

Virtual meeting guidelines

For best results, please:



- Don't use video
- Mute your microphone
- Raise your virtual hand to talk
- Use the chat function to ask or respond to questions
- No AI note-taking tools are allowed per County policy

This session is being recorded

Consulting Services Program: Upcoming Changes

Training for Vendors
October 2024



Agenda

- Introductions
- What is changing
- What is not changing
- Key takeaways
- Wrap up



Purchasing and Contract Services team

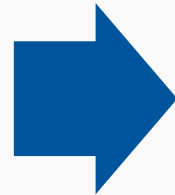


- Program Manager – Bria Boos
- Contract Analyst – Linda Champlin
- Administrative support – Nicole Pederson

What is changing?

Program name change

Consulting
Services Program
(CSP)



Professional
Technical Services
Roster (PTSR)

New addresses

Program page

- New URL: <https://hennepin.us/business/work-with-henn-co/professional-technical-services-roster>

Email address

- New email: ptsroster@hennepin.us
- Old email: pwbiz@hennepin.us

Professional technical services roster

Hennepin County maintains a roster of qualified and available vendors to provide professional technical services. The roster is generally used to award contracts for projects estimated to cost less than \$500,000. The county gives first consideration to emerging and small business enterprises that are [CERT](#) certified.

This roster was previous call the Consulting services program (CSP).

[Submit your questions or feedback](#)

Program manager, Brianna Boos
ptsroster@hennepin.us
Phone: 612-348-7930

Open all

+ Roster overview

+ Get on the roster

+ Work types

+ What to expect if selected for work

+ Training and resources

+ Roster reports

+ Current roster participants

+ Planned contracting opportunities

Revised work types

Work types

- Revised work types posted on the [program page](#)
- Updated to align with MnDOT and reflect project manager feedback
- Eliminated 'Community Engagement and Public Involvement' work type

Why did we make these changes?

- Eliminate confusion with IT-CSP
- For consistency throughout all county systems
- To align with MnDOT program and based on staff feedback

New principal agreement template

New principal agreement template (review on [program page](#))

- No longer contains template samples or appendices
- When your current principal (master) agreement expires, you will sign the new template
- Legal terms and conditions are roughly the same, but new template references work order process
- If work order requires additional project-related standards (e.g., CAD standards), they will be attached to the work order for that project

New roster dashboards

2 new roster dashboards

- [Vendor by work type](#)
- [Upcoming opportunities](#)

How to update your organization's information

- Do not submit a new application
- Email ptsroster@hennepin.us with the information that needs to be updated
- Review your organization's information for accuracy and that it reflects your correct work types

New dashboard for vendor by work type

New roster dashboard

- [Vendor by work type](#)

Professional Technical Services Roster – Find vendor by work type
To update your vendor information on this report, email ptsroster@hennepin.us

Filters:

Category:

Small business certification:

Work type:

Vendor:

Vendor summary

Vendors on roster: **335**

Category	Count
Architecture	198
Community Develop...	140
Transportation	102
Environment	99

Active certifications

Certification Type	Count
No active certification	211
Emerging small busin...	73
Small business	51

Vendor list [How to download table](#)

Vendor	All work types	Principal agreement number	Expiration	Small business certification	Contact name	Contact email
4Tom Thumb LLC	Office facilities, Public works maintenance shops and garages, Residential facilities, Transit facilities, Graphic design/ rendering/ mapping/ and imagery	PL00000899	11/30/25	Emerging small business	Tom Thumb	Tom.thumb@thumb.com
PaulBun Technical Services Inc	Corrections facilities, Historic preservation, Medical facilities, Office facilities, Public works maintenance shops and garages, Residential facilities, Transit facilities, Civil engineering, Commissioning and recommissioning, Electrical engineering, Mechanical engineering, Structural engineering, Building forensics, Computer aided facilities management (CAFM), Construction management, Cost estimating, Elevator and escalator, Facility and accessibility audits, Facility preservation, Fiber optic engineering and planning, Indoor air quality and industrial hygiene, Interior design and systems furniture, Move coordination, Roofing, Safety training and consulting, Security systems, Signage, Asbestos/ lead paint/ and regulated building materials, Solid waste and recycling services, Graphic design/ rendering/ mapping/ and imagery, Land use planning and urban design, Market analysis and studies, Archaeological studies, Architectural/history studies, Geomorphology studies, Energy contracting and marketing, Power plant and district energy engineering, Air quality analysis, Environmental documentation, Environmental property assessment and cleanup, Natural resources services, Noise analysis and abatement design, Landscape architecture, Bridge and structure design, Structural metals inspection, Construction contract administration and management, Construction inspection bridge construction, Construction inspector grading and base/ bituminous and concrete, Water resources services, Pedestrian and bicycle planning/ engineering/ and promotion, Roadway/ geometric layout/ and highway design, Value engineering (VE) study/workshop, Roadway lighting design, Temporary traffic control plan design and special provisions, Traffic engineering special studies, Traffic signal design, Traffic signal operations, Transit planning/ engineering/ and construction management	PL00000308	6/23/25	No active certification	Paul Bunyan	Paul.bunyan@bunyan.com

New dashboard for upcoming opportunities

New roster dashboard

- [Upcoming opportunities](#)

Upcoming PTSR Opportunities

Timing	Project Name	Description	Project Manager	Phone Number	Work Type
2025 Q1	Cedar Ave Phase 2 (HC# 2240700)	Preliminary Design and Engagement This contract will potentially be through the county's enterprise contracting program: https://www.hennepin.us/business/work-with-henn-co/supplier-portal	Emily Schultz	612-596-0569	Transportation – roadway: Roadway
2024 Q4	2025 Construction Contract Admin/Inspection	Construction Contract Administration, Inspection, Survey and Material Testing for Various Pedestrian Ramps throughout the County	Tony Schrempp	612-220-6235	Transportation - construction inspection and contract administration: Construction inspection grading base bituminous and concrete
2025 Q2	Mill Street Construction Admin Services (2182300)	Construction Admin, Inspection, Survey and Material Testing	mailto:jay.hill@hennepin.us	612-842-9469	Transportation - construction inspection and contract administration: Construction inspection grading base bituminous and concrete
2025 Q1	Sunset Drive Reconstruction (HC# 2182000)	Construction Contract Administration This contract will potentially be through the county's enterprise contracting program: https://www.hennepin.us/business/work-with-henn-co/supplier-portal	Tony Schrempp	612-220-6235	Transportation - construction inspection and contract administration: Construction contract administration and management
2025 Q1	Cedar Ave Phase 1 (HC# 2220200)	SUE investigation including utility potholing	Josh Porter	612-596-0820	Surveying and mapping: Subsurface utility engineering

Revised selection process: direct select

New:

- Directly select small businesses at a greater threshold

Same:

- Emphasis remains on using E/SBE firms when possible – CERT Program
- If a project is close to \$100K, small business goals (SMBE/SBE) may be applicable and will be evaluated – email will come from Compliance Specialist, cc'ing Roster staff

Revised selection process: new templates

New project templates

- Standard terms of participation for RFPs
- Scope of services
- Proposal template (optional)
- Fee schedule/budget (2 versions)

Generic version

Facility Services version: like existing schedule

- Direct select proposal request email template (will come from Project Manager, Purchasing staff will be cc'd on email)



Revised selection process: Request for Proposal (RFP)

Previous process	<ul style="list-style-type: none">• Project Managers within departments would reach out via email• 'Letters of Interest' were sometimes sent ahead of RFP
New process	<ul style="list-style-type: none">• New standard RFP templates• Centralized through Purchasing and Contract Services department• No 'Letters of Interest' – you will not be penalized for not responding to an RFP• RFP will be posted in Hennepin County's Supplier Portal and proposals accepted only through the Supplier Portal• RFP questions submitted to Purchasing department (ptsroster@hennepin.us) and answered via addendum in the Supplier Portal for all vendors to view at the same time

Request for proposals in Supplier Portal

[Supplier Portal](#) is Hennepin County's online system for contracting opportunities

Roster members invited to exclusive non-public RFPs when services are needed

Vendors **must** be registered in the Supplier Portal to receive invitations to these non-public contracting opportunities and submit proposals

Supplier Portal

Supplier Portal terminology

Term	Description
Supplier	<ul style="list-style-type: none">• A term used for a vendor that is doing work for the county• Sometimes seen in the portal when you need to “take action” (e.g., submitting a “supplier change request” to update your organization’s information)
Event	<ul style="list-style-type: none">• Online posting/invitation to submit a response to a County contract opportunity• All events under the Professional Technical Services Roster (PTSR) are nonpublic, available only to roster members by invitation only• Most events are public and open for anyone to respond to
Bid	<ul style="list-style-type: none">• A term used throughout all events (even RFPS) to refer to a response to an event• Often seen on buttons indicating you need to “take action” (e.g., “bid on event” or “submit bid”)

Demonstration: Supplier Portal

Registering & submitting a proposal

Supplier Portal resources

We have dedicated support staff available to help you register and use Supplier Portal, along with instructional documents and videos.

- [Supplier Portal](#)
- [View help guides on our website](#)
- [Supplier Portal registration video](#)
- Support staff hours: Monday – Friday 8:00 a.m. – 4:30 p.m.

Phone (612) 543-5412 • Email supplierportal@hennepin.us

New contract structure

Signed work order contracts are required for each project, containing:

- An attachment with the final negotiated scope of services
- Start and end dates for contract service of the work order
- Dollar amount limit specific to the project (NTE “not to exceed” amount)
- A unique work order reference number (contract number PR0000####)
- A unique principal agreement reference number for the organization (PL00000###)

Both the County and vendor sign and must follow the terms in the principal agreement and work order contract

If there are changes to the project during the term of the work order contract, a signed amendment will be required

Work order example

Work Order No: PR00006407

Agreement No: PL00000658

HENNEPIN COUNTY PROFESSIONAL TECHNICAL SERVICES ROSTER WORK ORDER

This Work Order, entered into pursuant to the provisions of the Hennepin County Professional Technical Services Roster Principal Agreement (the "Agreement"), is between the COUNTY OF HENNEPIN, STATE OF MINNESOTA, A-2300 Government Center, Minneapolis, Minnesota 55487, on behalf of the Hennepin County Environment and Energy Department, A-2300 Government Center, Minneapolis, Minnesota 55487 ("COUNTY") and Organization Name, 1234 Main Street, Anytown, Minnesota 55555 ("CONTRACTOR"). The provisions herein are incorporated into and made part of the Agreement and are, thereby, subject to the provisions in the Agreement.

1. CONTRACTOR shall perform the following services: environmental consulting services. These services are more fully described in the Scope of Services, attached as Attachment A and incorporated by this reference.
2. CONTRACTOR shall perform the services between October 01, 2024, and September 30, 2025. Services shall not extend beyond the term stated in the Agreement.
3. CONTRACTOR shall be paid according to the provisions in the Fee Schedule, attached as Attachment B and incorporated by this reference. The total cost of this Work Order shall not exceed Fifty Thousand Dollars (\$50,000.00).

Cyber insurance requirements

Same	General insurance requirements have not changed
New	<p>Cyber may be required for projects that require vendor to access, receive, or store non-public data</p> <ul style="list-style-type: none">• Scope of services will indicate if cyber insurance is required prior to receiving a proposal• If required, the minimum policy limit is \$2 million and must be in place for duration of work order• Work order will not be routed for signature until County receives certificate of insurance

Signing the contract

Adobe Sign is used to obtain your electronic signature

- Email from: adobesign@adobesign.com
- Subject: Signature requested on "CONTRACT PR0000#### - PTSR WORK ORDER CONTRACT TITLE"



The screenshot shows an email notification from Hennepin County. At the top left is the Hennepin County logo, a blue 'H' with 'Hennepin' written inside. To its right, it says 'Powered by Adobe Acrobat Sign'. The main body of the email states: 'Hennepin County Purchasing requests your signature on **CONTRACT PR0000#### - PTSR WORK ORDER CONTRACT TITLE**'. Below this, it says 'Due by April 8, 2025'. At the bottom, there is a large blue button that says 'Review and sign'. The Hennepin County logo is also present in the bottom right corner of the email content area.



What is not changing?

What is not changing?

- [Program application](#) process
- Preference given to small and emerging business enterprises (E/SBE)
- Invoice and payment processes – work does not start before receiving purchase order (PO) or notice to proceed from County project manager
- County project managers will manage work order contract and project

Payment process: best practices

Invoices should include:

- a unique invoice number,
- reference the work order contract number (PR0000####),
- reference the purchase order (PO) number, and
- include a description of the services provided, as referenced in the scope of services

[Redacted]		Date 10/01/2024	Invoice # 444735	
[Redacted]		Work Order (WO) # PR00004444	PO # 517743	
		Invoice Period 10/31/2024 – 11/1/2025	Due Date 11/31/2024	
Bill To Hennepin County Accounts Payable PO Box 1388 Minneapolis, MN 55440-1388 Obf.internet@hennepin.us		Terms Net 35		
Item	Description	Hours	Rate	Amount Billed
	Hennepin County CSAH 150 Lowry Ave Environmental Services For Environmental Services including preparation of the draft phase 1 Env Site Assessment, and project management			
Accounting	Billing/Accounting	3.5	90.00	315.00
Phase 1 Assess	Codes	12	150.00	1,800.00
Subcontractor Inv		32	120.00	3,840.00
HIG Report		6	60.00	360.00
GIS/Bluebeam Supp		4.5	90.00	405.00
Oversight		1	410.00	410.00
Project Support		1	510.00	510.00
[Redacted]		Invoice Total:	\$7,640.00	

Payment process: best practices

- Visit [Getting paid](#) on the County's website to learn more
- Hennepin County is exempt from state and local sales tax
- Email invoices to obf.internet@hennepin.us, cc'ing your project manager
- Submit [electronic substitute W-9 form](#) to elect for payment by direct deposit

When is this happening?

October 31, 2024



Review and wrap-up

Key takeaways

- Changes occurring October 31, 2024
- Cyber insurance required for certain projects
- Purchasing dept staff handling administrative tasks
- Two-party signed work order contract for all new projects
- RFP proposals submitted in Supplier Portal – **Register for Supplier Portal now!**

Key resources

Professional Technical Services Roster (PTSR)

- [Updated program page](#)
- Program Manager: Bria Boos, ptsroster@hennepin.us

Supplier Portal

- [View help guides on our website](#)
- Support staff hours: Monday – Friday, 8:00 a.m. – 4:30 p.m.

Phone (612) 543-5412 · Email supplierportal@hennepin.us

Questions?

