

# **CONTRACT MANAGEMENT UNIT**

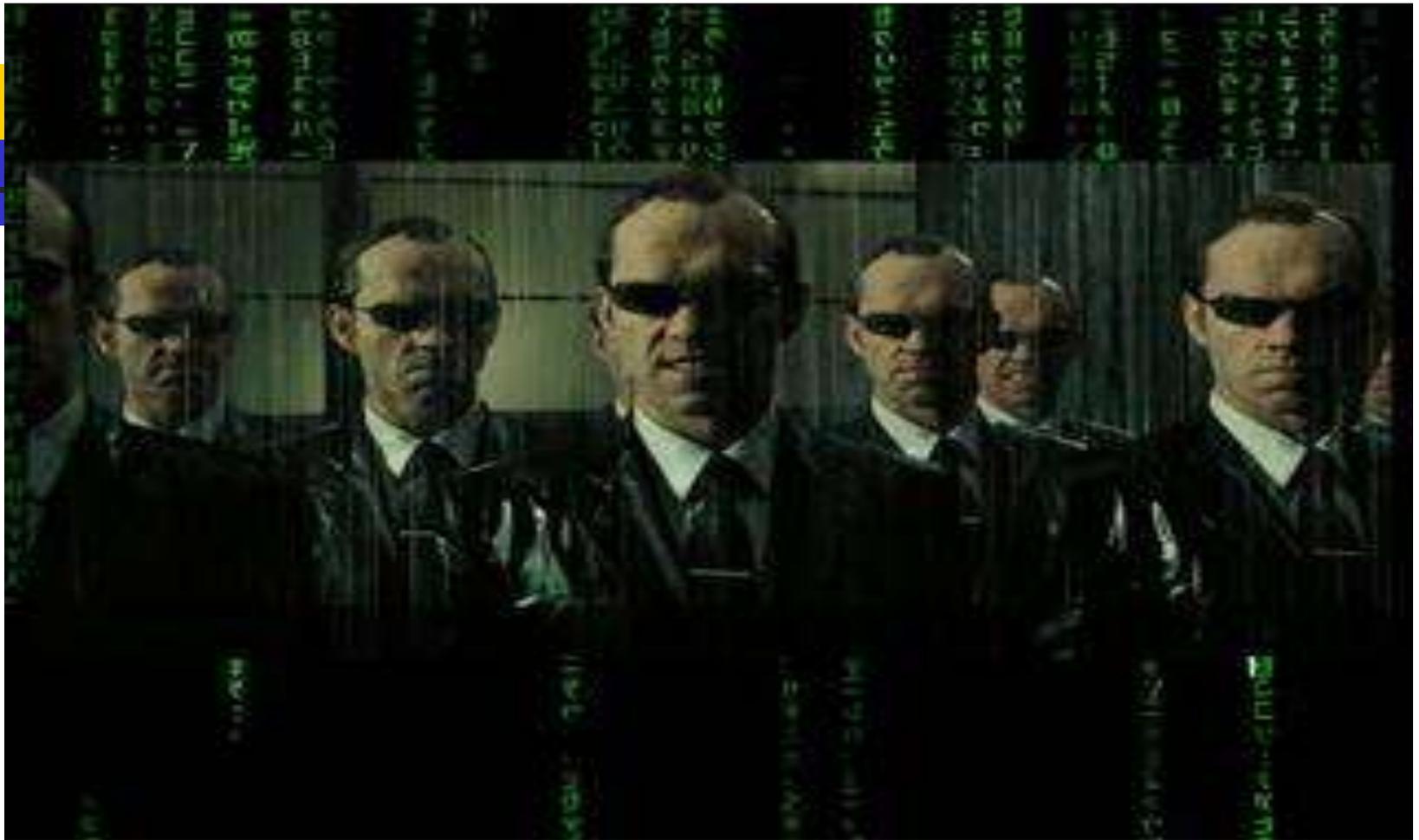
## **Division for Disease Control and Prevention Services**

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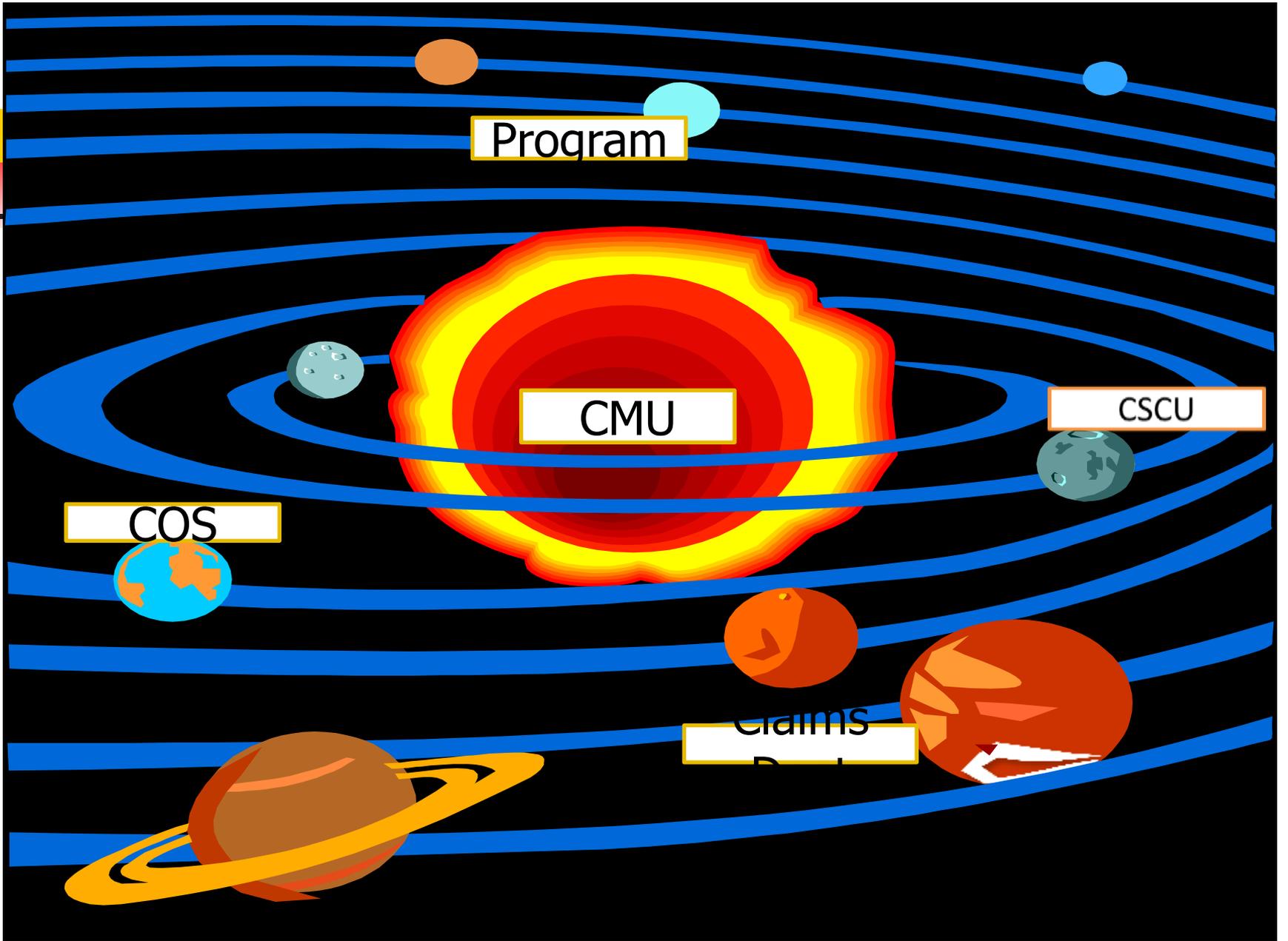
**HIV Prevention  
Contractors Meeting  
March 6, 2013**

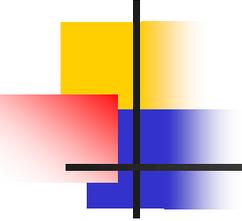


“It takes a village to raise a child.”



It takes several areas within an agency working together to develop and manage a contract.

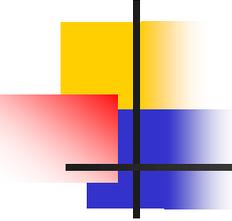




# Your CMU Team:

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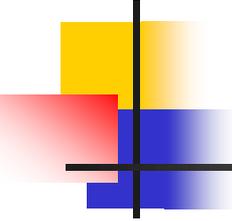
- Patty Melchior – CMU Director
- Debbie Bennett – Prevention Branch Manager
- Maria Lugo – Contract Manager for HIV & STD Prevention contracts
- Char Brooks– Contract Manager for HIV Care Services and Surveillance contracts
- Kendra Sturdevandt – Monitoring-Oversight Manager



# Contract Management Unit

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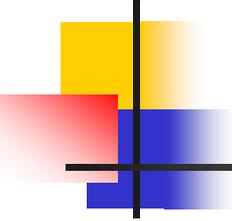
- Background
- Mission
- Structure
- Branches
  - Roles and Responsibilities



# Background

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- The CMU Centralizes the following functions in each division:
  - Contract planning
  - Contract negotiation
  - Contract management
  - Program compliance monitoring
  - Contract close-out

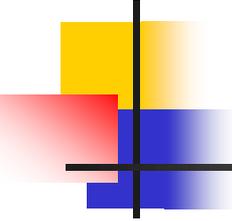


# Mission and Vision

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The Contract Management Unit facilitates the Division's contracting functions by:

- Supporting the work of programs in the goal of providing quality services through community partners; and
- Creating more efficient processes that serve both external and internal customers.



# Structure

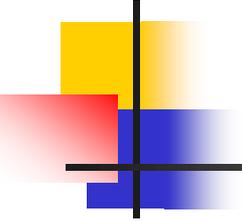
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The Contract Management Unit works as a team with program staff who are responsible for contract program monitoring and technical assistance.

The Unit Director is Patty Melchior.

The Unit's work is supported by two branches:

- Prevention Branch
  - Branch Manager, Debbie Bennett
- RHLS & Compliance Branch
  - Branch Manager, Susana K. Garcia

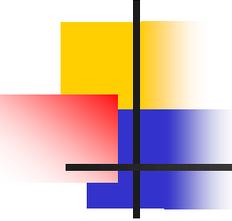


# Roles and Responsibilities

## Procurement and Management Branch

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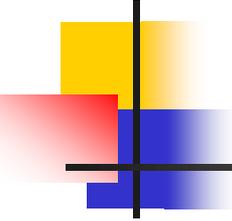
- Contract planning: Pre-solicitation development
- Overall RFP Development
- Bidders' Conferences and Proposal Review Processes
- Contract Negotiation, Budget Development
- Contract Development and Management
- Amendments/Revisions
- Subcontractor Data Verification (as needed)
- Contract file maintenance, (CMU is Office of Record for Monitoring files)
- Maintain/Analyze expenditures
- Provide Technical Assistance to Program & Contractors



# Contract Tips

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- Equipment Purchases approved by DSHS should be initiated within the first quarter of the term.
- Failure to initiate the equipment purchases may result in the loss of availability of funds.
- B-13 Purchase Voucher should be used to invoice monthly and can be accessed at:  
<http://www.dshs.state.tx.us/grants/forms/b13form.doc>
- If there are no expenses for a given month, Contractors must submit the invoice which states there are not reimbursable costs. The **zero voucher** satisfies with the monthly invoice requirement.



# Contract Tips

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Refer to your contract for Billing Instructions.

The Contractor must choose ONE of the following methods to submit their vouchers:

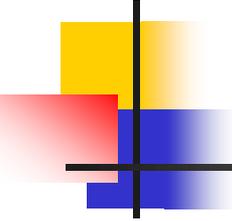
- **Electronically** to the email address: [invoices@dshs.state.tx.us](mailto:invoices@dshs.state.tx.us)

- **Hard Copy** to:

Claims Processing Unit, MC1940  
Texas Department of State Health Services  
1100 West 49th Street  
PO Box 149347  
Austin, TX 78714-9347

- **Fax** to: (512) 776-7442

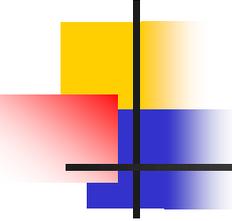
**Voucher submission must include supporting documentation.**



# Contract Tips

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- Other Important information:
  - Contractor's should review their contract Section II. Performance Measures for due dates and services delivery/activities to be provided during the contract term.
  - Contractor should review Subrecipient General Provisions. Information referenced in the provisions includes but is not limited to the following items:
    - Financial Status Reports
    - Equipment Management
    - Amendments and Revisions



# Contract Tips

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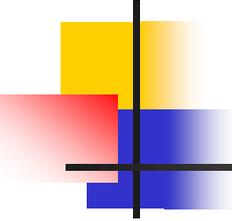
- **Amendment Vs. Revision:**

Changes that can be made without an amendment or prior approval:

- Contractor's contact person;
- Contact information (not staff changes) for key personnel; and
- Cumulative budget line item transfers that do not exceed 25% among direct cost category.

- Changes to indirect costs and equipment regardless to the amount **must** be done with an amendment.

- Please contact your Contract Manager to ensure proper processing of any contractual revisions or changes.



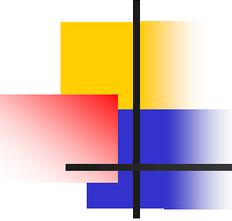
# Contract Tips

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**REMEMBER** When in doubt:

Call your Contract Manager Maria Lugo at 512-776-2189 or email [maria.lugo@dshs.state.tx.us](mailto:maria.lugo@dshs.state.tx.us)

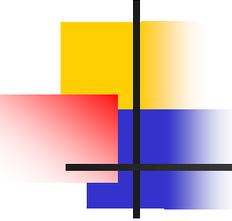




# CMU Monitoring and Oversight

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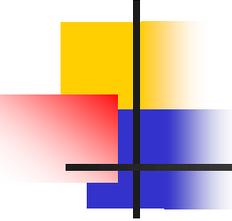
- Monitoring Oversight
  - Track and Monitor Reporting Requirements
  - Conduct On-site Reviews
- Desk Reviews
- Close Outs
  - Renewing Contract
  - Non-Renewing Contract
- Tracking and File Maintenance



# Contract Management and Procurement System

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- Contract Management and Procurement System (CMPS)
  - New DSHS Contracting System
    - Contractors received email – be sure you register to get future alerts
  - Expected to go live Spring 2013
  - CMU to enter 9/1 renewals
  - Contractor Registration
  - Contractor Training



# CMU Contacts

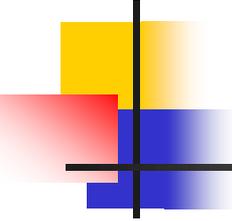
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- **Maria Lugo - Contract Manage**

- Phone: 512-776-2189
- E-mail: [maria.lugo@dshs.state.tx.us](mailto:maria.lugo@dshs.state.tx.us)

- **Kendra Sturdevandt - Monitoring and Oversight Manager**

- Kendra Sturdevandt
- Phone: 512-776-2178
- E-mail: [kendra.sturdevandt@dshs.state.tx.us](mailto:kendra.sturdevandt@dshs.state.tx.us)



# CMU Contacts

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- **Charlotte Brooks - Contract Manager**
  - Phone: 512-776-26539
  - E-mail: [charlotte.brooks@dshs.state.tx.us](mailto:charlotte.brooks@dshs.state.tx.us)
  
- **Debbie Bennett - Prevention Branch Manager**
  - Phone: 512-776-3206
  - E-mail: [debbie.bennett@dshs.state.tx.us](mailto:debbie.bennett@dshs.state.tx.us)