

PROCUREMENT PLAN

FOR THE

EIGHTH DISTRICT COURT OF APPEALS

Agency #228

November 27, 2023

(Revises November 2022 Plan)

PROCUREMENT PLAN - COURT OF APPEALS EIGHTH DISTRICT OF TEXAS

Purpose

Pursuant to the provisions of the Texas Government Code, Title 10, Subtitle D, Section 2155.132, this procurement plan has been developed. It is designed to reflect the key financial steps in the procurement process. It is also designed to identify the primary roles of key staff, both financial and legal counsel, in the procurement process as well as the levels of purchasing certification and related purchasing training to be attended by key staff.

1. Purchasing Organizational Chart

CHIEF JUSTICE – Head of the Court

Approves and signs all purchase orders. Renders legal advice when and if necessary.

JUSTICES

Serve as alternates in the absence of the Chief Justice.

CLERK OF THE COURT - Primary Purchaser

Determines and/or supervises all types of purchases for the Court based on the needs of the court and/or specifications provided by the Justices/staff.

Prepares and/or supervises preparation of all purchase orders.

Approves and signs all purchase orders.

Voucher preparation and entry for payments in USAS/CAPPS.

Reconciliation and/or purchasing reports.

With assistance from Office of Court Administration and the Chief Justice and/or Justices, determines information technology purchases for the court (including court's security system).

Prepares and orders information technology related purchases.

ACCOUNTANT and/or DEPUTY CLERKS

May assist Clerk with purchases or in preparing purchase orders.

Receive purchases and checks against purchase order.

May assist the Clerk in voucher preparation, USAS/CAPPS entries, and/or reconciliation and reporting of purchases.

2. Procurement Card Internal Procedures

The Court of Appeals Eighth District of Texas does not participate in the Procurement/Travel Card Program.

3. Protest Procedures

The Court of Appeals' primary purchaser is limited to informal telephone bids up to \$25,000. With that limit, the following protest procedures are as follows:

- (A) Any actual or prospective bidder or offeror who is aggrieved in connection with the solicitation, evaluation, or award of any informal bid may, by telephone, protest to the primary purchaser.
- (B) If the protest is not resolved by mutual agreement, the primary purchaser will consult with the Chief Justice or one of the Justices to settle and resolve the dispute concerning the solicitation or award of the informal bid. The Chief Justice or Justice may solicit written responses to the protest from all parties prior to determination.
- (C) If the protest is not resolved by mutual agreement, the Chief Justice or Justice will issue a written determination which sets forth the reason for the determination and the appropriate remedial action of the Court, which may include ordering the award of the informal bid void. The Chief Justice or Justice's written determination shall be the final administrative action of the Court.

4. Proprietary Justification

The Chief Justice, or in his/her absence any Justice of the Court, has the sole authority to approve and sign proprietary justification-letters.

Sina M. Palafox, Justice

Lisa Soto, Justice

5. Membership Fees

The Chief Justice, or in his/her absence any Justice of this Court, has the authority to approve court membership fees. Signature of the Justices of this Court are shown above in (4).

6. Training and Certification

The following employees in or involved with purchasing have or may be required to achieve the training listed below. Currently, this Court does not make purchases over \$25,000. Thus, we have no employees certified as a Certified Texas Purchaser.

Level One Training (BPP):

Elizabeth G. Flores (915) 546-2240 or

elizabeth.flores@txcourts.gov

Level Two Training (APP):

Elizabeth G. Flores

7. Authorized Purchasers

Primary Purchaser – The Clerk of the Court along with the Chief Justice and Justices, determine purchasing needs for the Court. The primary purchaser is authorized to purchase up to \$25,000 and prepares or approves/signs

purchase orders. IT (including court security) related purchases are determined by the Clerk of the Court along with the Chief Justice and Justices and are authorized to purchase up to \$25,000 and prepares IT related purchase orders which will be approved by the Clerk of the Court and/or Chief Justice/Justice. The Deputy Clerks or Accountant assist the Clerk of the Court by checking receipt of merchandise according to the purchase order. In the absence of the Chief Justice or Clerk of the Court, the Justice and Accountant or Deputy Clerks are authorized to prepare, approve, and sign any purchase order. The Court's Chief Justice/Justice and/or Office of Court Administration may provide legal advice when necessary.

8. Invitation for Bid (IFB) Form

Generally, the Court does not make purchases requiring the solicitation of formal bids. Therefore, an invitation for bid form is not needed in that all bids solicited are informal. If certain purchasing situations warrant a purchase over \$25,000, the Office of Court Administration and/or El Paso County will be asked to contract and coordinate with this Court on such a purchase pursuant to Section 791.025 of the Texas Government Code. In the event an invitation for bid form may be needed for a purchase under \$25,000, the Court will use the generic TPASS IFB form. If certain purchasing situations warrant such action, the 8th Court of Appeals will develop an internal IFB form. TPASS's requirements, bidder affirmations, and other appropriated information shall be included as an attachment to the form.

9. Internal Purchasing Procedures

The 8th Court of Appeals may make purchases under \$5,000 without soliciting bids. All spot purchases made by purchasing agents of the 8th Court of Appeals are reviewed and approved by the Clerk of the Court prior to issuing a purchase order.

10. Conflict of Interest Statement

All state employees working on a contract are required to fully disclose in writing any prior relationships he/she may have with a representative of an organization being considered for the contract to the Chief Justice/Justice of the Court. To ensure that the public interest is upheld and the highest professional standards are maintained, as well as to comply with state laws and TPASS guidelines, those purchases on behalf of the 8th Court of Appeals will have full disclosure form signed when appropriate.

In affirmation of Texas Government Code, Title 10, Subtitle D, Section 2155.003, each purchaser will sign a Conflict of Interest Statement (attached to this Plan). The signed statement will become part of the purchaser's personnel file and will be updated as needed.

11. Internal Purchasing Procedures for SAM (System for Award Management)

fka EPLS (Excluded Parties List System)

Prior to awarding any contracts, purchasing agents of the Court of Appeals Eighth District of Texas will check the list of vendors excluded from doing business at the federal level by utilizing the federal SAM. No contract should be awarded to any person/entity found on the EPLS system, pursuant to the Texas Government Code, Section 2155.077 and the Texas Administrative Code, Title 34, Part 1, Chapter 20, Subchapter C, Rule 20.102 and in compliance with Executive Order 13224 (Blocking Property and Prohibiting Transactions and Persons Who Commit, Threaten, to Commit, or Support Terrorism), dated September 23, 2001 as implemented by 31 CFR, Parts 500 through 599. A printed copy of the search results will be attached to the purchase order.

12. Two (2) Highest Priority Purchases

The two (2) highest priority purchases the Court expects to make that are not available through term contracts are:

- 1. Westlaw/West Pro Flex
- 2. Books and legal reference materials

13. Agency procedures for response to recommendations for delegated solicitation reviews by Contract Advisory Team (CAT)

The court procurement process does not include posting solicitations for purchasing in amounts (\$100K to \$1MM) related to "delegated purchases." This also applies to amounts (\$1MM or greater) as related to "major contracts." Therefore, the court does not currently have any such procedures. The court will address recommendations as provided by the Contract Advisory Team (CAT) in the future should the court be required to request a review of any solicitation/procurement meeting the dollar amounts as outlined in the contract Management Guide (CMG) and/or State Procurement Manual.

Approved this 20th day of November, 2023.

Gina M. Palafox, Justice

Lisa Soto, Justice

CONFLICT OF INTEREST

No member of the Court or any employee or appointee of the Clerk shall be interested in, or in any manner connected with, any contract or bid for furnishing supplies, materials, services, and equipment of any kind to any agency of the State of Texas. Neither shall any member or employee or appointee, under penalty of dismissal, accept or receive from any person, firm, or corporation to whom any contract may be awarded, directly or indirectly, by rebate, gift, or otherwise, any money or other thing of value whatever, nor shall any employee receive any promise, obligation, or contract for future reward or compensation from any such party.1

I certify that I have read and understand the above statement.					
Emp	oloyee Signature	Date			
Print	ted Name				
cc:	Personnel File Supervisor's File				

¹ Texas Government Code Title 10, Subtitle D, Chapter 2155.003

COURT OF APPEALS EIGHTH DISTRICT OF TEXAS INVITATION FOR BIDS

IF NOT BIDDING DO NOT RETURN THIS FORM. BIDDER AGREES TO COMPLY WITH	BID OPENING ▶ ## AM/PM ##-##-## REQUISITION NO. ▶ ##### # ##### #
ALL TERMS & CONDITIONS OF THIS IFB AGENCY TO INVOICE	PAGE X OF Y
	τ FAILURE TO SIGN WILL DISQUALIFY BIDτ
	AUTHORIZED SIGNATURE DATE
DESTINATION OF GOODS IF DIFFERENT THAN ABOVE	*By signing this bid, bidder certifies that if a Texas address is shown as the address of the bidder, bidder qualifies as a Texas Bidder as defined in TAC Rule 113.2 (68).
DELIVERY INDAYS, CASH DISCOUNT%DAYS WHEN BIDDING: Each bid must be placed in a separate envelope with bid opening date and requisition number annotated immediately below return address on SEALED BID ENVELOPE.	τ VENDOR ADDRESS AND IDENTIFICATION NUMBER τ
IF BIDDING, RETURN SEALED BIDS TO: COURT OF APPEALS EIGHTH DISTRICT OF TEXAS 500 E. SAN ANTONIO #1203, EL PASO, TX 79901	
OR HAND DELIVER TO: ROOM 1203, 12TH FLOOR (8:00 am - 5:00 pm)	
OR OVERNIGHT/EXPRESS MAIL TO: ADDRESS SHOWN ABOVE	
FAX NUMBER FOR BIDS & ADDENDUMS ONLY: 915 546-2252	
Vendor ID #	
THE ID NUMBER IS THE PAYEE IDENTIFICATION NUMBER ACCOUNTS OF TEXAS TO PROCESS PAYMENT FOR GOOPROVIDED ABOVE IF NUMBER IS NOT PREPRINTED. IF THE http://www.window.state.tx.us/taxinfo/taxforms/ap-152.pdf TO State Its.us/taxinfo/taxforms/ap-152.pdf	HIS NUMBER IS NOT KNOWN, PLEASE VISIT
PLEASE ALSO ENTER YOUR FEDERAL EMPLOYERS IDEN	TIFICATION NUMBER:
CHECK HERE IF YOU ARE A SOLE OWNERSHIP OR PARTI	NERSHIP AND COMPLETE SECTION 11:
n an effort to minimize identity theft, every company MUST have dentification number prior to award of a contract. 100-829-4933 or visit the following web site: http://www.gov-irs	e an Employer Identification Number (EIN), also known as a federal tax For information on obtaining your EIN, you may call com/main pho
In case of tie bids, one or more preferences described in	TX bidder* ally sensitive materials including recycled steel
() Vendors that meet or exceed air quality standards	

TERMS AND CONDITIONS: ITEMS BELOW APPLY TO AND BECOME PART OF BID. ANY EXCEPTIONS THERETO MUST BE IN WRITING.

1. BIDDING REQUIREMENTS:

- 1.1. Bidders must comply with all rules, regulations and statutes relating to purchasing in the State of Texas in addition to the requirements of this form.
- 1.2. Bids should be submitted on this form. Bidders must price per unit shown. Unit prices shall govern in the event of extension errors. If a price quotation is submitted as part of the bid, the quotation must be referenced on the bid document and signed by the bidder to establish formal linkage to the bid.
- 1.3. Bids must be time stamped at Court of Appeals Eighth District of Texas (Court) on or before the hour and date specified for the bid opening.
- 1.4. Late and/or unsigned bids will not be considered under any circumstances. Person signing bid must have the authority to bind the firm in a contract.
- Quote FOB destination, freight prepaid and allowed unless otherwise stated within the specifications.
- 1.6. Bid prices are requested to be firm for Court acceptance for 30 days from bid opening date. "Discount from list" bids are not acceptable unless requested. Cash discounts are not considered in determining an award. Cash discounts offered will be taken if earned.
- 1.7. Bidder should enter Texas Identification Number System (TINS) number, full firm name and address of bidder on the face of this form. Enter in the space provided, if not shown. Additionally, firm name should appear on each continuation page of a bid, in the block provided in the upper right hand corner.

- 1.8. Bid cannot be altered or amended after opening time. Alterations made before opening time should be initialed by bidder or his authorized agent. No bid can be withdrawn after opening time without approval by the Court based on an acceptable written reason.
- 1.9. Purchases made for State use are exempt from the State Sales tax and Federal Excise tax. Do not include tax in bid. Excise Tax Exemption Certificates are available upon request.
- 1.10. AWARD NOTICE: The State reserves the right to make an award on the basis of low line item bid, low total of line items, or in any other combination that will serve the best interest of the State and to reject any and all bid items at the sole discretion of the State. The State also reserves the right to accept or reject all or any part of any bid, waive minor technicalities and award the bid to best serve the interests of the State. Any contract may also be extended up to three months at the sole discretion of the State.
- Consistent and continued tie bidding could cause rejection of bids by the Court and/or investigation for antitrust violations.
- 1.12. The telephone number for FAX submission of bids is 915 -546-2252. This is the only number that will be used for the receipt of bids. The State shall not be responsible for failure of electronic equipment or operator error. Late, illegible, incomplete, or otherwise non-responsive bids will not be considered.
- Inquiries pertaining to IFBs must include the requisition number, class/item codes, and opening date.

2. SPECIFICATION:

- 2.1. Catalogs, brand names or manufacturer's references are descriptive only, and indicate type and quality desired. Bids on brands of like nature and quality will be considered unless advertised under Texas Government Code, Title 10, Subtitle D, Section 2155.067. If bidding on other than references, bid should show manufacturer, brand or trade name, and other description of product offered. If other than brand(s) specified is offered, illustrations and complete description of product offered are requested to be made part of the bid. Failure to take exception to specifications or reference data will require bidder to furnish specified brand names, numbers, etc.
- Unless otherwise specified, items shall be new and unused and of current production.
- 2.3. All electrical items must meet all applicable OSHA standards and regulations, and bear the appropriate listing from UL, FMRC or NEMA.
- 2.4. Samples, when requested, must be furnished free of expense to the State. If not destroyed in examination, they will be returned to the bidder, on request, at bidder's expense. Each sample should be marked with bidder's name and address, and requisition number. Do not enclose in or attach bid to sample.
- 2.5. The State will not be bound by any oral statement or representation contrary to the written specifications of this Invitation for Bids (IFB).
- Manufacturer's standard warranty shall apply unless otherwise stated in the IFB.

3. TIE BIDS:

Awards will be made in accordance with TAC Rule 113.6 (b) (3) and 113.8 (Preferences).

4. DELIVERY:

- 4.1. Show number of days required to place material in receiving agency's designated location under normal conditions. Delivery days mean calendar days, unless otherwise specified. Failure to state delivery time obligates bidder to deliver in 14 calendar days. Unrealistic delivery promises may cause bid to be disregarded.
- 4.2. If delay is foreseen, vendor shall give written notice to the Court and the ordering agency. Vendor must keep the Court and ordering agency advised at all times of status of order. Default in promised delivery (without accepted reasons) or failure to meet specifications authorizes the Court to purchase supplies elsewhere and charge full increase, if any, in cost and handling to defaulting vendor.
- 4.3. No substitutions permitted without written approval of Court.
- 4.4. Delivery shall be made during normal working hours only. unless prior approval has been obtained from ordering agency.

5. INSPECTION AND TESTS:

All goods will be subject to inspection and test by the State. Authorized Court personnel shall have access to supplier's place of business for the purpose of inspecting merchandise. Tests shall be performed on samples submitted with the bid or on samples taken from regular shipment. All costs shall be borne by the vendor in the event products tested fail to meet or exceed all conditions and requirements of the specification. Goods delivered and rejected in whole or in part may, at the State's option, be returned to the vendor or held for disposition at vendor's expense. Latent defects may result in revocation of acceptance.

AWARD OF CONTRACT:

A response to this IFB is an offer to contract based upon the terms, conditions, and specifications contained herein. Bids do not become contracts until they are accepted through an open market purchase order. The contract shall State of Texas. The factors listed in Texas Government Code, Title 10, Subtitle D, Section 2155.074, 2155.144, 2156.007, and 2157.003 shall also be considered in making an award when specified. Any legal actions must be filed in Travis County, Texas.

7. PAYMENT:

Vendor shall submit 2 copies of an itemized invoice showing State order number and agency requisition number on all copies. The State will incur no penalty for late payment if payment is made in 30 or fewer days from receipt of goods or services and an uncontested invoice.

PATENTS OR COPYRIGHTS: The vendor agrees to protect the State from claims involving

infringement of patents or copyrights.

VENDOR ASSIGNMENTS:

Vendor hereby assigns to ordering agency any and all claims for overcharges associated with this contract arising under the antitrust laws of the United States 15 U.S.C.A. Section 1, et seq. (1973), and the antitrust laws of the State of Texas, TEX. Bus. & Comm. Code Ann. Sec. 15.01, et seq. (1967).

10. BIDDER AFFIRMATION:

Signing this bid with a false statement is a material breach of contract and shall void the submitted bid or any resulting contracts, and the bidder shall be removed from all bid lists. By signature hereon affixed, the bidder hereby certifies that:

- The bidder has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with the submitted hid
- b. Neither the bidder nor the firm, corporation, partnership, or institution represented by the bidder, or anyone acting for such firm, corporation or institution has violated the antitrust laws of this State or the Federal Antitrust Laws (see section 9, above), nor communicated directly or indirectly the bid made to any competitor or any other person

- Pursuant to Section 2155,004. Government Code, the bidder has not received compensation for participation in the preparation of the specifications for this
- d. Pursuant to Section 231.006 (d), Family Code, re: child support, the bidder certifies that the individual or business entity named in this bid is not ineligible to receive the specified payment and acknowledges that this contract may be terminated and payment may be withheld if this certification is inaccurate.
- Under Section 2155.004, Government Code, the vendor certifies that the individual or business entity named in this bid or contract is not ineligible to receive the specified contract and acknowledges that this contract may be terminated and payment withheld if this certification is inaccurate.
- The Contractor shall defend, indemnify, and hold harmless the State of Texas, all of its officers, agents and employees from and against all claims, actions, suits, demands, proceedings, costs, damages, and liabilities, arising out of, connected with, or resulting from any acts or omissions of contractor or any agent. employee, subcontractor, or supplier of contractor in the execution or performance of this contract.
- g. Bidder agrees that any payments due under this contract will be applied towards any debt, including but not limited to delinquent taxes and child support that is owed to the State of Texas.
- h. Bidder certifies that they are in compliance with section 669,003 of the Government Code, relating to contracting with executive head of a State agency. If section 669.003 applies, bidder will complete the following information in order for the bid to be evaluated:

Mama	۰£	Former		
Name	ΩT	Former	THYP	CHILIVE:

Name of State Agency:	
Date of Separation from State Agency:	
Position with Bidder:	
Date of Employment with Bidder:	_

Bidder agrees to comply with Government Code 2155.4441, pertaining to service contract use of products produced in the State of Texas.

be governed, construed, and interpreted under the laws of the

engaged in such line of business.

- Contractor understands that acceptance of funds under this contract acts as acceptance of the authority of the State Auditor's Office, or any successor agency, to conduct an audit or investigation in connection with those funds. Contractor further agrees to cooperate fully with the State Auditor's Office or its successor in the conduct of the audit or investigation, including providing all records requested. Contractor will ensure that this clause concerning the authority to audit funds received indirectly by subcontractors through Contractor and the requirement to cooperate is included in any subcontract it awards.
- The Court of Appeals Eighth District of Texas (Court) is federally mandated to adhere to the directions provided in the President's Executive Order (EO) 13224, Executive Order on Terrorist Financing - Blocking Property and Prohibiting Transactions With Persons Who Commit, Threaten to Commit, or Support Terrorism, effective 9/24/2001 and any subsequent changes made to it via crossreferencing respondents/vendors with the Federal General Services Administration's Excluded Parties List System (EPLS, http://www.epls.gov), which is inclusive of the United States Treasury's Office of Foreign Assets Control (OFAC) Specially Designated National (SDN) list.

11. Pursuant to Section 231.006 (c), Family Code, bid must include Names and Social Security Numbers of each person with at least 25% ownership of the business entity submitting the bid. Enter Name & Social Security Numbers for each person. This information must be provided prior to contract award.

Name:
Social Security Number:

12. NOTE TO BIDDER:

Any terms and conditions attached to a bid will not be considered unless specifically referred to on this bid form and may result in disqualification of the bid.

13. The dispute resolution process provided for in chapter 2260 of the Texas Government Code must be used by the Court and the contractor to attempt to resolve all disputes arising under this contract.

14. NON-APPROPRIATION OF FUNDS:

The State's funds are contingent on the availability of lawful appropriations by the Texas Legislature. If the Texas Legislature fails to continue funding for the payments due under an order referencing this Contract, the order will terminate as of the date that the funding expires, and the State will have no further obligation to make any payments.

15. Information, documentation, and other material in connection with this solicitation or any resulting contract may be subject to public disclosure pursuant to Chapter 552 of the Texas Government Code (the "Public Information Act"). Any part of the solicitation response that is of a confidential or proprietary nature must be clearly and prominently marked as such by the respondent.

- 16. TECHNOLOGY ACCESS CLAUSE: The Vendor expressly acknowledges that state funds may not be expended in connection with the purchase of an automated information system unless that system meets certain statutory requirements relating to accessibility by persons with visual impairments. Accordingly, the Vendor represents and warrants to the qualified ordering entity that the technology provided to the qualified ordering entity for purchase is capable, either by virtue of features included within the technology or because it is readily adaptable by use with other technology, of:
 - a) Providing equivalent access for effective use by both visual and non visual means;
 - Presenting information, including prompts used for interactive communications, in formats intended for both visual and non visual use; and
 - Being integrated into networks for obtaining, retrieving, and disseminating information used by individuals who are not blind or visually impaired.

For purposes of this clause, the phrase "equivalent access" means a substantially similar ability to communicate with or make use of the technology, either directly by features incorporated within the technology or by other reasonable means such as assistive devices or services that would constitute reasonable accommodations under the Federal Americans with Disabilities Act or similar state or federal laws. Examples of methods by which equivalent access may be provided include, but are not limited to. keyboard alternatives to mouse commands and other means of navigating graphical displays and customizable display appearance.

16.1. "Exemption Declaration:

Pursuant to the provisions of the Texas Government Code, Chapter 2157.005(d) this requirement is for the purchase of a wireless communication device to be used by peace officers, firefighters, and other emergency response personnel to respond to a public safety emergency. The provisions of the Technology Access Clause do not apply."



INVITATION FOR BIDS RETURN SEALED BIDS TO: COURT OF APPEALS EIGHTH DISTRICT OF TEXAS 500 E. San Antonio Ave. #1203, El Paso, TX 79901-2408

BID OPENING ▶ ## AM/PM ## ## ##

REQUISITION NO. > ##### # ##### # PAGE X OF Y

VENDOR

(VENDOR NAME)

ITEM NO	CLASS & ITEM DE	SCRIPTION	QUANTITY U	INIT MAKE/MODEL	UNIT PRICE	EXTENSION
	(BID TEXT ENTRY HERE)					
					:	
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