

**CITY OF AUSTIN
PURCHASING OFFICE
RESPONSE PREPARATION INSTRUCTIONS AND EVALUATION FACTORS
SOLICITATION NO. RFP 4400 BY3004**

1. PROPOSAL FORMAT

Submit one original paper copy and one (1) electronic version (USB flash drive) of the Proposal. The original Proposal shall contain original ink signatures. Proposals shall be typed on standard paper and have consecutively numbered pages. Proposals and flash drive shall be organized in the following format and information sequence. Use tabs to divide each part of your Proposal and include a Table of Contents. Proposers should provide all details in the Proposal as required in the Section 0500 - Scope of Work and any additional information you deem necessary to evaluate your Proposal. Failure to do so may result in your Proposal being Non-Responsive.

Section 1

Tab 1 – City of Austin Purchasing Office Documents – Complete and submit the following documents:

- A. Signed Offer Sheet - Complete, sign and return
- B. Section 0605: Local Business Presence Identification. Completed and return. If you will be utilizing Subcontractors, include the Subcontractor's information on this form.
- C. Section 0630 Exceptions – Complete and return
- D. Section 0800 Non-Discrimination and Non-Retaliation Certification – Complete, sign and return
- E. Section 0835 - Non-Resident Bidder Provisions – Complete and return
- F. Section 0840, SDVBE Contractor Certification - Complete and return
- G. Section 0900 Subcontracting/Sub-consulting Utilization Form - Complete, sign and return
- H. Section 0905 Subcontracting/Sub-consulting Utilization Plan, if applicable
- I. If issued, all signed Addendums (all pages)

Tab 2 – Authorized Negotiator: Provide name and pronouns, mailing address, email address, and telephone number of the officer or other representative in your organization authorized to negotiate and execute binding contract terms.

Tab 3 - Executive Summary (5-page limit): The Executive Summary shall contain an overview of the company, qualifications and work experience. The Executive Summary should demonstrate an in depth understanding of complex demographic data collection of Disability populations along with utilizing mixed-methods research both quantitative and qualitative. Additionally, the summary should share the vendors understanding of the histories of the Disabled community in Austin with particular regard to the underrepresented communities. The Executive Summary should be in the form of a standard business letter on official business letterhead and signed by an authorized representative. Include the complete name, address of the firm, telephone number, and email address of the person the City of Austin should contact regarding this Scope of Work.

Tab 4- Business Organization:

- A. State full name and address of your organization and identify parent company if you are a subsidiary.
- B. Indicate whether you operate as a partnership, corporation, or individual. Include the State in which incorporated or licensed to operate. Non-profits should include a statement that they have been granted non-profit status by the IRS.
- C. Provide a general explanation and organizational chart for your agency which specifies the structure and reporting responsibilities of personnel. If the use of subcontractors is proposed,

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identify their placement in the structure and provide a description for each subcontractor's responsibilities. If applicable, specify the branch office or Subcontractor's office which will perform, or assist in performing, work herein.

D. Provide the roles and resumes and/or professional experience for the vendor and key individuals who will be involved in the Scope of Work and deliverables and the percentage of time each person will devote to this work.

Tab 5 – References: Provide a list of three (3) current or previous references within the past five (5) years. References should include work provided to governmental agencies or private entities similar to the Scope of Work (reference Section 0500). All reference information shall be documented and verifiable. References must be aware that they are being listed and agreeable to City interview for follow-up, if deemed necessary by the City. Each reference listed shall include the following:

- A. Agency Name
- B. Agency contract manager name, pronouns, and title, phone number, and email address
- C. Year contract was awarded and length of contract
- D. Dollar value per year
- E. Narrative on type of service provided

Tab 6 – Experience: Provide a narrative of your firm to include the following:

- A. The size of organization
- B. Number of years the vendor has been in business. Note: Vendors will not be considered with less than three (3) recent years of experience. Reference Section 0500 Scope of Work, Item 5.0.
- C. Demonstrate your experience in co-creative and participatory research methodologies within similar and comparable sized cities;
- D. Demonstrate your experience and knowledge in providing a community power analysis.
- E. Provide two (2) samples of work similar to the planned study/project. Vendors may submit sample in an electronic format (flash drive).
- F. Demonstrate your in-depth knowledge and expertise in best practices for demographic data collection of Disabled populations, and
- G. Demonstrate experience in strategically engaging stakeholders through a variety of methods and targeted audiences, specifically experience with outreach to the Disabled community.

Tab 7 – Deliverables, Work Program and Schedule: Provide a narrative of your specific expertise, experience, and compliance regarding the Deliverables in Items 6.0 - Section 0500 Scope of Work. Narrative shall include the proposed implementation plan, with a schedule that demonstrates the steps the Vendor will take to have the program fully operational within contract term. Describe your technical plan for accomplishing required work. Include such time-related displays, graphs, and charts as necessary to show tasks, sub-tasks, milestones, and decision points related to the Scope of Work and your plan for accomplishment. Per Section 0500 Scope of Work, Section 4.0., Contractors Responsibilities, detail the steps you will take in proceeding from Task 1 to the final tasks.

Tab 8 - Local Business Presence: The City seeks opportunities for businesses in the Austin Corporate City Limits to participate on City contracts. A firm (Offeror or Subcontractor) is considered to have a Local Business Presence if the firm is headquartered in the Austin Corporate City Limits, or has a branch office located in the Austin Corporate City Limits in operation for the last five (5) years, currently employs residents of the City of Austin, Texas, and will use employees that reside in the City of Austin, Texas, to support this contract. The City defines headquarters as the administrative center where most of the important functions and full responsibility for managing and coordinating the business activities of the firm are located. The City defines branch office as a smaller, remotely located office that is separate from a firm's headquarters that offers the services requested and required under this solicitation. Points will be awarded through a combination of the Offeror's Local Business Presence and/or the Local Business Presence of their subcontractors. Evaluation of the Team's Percentage of Local Business Presence will be based on the dollar amount of work as reflected in the Offeror's MBE/WBE

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Compliance Plan or MBE/WBE Utilization Plan. Specify if and by which definition the Offeror or Subcontractor(s) have a local business presence.

Tab 9 - Service-Disabled Veteran Business Enterprise (“SDVBE”): Pursuant to the interim Service-Disabled Veteran Business Enterprise (SDVBE) Program, Offerors submitting proposals in response to a Request for Proposals shall receive a three point (3 percent) preference if the Offeror, at the same time the proposal is submitted, is certified by the State of Texas, Comptroller of Public Accounts as a Historically Underutilized Business and is a Service-Disabled Veteran Business Enterprise. This preference does not apply to subcontractors. To receive this preference, Offerors shall complete the enclosed Section 0840 Service-Disabled Veterans Business Enterprise Preference Form, in accordance with the Additional Solicitation Instructions included therein.

Section II

Tab 10 - Price Proposal: Information described in the following subsections is required from each Proposer. Your method of costing may or may not be used but should be described. A firm fixed price or not-to-exceed Contract is contemplated, with progress payments as mutually determined to be appropriate.

- i. Personnel. Itemize to show the following for each category of personnel with separate hourly rates:
 - (1) manager, senior consultant, analyst, subcontractor, etc.
 - (2) estimated hours for each category of personnel
 - (3) rate applied for each category of personnel
 - (4) total cost
- ii. Itemize cost of supplies and materials
- iii. Other itemized direct costs
- iv. If applicable, general and administrative burden. Indicate base used, percentage, and total cost relative to this procurement.
- v. Travel expenses. All travel lodging expenses in connection with the Contract for which reimbursement may be claimed by the Contractor under the terms of the Solicitation will be reviewed against the City’s Travel Policy as published and maintained by the City’s Controller’s Office and the Current United States General Services Administration Domestic Per Diem Rates (the “Rates”) as published and maintained on the Internet at:

http://www.gsa.gov/Portal/gsa/ep/contentView.do?contentId=17943&contentType=GSA_BASIC

No amounts in excess of the Travel Policy or Rates shall be paid. All invoices must be accompanied by copies of detailed receipts (e.g. hotel bills, airline tickets). No reimbursement will be made for expenses not actually incurred. Airline fares in excess of coach or economy will not be reimbursed. Mileage charges may not exceed the amount permitted as a deduction in any year under the Internal Revenue Code or Regulations.
- vi. Printing. State separately the cost of furnishing copies of the final report (if applicable).
- vii. Total cost schedule

The project budget is \$200,000 and no additional funding is anticipated. Proposals exceeding the project budget will not be considered or reviewed. The anticipated contract term is fifteen (15) months.

Section III

2. Proposal Acceptance Period: All proposals are valid for a period of one hundred and eighty (180) calendar days subsequent to the RFP closing date unless a longer acceptance period is offered in the proposal.

3. Proprietary or Confidential Information: All material submitted to the City becomes public property and is subject to Texas Open Records Act upon receipt. If a respondent does not desire proprietary or confidential

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information in the submission to be disclosed, each page must be identified and marked proprietary or confidential at time of submittal. The City will, to the extent allowed by law, endeavor to protect such information from disclosure. The final decision as to what information must be disclosed, however, lies with the Texas Attorney General. Failure to identify proprietary or confidential information will result in all unmarked sections being deemed non-proprietary or non-confidential and available upon public request.

4. Proposal Preparation Costs: All costs directly or indirectly related to preparation of a response to the RFP or any oral presentation required to supplement and/or clarify a Proposal which may be required by the City shall be the sole responsibility of the Offeror.

5. Compliance: The Offeror agrees to compliance with terms of this Request for Proposal (RFP) and with all applicable rules and regulations of Federal, State, and Local governing entities.

6. Exceptions: Be advised that exceptions to any portion of the Solicitation may jeopardize acceptance of the Proposal.

Section IV

7. Evaluation Factors and Award:

A. Competitive Selection: This procurement will comply with applicable City Policy. The successful Proposer will be selected by the City on a rational basis. Evaluation factors outlined in Paragraph B below shall be applied to all eligible, responsive Proposers in comparing proposals and selecting the Best Offeror. Award of a Contract may be made without discussion with Proposers after proposals are received. Proposals should, therefore, be submitted on the most favorable terms.

B. Evaluation Factors:

Maximum 100 points.

1. Executive Summary and Business Organization – reference Section I, Tab 3 and Tab 4 **(20 points)**
2. Experience—reference Section I, Tab 6 **(25 points)**
3. Deliverables, Work Program and Schedule – reference Section I, Tab 7 **(22 points)**
4. Price Proposal – Reference Section II, Tab 10 **(20 points)**
5. Service-Disabled Veteran Business Enterprise Preference – **(3 Points)**
6. Local Business Presence – **(10 Points maximum)**

Team's Local Business Presence	Points Awarded
Local business presence of 90% to 100%	10
Local business presence of 75% to 89%	8
Local business presence of 50% to 74%	6
Local business presence of 25% to 49%	4
Local presence of between 1 and 24%	2
No local presence	0

8. Interviews. Presentations, Demonstrations Optional. The City will score proposals on the basis of the criteria listed above. The City may select a "short list" of Proposers based on those scores. "Short-listed" Proposers may be invited for presentations, or demonstrations with the City. The City reserves the right to re-score "short-listed" proposals as a result, and to make award recommendations on that basis.