using a different version is a reason for disqualification. Make a note in the comments and on the HSP review form. Use the HSP Review Form to review for applicability. (Each HSP must have a completed HSP Review Form 2576.)  For all non-compliant HSPs, obtain concurrence from CIV-HUB. The Proposal will be considered non-responsive if the HSP is not signed by the provider.		

Proposal Screening Checklist Non-Federal Process (DBE)			
Criteria	RFP Requirements	Pass	Fail
PTC Task Leaders Precertified (Criterion C-8)	The task leader for each work category is precertified in the category. If not, verify the status of the firm proposed to provide the task leader. If the firm has active precertification status and employs at least one individual that is precertified in the work category, do not disqualify. A firm providing a task leader must have active precertification status in that category in the CCIS database: <a href="http://www.dot.state.tx.us/des/precert/precrt4.htm">http://www.dot.state.tx.us/des/precert/precrt4.htm</a> as of the Proposal deadline date.  If the firm is inactive, and the Proposal closing date was on or before March 31, and the screening is performed after March 31, then additional steps are required to verify renewal status. See the PEPs guidance: Firm Renewal Status and Verification of Precertification Guidance and Instructions.		
PTC Task Leaders Consistent (Criterion C-9)	A task leader identified in the Proposal should match the task leader listed on the PTC form for the same Work Category or the Proposal may be considered non-responsive. Not all task leaders on the PTC form need to be mentioned in the Proposal. If a person is mentioned in the Proposal but is not referenced as a task leader, the person does not need to be listed on the PTC form.		
Subprovider Information Good (Criterion C-10)	For federally funded contracts, verify that the subprovider firms identified with "yes" under the column labeled "Subprovider is Part of the Team" are consistent with those identified as part of the team on the PTC. This form must include the subprovider name and address. If a subprovider listed on the PTC is not included on the form, the Proposal package will not be disqualified. Minor discrepancies such as missing signature, email address, phone number, and/or spelling errors, will not be subject for DQ.		
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How do I find the Screening Checklist?





## Engineering, architectural, and surveying consultants



### Resources

[Eligible firms, forms, and state laws & rules »](#)

## Resources



Firms eligible to do business with TxDOT

[Learn more »](#)



State laws and rules

[Learn more »](#)

### Additional resources

- [Screening checklist: non-federal process \(DBE\)](#)
- [Screening checklist: non-federal process \(HUB\)](#)
- [Screening checklist: federal process](#)



Attachment 1: Cover Page / Questionnaire

Attachment 2: Proposal

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

Attachment 4: Subprovider Contact Information

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

Attachment 6: HUB Subcontracting Plan (HSP) *(Non-Federal)*

# Attachment 1: Cover Page / Questionnaire



## Question Set 1: Cover Page Template

### Question Set 1 Instructions

Complete each question in the Question Set. This questionnaire becomes the cover page for your response to the solicitation.

For the General questions - type the required information in the Comment column.

For the Certification questions - select a response of "YES" or "NO" using the dropdown in the Response column.

For the Attestation questions - type the required information in the Comment column.

For the Response Submittal Contents questions - select a response of "INCLUDED" or "NOT INCLUDED" using the dropdown in the Response column.

#	Question	Response	Comment
<b>GENERAL</b>			
1.1.1	Prime Provider (legal firm name):	-	
1.1.2	Texas Identification Number (TIN) - The TIN is a number assigned by the Texas Comptroller of Public Accounts to payees who contract with a state agency. If Prime Provider does not have one, include the federal Employer Identification Number (EIN) or use NONE. This number is not the same as the Vendor ID number requested on the Project Team Composition (PTC) Form.	-	
1.1.3	OCIS Seq ID	-	
<b>CERTIFICATION</b>			
1.2.1	The Prime Provider Firm certifies that the prime firm and all subprovider firms performing engineering, architecture, or surveying services are registered or licensed with the appropriate State licensing Board (Texas Board of Professional Engineers and Land Surveyors or Texas Board of Architectural Examiners), and will maintain active status while completing any work authorizations that may result from the contract, if awarded.		
1.2.2	The Prime Provider Firm certifies that the individuals on the project team are currently employed by either the prime provider firm or a subprovider firm that has been identified as part of the team.		
1.2.3	The Prime Provider Firm certifies that a Professional Engineer, Registered Architect, or Professional Land Surveyor (as specified in the Prime Provider Certification Statements section of the solicitation), registered or licensed in Texas, will sign and seal the work to be performed on the contract.		
1.2.4	The Prime Provider Firm certifies that the prime firm and all subprovider firms are registered, as required, with the Texas Secretary of State's office to do business in the State of Texas with the legal firm name as indicated on this questionnaire and on the Project Team Composition Form.		
1.2.5	The Prime Provider Firm certifies that it will perform at least 30 percent of the contracted work with its own work force.		
1.2.6	The Prime Provider Firm certifies that neither the prime provider firm, nor any of the subprovider firms on the team, are prohibited from entering into a contract with TxDOT as a result of a financial interest as defined under Texas Govt Code Sec. 2261.252(b). (Reference the Conflict of Interest section of this solicitation for additional information.)		

<b>ATTESTATION</b>			
1.3.1	Full Name of Prime Provider's Project Manager. By completing and submitting this questionnaire, the person listed as the Prime Provider's Project Manager: 1) is certifying that he or she acknowledges and agrees with the certification statements in this questionnaire, and 2) is certifying that the information in the response represents the knowledge and experience of the Project Manager, the Prime Firm, and the subprovider firms (if any).	-	
1.3.2	Date Certified	-	
1.3.3	Prime Provider's Project Manager's TBPELS/TBAE License Number:	-	
1.3.4	Prime Provider's Applicable TBPELS/TBAE Firm Registration Number:	-	
1.3.5	Project Manager's Email Address:	-	
1.3.6	Project Manager's Address:	-	
1.3.7	Project Manager's Phone Number:	-	
1.3.8	Printed Name of Prime Provider's Deputy Project Manager	-	
1.3.9	Prime Provider's Deputy Project Manager's TBPELS/TBAE License Number:	-	
<b>RESPONSE SUBMITTAL CONTENTS</b>			
1.4.1	Attachment 1 Cover Page		
1.4.2	Attachment 2 Proposal		
1.4.3	Attachment 3 Project Team Composition Form (Part 1, 2 & 3)		
1.4.4	Attachment 4 Subprovider Contact Information		
<b>22 Questions</b>			<b>0.00% Complete</b>



Instructions are in the first tab of the Questionnaire

## Question Set 1: Cover Page Template

### Question Set 1 Instructions

Complete each question in the Question Set. This questionnaire becomes the cover page for your response to the solicitation.

For the General questions - type the required information in the Comment column.

For the Certification questions - select a response of "YES" or "NO" using the dropdown in the Response column.

For the Attestation questions - type the required information in the Comment column.

For the Response Submittal Contents questions - select a response of "INCLUDED" or "NOT INCLUDED" using the dropdown in the Response column.

Must use the firm's legal name as registered with the Texas Comptroller of Public Accounts.

Check for completeness and accuracy.



## Potential reasons for disqualification:

Not all “Certification” questions were answered with a “Yes”.

Cover Page was not filled out completely.

Project Manager or Deputy PM did not meet requirements.



Attachment 1: Cover Page / Questionnaire

Attachment 2: Proposal

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

Attachment 4: Subprovider Contact Information

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

Attachment 6: HUB Subcontracting Plan (HSP) *(Non-Federal)*





## Proposal Screening Checklist

Criteria	RFP Requirements	Pass	Fail
Proposal within Page Limits (Criterion C-3)	The number of pages within the proposal package does not exceed the number of pages specified in the RFP. If the proposal contains more pages than specified, only the correct number of pages will be scored, the rest will be omitted. This is not a disqualification.		
Proposal Formatted Correctly (Criterion C-4)	The proposal is in substantial compliance with the remainder of the formatting requirements identified in the RFP. A proposal will not be disqualified for minor formatting issues.		



### Formatting Requirements

3. The Proposal **must:**
  - a. Be legible when printed on 8.5 inches by 11 inches paper (11-point Calibri font is recommended, unreadable text will be ignored);
  - b. Include adequate margins (a minimum margin of 0.5 inches is recommended, text not printed due to inadequate margins will be ignored);
  - c. Include the prime firm name on each page;
  - d. Include the solicitation number on each page; and,
  - e. Include page numbers on each page.



### Potential reasons for disqualification:

Missing Prime Firm Name on each page.

Missing Solicitation Number on each page.

Missing page numbers.

False Statements.



Potential reasons for disqualification:

# INCONSISTENCY

**VERY IMPORTANT:** The Submittal must be consistent throughout all attachments!

Example:

If you mention somebody as a Task Leader in the Proposal, they must be the Task Leader in the Project Team Composition (PTC).





Potential reasons for disqualification:

**PRECLUSIONS:** A “Preclusion Document” will be posted with the RFP (as applicable).

**CORE TEAM RESTRICTIONS:** Core Team Restriction instructions will be included in the RFP (as applicable).

# Submittal (Proposal) Package Contents



Attachment 1: Cover Page / Questionnaire

Attachment 2: Proposal

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## DBE Goals - Federal (DBE) & Non-Federal (DBE)



Assigned DBE goal must be met, or it will be considered 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 in order to count toward the DBE goal.



## Importance of NAICS codes

DBE Goal = 17.0%		
Firm	Estimated percentage of work	DBE%
Prime Firm A	82%	
Sub B	10%	10%
Sub C	6%	6%
Sub D	2%	2%
	100%	18%

DBE Goal = 17.0%		
Firm	Estimated percentage of work	DBE%
Prime Firm A	82%	
Sub B	10%	10%
Sub C	6%	6%
Sub D	2%	0%
	100%	16%



## Administrative Qualifications (AQ)

### Federal (DBE)

- Firms providing engineering & design (E&D) services must be AQ (FAR compliant rate) by the proposal deadline **or** be eligible for the safe harbor rate.
- Firms not providing engineering & design services are not required to have an indirect cost rate.



## Exception to Administrative Qualifications – Federal (DBE)

### ENGINEERING AND DESIGN RELATED SERVICES EXPLANATIONS FORM - Non Administratively Qualified Firms

15. For a category that is identified as an engineering and design (E&D) related service, each firm that is indicated as performing a percentage of work in the category is required to be administratively qualified.

Exception: If the portion of the work in the category that the firm is providing is a non-engineering support task, such as traffic counting, that firm is not required to be administratively qualified; however, the prime provider firm must provide an explanation on the PTC form. For example: If part 1 of the PTC form shows that a firm is not administratively qualified, the firm name will be shown in red text on part 3 of the form. If a non-administratively qualified firm is assigned to perform any percentage of work on a category designated as E&D, the prime firm must include an explanation that identifies the non-engineering work being performed and a description of the work, such as “providing a non-engineering support task - traffic counting”.



## Administrative Qualifications

### Non-Federal (DBE) & Non-Federal (HUB)

- AQ is not required to compete for solicitation.
- Exempted non-engineering firms are not required to have an indirect cost rate.
- Firms not subject to exemption have two options:
  - Be AQ by selection notification (FAR compliant rate)
  - Accept the state rate of 120%



## HUB Goals - Non-Federal (HUB)

Assigned HUB goal % is an “aspirational” goal.

Prime providers do not count towards the HUB Goal.

HUB goal %'s and Work Categories listings must be consistent with the HSP.



## Pre-Certifications

Task Leaders must be pre-certified for their respective field.

Firm must have an active status on day of closing

- Remember - Firm's active status in CCIS **needs** to be renewed annually

Note: CCIS data Date (bottom left on page 2 of 3)

Provide comments when / if needed:

- PDF Text Tools
- E&D Explanation button on Federal PTC (not on State)





Proposal Screening Checklist			
Criteria	RFP Requirements	Pass	Fail
PTC Task Leaders Consistent (Criterion C-10)	<u>A task leader identified in the proposal should match the task leader listed on the PTC form for the same Work Category or the proposal may be considered non-responsive.</u> Not all task leaders on the PTC form need to be mentioned in the proposal. If a person is mentioned in the proposal but is not referenced as a task leader, the person does not need to be listed on the PTC form.		





### **Project Manager or Task Leader Replacement during Selection:**

TxDOT rules allow the replacement of the key personnel during the selection process as described in this section; however, the team structure must remain intact until the contract is executed (i.e. subproviders included in the Proposal cannot be replaced or removed from the team prior to contract execution).



## How to find Pre-Certification, Administrative Qualifications, DBE and HUB Information?

Criteria	RFP Requirements	Pass	Fail
	DBE firm, and a subprovider does not have an acceptable NAICS code, the proposal will not be disqualified.		
PTC Firms AQ (Criterion C-8)	Each prime or sub firm proposing to perform engineering or design-related services must be either 1) administratively qualified (AQ) as of the proposal deadline date or 2) determined to be eligible by the TxDOT AQ Group to use the federal safe harbor rate as of the Proposal deadline date. Verify the AQ status of firms and save a highlighted copy in the procurement file on the P drive for each response (per PEPS AQ list posted at: <a href="https://www.txdot.gov/business/consultants/architectural-engineering-surveying/list-of-firms.html">https://www.txdot.gov/business/consultants/architectural-engineering-surveying/list-of-firms.html</a> ).		





## How to find Pre-Certification, Administrative Qualifications, DBE and HUB Information?

### Firms eligible to do business with TxDOT

**Resources**

- Firms eligible to do business with TxDOT
- State laws and rules
- PEPS forms

#### Active precertified firms

- [Active precertified firms](#)
- [Active precertified firms by work category](#)

**Administrative qualification status by firm**

- [Guidance](#)
- [Firms that are administratively qualified](#)
- [Firms participating in the Federal SafeHarbor Program](#)
- [Firms ONLY eligible to compete for TXDOT's state processes \(non-federal\)](#)
- [Non-engineering firms](#)

#### Directories

- [Texas Unified Certification Program \(TUCP\) DBE directory](#)
- [Centralized master bidders list - HUB director search](#)



*Important*

## Potential Disqualifications from Attachment 3: PTC

Print as an 11" x 17" using "Print Entire Workbook"

Must submit in PDF format

Must receive all three parts

# Submittal (Proposal) Package Contents



Attachment 1: Cover Page / Questionnaire

Attachment 2: Proposal

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

Attachment 4: Subprovider Contact Information

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

Attachment 6: HUB Subcontracting Plan (HSP) *(Non-Federal)*

# Attachment 4: Subprovider Contact Information

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

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).

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

<b>Signature (electronic signature accepted):</b>	<b>Date:</b>
<b>Printed (or typed) Name:</b>	<b>Printed (or typed) Title:</b>

# Attachment 4: Subprovider Contact Information

- Must submit in PDF format
- Provide all Sub providers contacted for teaming.
- Check for:
  - Accuracy
  - Consistency
  - Completeness
- Please sign and date.

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



# Submittal (Proposal) Package Contents



Attachment 1: Cover Page / Questionnaire

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



<b>Solicitation Number:</b> 601CT000004685			
<b>Non-Listed Category (NLC) Qualifications Template</b>			
<i>Instructions: All firms must complete the sections below. Print completed forms and submit with the solicitation response packet.</i>			
<b>Task Leader's Name:</b>		<b>Task Leader's Credentials:</b>	
<b>Task Leader's Firm Name:</b>			
<b>For the fields below, refer to the Solicitation. Refer to the Section Work Categories and the % of Work Per Category:</b>			
<b>NLC Number:</b>	NLC-1	<b>Required Experience (years):</b>	5
<b>NLC Name:</b>	Construction Record Keeper		
<b>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.)</b>			
Project No. 1	Start Date	End Date	Duration (mo.) 0
Project No. 2	Start Date	End Date	Duration (mo.) 0
Project No. 3	Start Date	End Date	Duration (mo.) 0

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



- Must submit in PDF format
- Be sure to include the experience that is being requested in chronological order.
- Be sure you meet all requirements
- Check for:
  - Completeness
  - Accuracy
- Do not provide false statements



**Solicitation Number:** 601CT000004685

**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:** [Redacted] **Task Leader's Credentials:** [Redacted]

**Task Leader's Firm Name:** [Redacted]

**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.	Start Date	End Date	Duration (mo.)
Project No. 1			0
[Redacted]			
Project No. 2			0
[Redacted]			
Project No. 3			0
[Redacted]			



## Potential Disqualifications from Attachment 5: NLC Template

### Task Leader:

- Be sure to meet the required years of experience.
- Be sure to meet the specific experience requested.
- Be sure they have the required credential(s) (as applicable).
- Be sure it is consistent with the other attachments.



# Submittal (Proposal) Package Contents



Attachment 1: Cover Page / Questionnaire

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Attachment 6: HUB Subcontracting Plan (HSP) *(Non-Federal)*



## HUB Subcontracting Plan (HSP)

Rev. 2/17

In accordance with Texas Gov't Code §2161.252, the contracting agency has determined that subcontracting opportunities are probable under this contract. Therefore, all respondents, including State of Texas certified Historically Underutilized Businesses (HUBs) must complete and submit this State of Texas HUB Subcontracting Plan (HSP) with their response to the bid requisition (solicitation).

**NOTE:** Responses that do not include a completed HSP shall be rejected pursuant to Texas Gov't Code §2161.252(b).

The HUB Program promotes equal business opportunities for economically disadvantaged persons to contract with the State of Texas in accordance with the goals specified in the 2009 State of Texas Disparity Study. The statewide HUB goals defined in 34 Texas Administrative Code (TAC) §20.284 are:

- **11.2 percent for heavy construction other than building contracts,**
- **21.1 percent for all building construction, including general contractors and operative builders' contracts,**
- **32.9 percent for all special trade construction contracts,**
- **23.7 percent for professional services contracts,**
- **26.0 percent for all other services contracts, and**
- **21.1 percent for commodities contracts.**

**- - Agency Special Instructions/Additional Requirements - -**

*In accordance with 34 TAC §20.285(d)(1)(D)(iii), a respondent (prime contractor) may demonstrate good faith effort to utilize Texas certified HUBs for its subcontracting opportunities if the total value of the respondent's subcontracts with Texas certified HUBs meets or exceeds the statewide HUB goal or the agency specific HUB goal, whichever is higher. When a respondent uses this method to demonstrate good faith effort, the respondent must identify the HUBs with which it will subcontract. If using existing contracts with Texas certified HUBs to satisfy this requirement, only the aggregate percentage of the contracts expected to be subcontracted to HUBs with which the respondent **does not** have a **continuous contract\*** in place for **more than five (5) years** shall qualify for meeting the HUB goal. This limitation is designed to encourage vendor rotation as recommended by the 2009 Texas Disparity Study.*



## Proposal Screening Checklist

Criteria	RFP Requirements	Pass	Fail
HUB Subcontracting Plan (HSP) (Criterion C-7)	<p>The proposal package includes a completed HSP using the most current version. Using a different version is a reason for disqualification. Make a note in the comments and on the HSP review form. Use the HSP Review Form to review for applicability. (Each HSP must have a completed HSP Review Form 2576.)</p> <p>For all non-compliant HSPs, obtain concurrence from CIV-HUB. The Proposal will be considered non-responsive if the HSP is not signed by the provider.</p>		



## Potential Disqualifications from Attachment 6: HUB Subcontracting Plan (HSP)

- Use the most current version.
- Read and follow all Instructions.
  - Check for consistency.
  - Check for completeness.
  - There may be many forms involved depending on method chosen
  - Sign the document
- Submit in PDF format



### HUB Subcontracting Plan (HSP) Rev. 2/17

In accordance with Texas Gov't Code §2161.252, the contracting agency has determined that subcontracting opportunities are probable under this contract. Therefore, all respondents, including State of Texas certified Historically Underutilized Businesses (HUBs) must complete and submit this State of Texas HUB Subcontracting Plan (HSP) with their response to the bid requisition (solicitation).

**NOTE:** Responses that do not include a completed HSP shall be rejected pursuant to Texas Gov't Code §2161.252(b).

The HUB Program promotes equal business opportunities for economically disadvantaged persons to contract with the State of Texas in accordance with the goals specified in the 2009 State of Texas Disparity Study. The statewide HUB goals defined in 34 Texas Administrative Code (TAC) §20.284 are:

- **11.2 percent for heavy construction other than building contracts,**
- **21.1 percent for all building construction, including general contractors and operative builders' contracts,**
- **32.9 percent for all special trade construction contracts,**
- **23.7 percent for professional services contracts,**
- **26.0 percent for all other services contracts, and**
- **21.1 percent for commodities contracts.**

#### -- Agency Special Instructions/Additional Requirements --

*In accordance with 34 TAC §20.285(d)(1)(D)(iii), a respondent (prime contractor) may demonstrate good faith effort to utilize Texas certified HUBs for its subcontracting opportunities if the total value of the respondent's subcontracts with Texas certified HUBs meets or exceeds the statewide HUB goal or the agency specific HUB goal, whichever is higher. When a respondent uses this method to demonstrate good faith effort, the respondent must identify the HUBs with which it will subcontract. If using existing contracts with Texas certified HUBs to satisfy this requirement, only the aggregate percentage of the contracts expected to be subcontracted to HUBs with which the respondent **does not** have a **continuous contract\*** in place for **more than five (5) years** shall qualify for meeting the HUB goal. This limitation is designed to encourage vendor rotation as recommended by the 2009 Texas Disparity Study.*





The screenshot shows the Texas Department of Transportation website. The navigation bar includes links for Discover Texas, Data and maps, Do business, Explore projects, Stay safe, and About. The main heading is "Historically Underutilized Business (HUB) Program". Below the heading is a sidebar with links to "Civil Rights events calendar", "Disadvantaged Business Enterprise/Airport Concessions (DBE/ACDBE)", "Small Business Enterprise Program", and "Historically Underutilized Business (HUB) Program". The main content area includes a paragraph about the program's purpose, a section for "Forms" with links to CPA HUB Subcontracting Plan and Prime Contractor Assessment Report Forms, HSP Progress Compliance Form, and HSP Change Request Form, and a section for "Rules and regulations" with links to Texas Statutes Government Code, Chapter 2161 and Texas Administrative Code, Title 34, Part 1 Chapter 20, Subchapter D, Division 1. A blue arrow points to the "Training resources" section, which includes a link to "HSP Completion Overview".

Discover Texas ▾ Data and maps ▾ Do business ▾ Explore projects ▾ Stay safe ▾ About ▾

Home / Business / Disadvantaged and Small Business Enterprise Programs

## Historically Underutilized Business (HUB) Program

**Disadvantaged and Small Business Enterprise Programs**

- Civil Rights events calendar
- Disadvantaged Business Enterprise/Airport Concessions (DBE/ACDBE)
- Small Business Enterprise Program
- Historically Underutilized Business (HUB) Program**

The [Historically Underutilized Business Program](#) was created to promote full and equal procurement opportunities for small, minority- and women-owned businesses. Companies interested in doing business with the state are encouraged to become HUB certified.

This is accomplished by completing an application and submitting it to the [Texas Comptroller of Public Accounts](#). Once approved, the company is considered "certified" and agencies using them on contracts receive credit toward meeting established HUB goals. The HUB Program is a state level program required by law and managed by the CPA.

- [Eligibility Requirements](#)
- [HUB Application](#)
- [HUB Directory](#)
- [Centralized Master Bidders List and HUB Search](#)

### Forms

- [CPA HUB Subcontracting Plan and Prime Contractor Assessment Report Forms](#)
- [HSP Progress Compliance Form](#)
- [HSP Change Request Form](#)

### Rules and regulations

- [Texas Statutes Government Code, Chapter 2161](#)
- [Texas Administrative Code, Title 34, Part 1 Chapter 20, Subchapter D, Division 1](#)

### Training resources

- [HSP Completion Overview](#)



For questions regarding the HSP, contact  
TxDOT Civil Rights Division

Texas Department of Transportation  
Civil Rights Division  
125 East 11th St.  
Austin, TX 78701

(512) 416-4700  
CIV\_HUB@txdot.gov



Attachment 1: Cover Page / Questionnaire

Attachment 2: Proposal

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Attachment 4: Subprovider Contact Information

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

Attachment 6: HUB Subcontracting Plan (HSP) *(Non-Federal)*

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



## Proposal Screening Checklist

Criteria	RFP Requirements	Pass	Fail
Overall Consistent (Criterion C-12)	<u>The project team is consistent</u> , as presented in the PTC, NLC Template, CCIS, and DBE Subprovider Contact Information form. A minor discrepancy such as an inconsistent spelling does not automatically disqualify the proposal package, provided the intent is clear. If the makeup of the project team is not obvious, however, the proposal package is non-responsive.		
Overall Consistent (Criterion C-11)	<u>The project team is consistent</u> , as presented in the PTC, NLC Template, CCIS, and HSP (state funded HUB). A minor discrepancy such as an inconsistent spelling does not automatically disqualify the Proposal package, provided the intent is clear. If the makeup of the project team is not obvious, however, the Proposal package is non-responsive.		

Federal

Non-Federal





## Proposal Screening Checklist

Criteria	RFP Requirements	Pass	Fail
Screening Determination (Criterion C-13)	<p><u>The screener must determine if the proposal package passes or fails the minimum qualifications as specified in the RFP. If the proposal package passes, it shall be long-listed for evaluation. If the proposal package fails, it shall be considered non-responsive and disqualified from further consideration. The decision will be confirmed by the procurement engineer and service center manager in the subsequent screening groups.</u></p>		



- 1 Be sure you download current documents.
- 2 Be sure to read and follow all instructions.
- 3 Use the Proposal Screening Checklist
- 4 If you have questions, follow RFP instructions and ask.



- 1 Check for updates to the RFP (Addendum)
- 2 Your submittal / proposal can be pulled back for a correction or revision.
- 3 Be sure you submit on time



Some people want it to happen, some wish it would happen, others make it happen.

- Michael Jordan







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San Antonio Service Center



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