



# TAPP CONTRACT# \_\_\_\_\_ PURCHASE REQUEST/RECEIVING DOCUMENT INSTRUCTIONS

## Overview

### General

Complete all requested information on the form. TAPP Contract #\_\_\_ is to include both your Region and the number of the TAPP (e.g. R3-01). All purchase requests must be received at least two (2) months prior to date needed in order to allow the competitive purchase process to be completed. Late receipt of purchase requests may result in a failure to secure the items requested. No action may be taken on the request if it is not signed by the same person in authority that signed the TAPP.

Use one Purchase Request document for each conference or meeting you plan. Provide all information needed for TWC to issue a Purchase Order, including vendor contact information for any preferred vendor(s).

The following sections list the details TWC will need for each type purchase in order to secure the goods or services you request.

Purchase Category	Texas Requirements
Purchases of \$5,000.01 to \$25,000	Three competitive bids from vendors listed on the Centralized Master Bidders Lists (CMBL). Two must be from a minority owned business. This may not always be possible due to geographical restrictions.
All Purchases over \$25,000	Solicitation package required so requesters should submit written Statement of Work. Will post on Electronic State Business Daily (ESBD). ESBD posting for 14 days with solicitation package.
Products over \$25,000	TWC must obtain external permission to make such a purchase. ESBD posting for 14 days with solicitation package.
Services over \$100,000	TWC must obtain external permission to make such a purchase. ESBD posting for 14 days with solicitation package.

### Standards of Conduct and Conflict of Interest

Individuals involved with the solicitation process certify they are not currently employed by, nor will they be receiving any compensation from, nor have they been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, or other consideration in connection with any proposal or involved Offeror in return for favorable consideration.

## Purchase Request Details

### Audio-Visual Equipment

Identify all audio-visual (AV) needs for each day for each meeting room(s) (e.g., mikes, overhead projector/screen, flip charts, etc.). Identify the type of microphones required for each day for each room (e.g., podium mike, wired portable mike, wireless hand-held portable mike, wireless lapel/lavaliere mike). Identify any special higher-cost requirements (e.g., laptop presentations through video LCD projector, telephone lines for computer linkage, etc.). AV equipment is rented by the day. Final AV requirements must be submitted at least 10 days before the conference/meeting starts and only after initial AV requirements have been fully vetted and submitted as approved.

### Copy/Duplication and Fax Services On-Site

If copy/duplication or fax services will be needed at the conference and you will use the conference location's business services to provide them, include a line item on your conference space rental request for copy/duplication and fax services and the estimated price. Include a copy of the estimate from the hotel. If you will need copy/duplication or fax services but the hotel does not provide them, include a line item on your purchase request with your best estimate of price and the local vendor(s) who can provide them.

## Curricula and Materials

Hosting agencies should prepare curricula for their conference and develop content for any conference handouts/takeaways they want to provide. If print copies are needed, complete a purchase request to TWC, specifying all requirements including:

- Size, layout, pictures or no pictures, graphics or no graphics
- Color and weight of paper
- Color ink or multi-colors
- Number of copies
- Draft or mockup of what is required (can be hand done)
- Delivery date, address, contact person, and contact person's email and phone number

If the hosting agency needs to hire a contractor to assist with curriculum development, provide a clear Statement of Work noting the goals and desired outcomes of the curriculum, time frame for development, due date, acceptance process, and required deliverables. Any purchase request of this type must be received at least four (4) months in advance in order to allow the contractor to complete the curriculum development.

## Hotel/Conference Space Rental

The approved request is to be provided to TWC at least two (2) months prior to the planned activity in order to allow sufficient time to complete the procurement. Space for large conferences should be requested at least three (3) months in advance. Conferences with a shorter lead-time are to be approved on an exception basis.

Complete and include a copy of the TAPP Purchase Request Hotel Detail Sheet with your request.

- If you have already selected the venue for your conference provide:
  - All contact information for the hotel/venue you selected
  - Copies of all bids/estimates received from both the selected and non-selected hotels
  - Starting & ending date of event
  - Brief statement of what is to be provided and price
- If you have not selected the venue for the conference provide:
  - Name & Type of event
  - Approved budget amount for the hotel/conference space
  - Preferred starting & ending date of event
  - Acceptable alternate dates, if any, if preferred dates not available
  - Desired location of activity (City, etc.)
  - Name and location of hotels to be considered, if any
  - Required number of hotel sleeping rooms by night (estimate carefully since hotels often have a penalty for significant under-use of sleeping rooms reserved in the contract)
  - Required meeting space needed each day, including breakout rooms. For each day, identify the period of time that the room(s) will be used ( ie. full day, 8 am-12 noon, etc.), the preferred room setup (ie. rounds, crescent rounds, classroom, theater, square, or u-shaped), the estimated number of attendees that each room should accommodate, and any other room requirements such as whether a head table and podium are needed.
  - Provide detailed conference/meeting schedule.
  - Identify planned breaks. Unless otherwise requested, conference/meetings in hotels will have complimentary coffee provided each morning before session starts, coffee and soft drinks during the morning break, and coffee and soft drinks during the afternoon break. If a different schedule is required, identify it. If requested, for smaller meetings, beverages such as juice, coffee, and soft drinks can be provided to attendees prior to the start of the session and be left in the room to remain available during the session. Food is not an approved expenditure unless the agency has been granted an exemption, a copy of which must be included with the purchase request.

## Office Supplies

TWC is required by state laws to purchase most office supplies from state contract vendors who have a lead time of 30 days to delivery. Therefore, request only special supplies required for the conferences and leave enough lead time for TWC to purchase and have the supplies delivered for the conference.

## Receiving

Place the date you received the requested goods or services in the column labeled "Received". Complete receiving for each line of the purchase request. If you expect to receive partial completion at one point and final completion later, submit the partial completion information as appropriate. The receiving documentation should also be signed by the same signature that signed the TAPP.

## Speakers

If you have already selected the speakers for your conference provide:

- All contact information for the speaker(s) you selected
- Copies of all bids/estimates received from both the selected and non-selected speaker(s)
- Starting & ending date of event
- Brief statement of what is to be provided and price

If you have not selected the speakers for the conference provide:

- List of potential speakers or other resource assistance
- Clear Statement of Work noting the goals and desired outcomes of the speaker
- Starting & ending date of event
- Date(s) and time(s) speaker(s) needed
- Acceptance process

Solicitations for any speakers will include the instruction that pricing is to cover all travel expenses as TWC will not pay separate travel or per diem to speakers.

## Special Conference Set-up Needs

Additional special conference/meeting set-up requirements (e.g., registration table, tables for handouts in meeting rooms, tables for displays of speaker or agency materials, message board for telephone messages, storage room for materials, additional rooms for piggy-back meetings, special trainer requirements, VIP requirements, etc.) must be identified and estimates provided.

## Staff Travel

Agencies are to pay staff travel to the conference as they would normally pay staff travel. Reimbursement will be requested from TWC based on federal travel allowances.