



North Central Texas Council of Governments (NCTCOG)

PROJECT NAME: Public Sector Procurement Consulting Services

SUBMISSION DATE: December 2, 2021 (2pm)

SIMPLAR SOURCING SOLUTIONS
Jeff Sawyer | 928-713-0501 | jeff@simplar.com

TABLE OF CONTENTS

TAB A – Cover Sheet	Page 2
TAB B – Executive Summary	Page 7
TAB C – Key Personnel	Page 11
TAB D – Technical Proposal	Page 20
TAB E – References	Page 37
TAB F – Cost Proposal.....	Page 44
TAB G – Attachments	Page 46



TAB A

COVER
SHEET



REQUEST FOR PROPOSALS
For
Public Sector Procurement Consulting Services
RFP # 2021-083

Sealed proposals will be accepted until 2:00 PM CT, Tuesday, November 23, 2021, and then publicly opened and read aloud thereafter.

Simplar Sourcing Solutions LLC

Legal Name of Proposing Firm

John Savicky

Contact Person

Managing Member

Title

602-326-2330

Telephone Number

John.Savicky@simplar.com

E-Mail Address

2307 S Rural Rd

Address of Principal Place of Business

Tempe, AZ

City/State

85282

Zip

PO Box 27565

Complete Mailing Address

Tempe, AZ


City/State

85285

Zip

Acknowledgment of Addenda: #1 X #2 X #3 X #4 #5

By signing below, you hereby certify that the information contained in this proposal and any attachments is true and correct, and may be viewed as an accurate representation of proposed services to be provided by this organization. You agree that failure to submit all requested information may result in rejection of your company's proposal as non-responsive. You certify that no employee, board member, or agent of the North Central Texas Council of Governments has assisted in the preparation of this proposal. You acknowledge that you have read and understand the requirements and provisions of this solicitation and that the organization will comply with the regulations and other applicable local, state, and federal regulations and directives in the implementation of this contract. And furthermore that I certify that I am legally authorized to sign this offer and to submit it to the North Central Texas Council of Governments, on behalf of said offeror by authority of its governing body.



Authorized Signature

RFP 2021-083 Public Procurement Consulting Service

Simplar Sourcing Solutions LLC., is pleased to be afforded an opportunity to partner with NCTCOG to provide procurement services under the SHARE program. The pandemic that began in 2020 spotlighted the critical role procurement plays in the effective functioning of an any service enterprise. Leaders realized they could no longer ignore the nagging issues that resulted in the inefficient procurement of goods and services needed to support the organization.

Some, who were confronted with highly visible and catastrophic disruptions to the supply chain, rushed to find quick remedies, but the scale and complexity, especially in public sector procurement, presents unique challenges to implementing change. The Simplar team is excited about the opportunity to share our passion and expertise and assist NCTCOG and the SHARE Members with procurement support. Thank you in advance for your time and consideration of our proposal.

Jeff Sawyer
President

Instructions: Provide a brief statement of the respondent's understanding of the work to be done and a summary of its qualifications.

Primary Intent:

The North Central Texas Council of Governments (NCTCOG) seeks to contract one or more experienced firms and/or individuals with the background, experience, skills, and capability to produce high-quality public sector procurements on an as-needed basis. The primary intent is to receive proposals resulting in retaining the services of a vendor to provide Public Procurement Consulting Services as part of the SHARE Cooperative Purchasing Program. Under the SHARE program, any public entity or non-profit can use the SHARE contract and its selected vendor(s) and pricing to pursue their own projects.

Potential Activities & Tasks to Be Performed:

We understand and confirm our acknowledgement that the awarded firm may be requested to perform comprehensive procurement activities, such as:

- Procurement Planning
- Coordinate and Facilitate Stakeholder Meetings
- Procurement Development
- Solicitation Development (RFP, RFQ, ITB, RFSQ, etc.)
- Specification/Scope of Work Development
- Market Research
- Cost & Price Analysis
- Solicitation Document Development
- Evaluation Criteria Development
- Coordinate Evaluation Process
- Establish Interview & Oral Presentation Procedures
- Coordinate BAFO Procedures
- Coordinate Selection Process
- Review Internal Controls
- Procurement Policy Development



Qualifications:

Tabs C and D provide extensive details regarding our team's experience, expertise, and qualifications related to the services requested by NCTCOG. **The scope of services outlined by NCTCOG is *EXACTLY WHAT WE DO EVERY DAY*.** Some of our unique qualification include:

- Simplar Sourcing Solutions LLC., specializes in procurement consulting, procurement advising, procurement transformation, procurement assessments, and fairness and oversight services. **Our team has provided procurement services and support on over 3,000 projects (\$11B), for governments and other organizations throughout North America.**
- All of our team members have advanced **procurement credentials** and have led procurements of all complexities (small/simple procurements to high risk/complex projects).
- Simplar has helped client organizations enhance and optimize their procurement departments, and have won several **awards for Procurement Innovation**.
- Our team (that is assigned to this contract) have performed **thousands of educational presentations** and seminars on procurement fundamentals, procedures, and best-in-class procurement practices.
- Our team has helped client organizations improve overall satisfaction of the delivered goods/services, achieving an customer satisfaction rating of **97%**.
- Our team has helped client organizations reduce project delays by **50%** and reduce evaluation time (on RFP's procurements) by **50%-90% (saving several months of time)**.
- Our team has helped client organizations reduce internal project management and oversight effort by **70%**.
- Our team has helped different types of public organizations, such as: **Federal, Military, States, Cities & Municipalities, Universities, School Districts, Counties, Hospitals, etc.**
- All of our team members have **PhD's or Master's Degrees**, and have extensive backgrounds in procurement, including multiple credentials.



TAB B

EXECUTIVE SUMMARY

Instructions: An executive summary will briefly describe the individual or firm's approach and clearly indicate any options or alternatives being proposed. It should also indicate any major requirements that cannot be met by the individual or firm.



Approach

We are experts in performing all the types of procurements and tasks outlined in your RFP. Simplar's fundamental approach is customer-centric, performance-driven, focused on quickly responding to the specific needs of your members, and placing integrity, ethics, and diversity at the core of every task we perform. We also understand the needs of your SHARE members will vary from project to project. One member may only request assistance with developing their scope of work, while another member may request complete procurement assistance preparing their RFP/RFSQ/etc. As a result, our complete and comprehensive approach will be tailored based on the individual needs of each member.

Our vast experience in working with variety of governmental and private agencies have taught us that each is unique with specific needs, preferences, and perspectives. Consequently, we begin each and every procurement task with an initial "alignment" meeting. At this meeting, we work with your members to identify the individual needs, timeline, constraints, and opportunities for each effort. Some procurements, such as complex software/IT systems will require alignment meetings across many stakeholders, not just procurement and the client. Other procurement task are simple and alignment is quickly achieved. Regardless of initial scale, to gain a better understanding of the right approach to follow when first engaging on a new task with a NCTCOG member, some questions that we would ask as part of the initial "alignment" meeting include:

- What are the goals, objectives, or purpose of their request?
- What are their critical constraints regarding the schedule/timeline and budget? Understanding these constraints can allow us to propose the best approach, timeline, and strategy.
- What is the status of approvals? It is important to understand if the member has necessary executive buy-in, or if this is more of a fact-finding mission.
- Do they have a core-team established? Generally, a project manager will be essential on every project that is procured, and in some cases, the core team may also include a procurement lead and a technical subject matter expert.
- What is their level of comfort and maturity with this type of project? This allows us to provide suggestions for approaches. For example:
 - Complexity – Is the good/service very complex? For example, are we

looking to replace lighting in a building or upgrade their HR and Financial payroll?

- Uniqueness – Has the Client/Member purchased this good/service many times in the past, or once in the last 5-10 years?
- Success Rate – If the Client/Member has purchased this good/service in the past, what has been the success rate? Has the procurement protested in the past? What is the success rate in the industry for this service? Etc.

These are just some of the questions that our team members will ask when we are engaged by your Clients/Members. Once the needs are known and the expectations are aligned, we will develop a "Project Plan" for each task that outlines the objectives, timeline, task assignments, deliverables description and schedule, risk plan, and communication plan. We then deliver each task, whether big or small, with complete transparency, total integrity, and at the highest level of performance.

Ability to Meet the Requirements

Simplar Sourcing Solutions specializes in all of the services, tasks, and activities that are outlined in NCTCOG's RFP and meet all of the requirements. We are excited and look forward to the opportunity to assist your members.

Options & Alternatives

In addition to the services, tasks, and activities outlined in the RFP, Simplar can also perform the following additional services:

- Procurement Bootcamp & Workshops:** Whether an individual is looking for a little procurement refresher, learn about industry best practices, or for a complete procurement training course, Simplar can assist. Our team has developed 'Bootcamps' and professional development courses related to procurement for individuals of all experience levels. In fact, we are currently assisting the State of Idaho in developing a Procurement Certification program for all State procurement professionals.



- b) **Best-Value-Procurements:** Our team members are pioneers in procurement innovation and have developed an accelerated RFP process that can reduce evaluation time by 50%-90%, reduce internal project management by 70%, and improve overall satisfaction to 97%. Additional information about this process is described in Tab D.
- c) **Fairness Advising & Oversight:** Large and complex procurements can expose the client organization to protest risks (claims of not being open, fair, or transparent). Simplar has the solution. Many organizations have hired us to act as third-party independent advisors. We act as observers to assure the Organization, the Suppliers, and the Public that the procurement was done fairly. Additional information about this process and about a 'Fairness Report' is described in Tab D.
- d) **Solicitation Report Card:** Our in-depth knowledge of procurement has resulted in a Solicitation checklist or 'Report Card' that can be utilized to mitigate protest risk. Our checklist reviews over 30 items, based on 7 different procurement dimensions. This can provide clients/agencies with a quick tool to assess the overall 'grade' of their solicitation. Additional information about this process and about a 'Fairness Report' is described in Tab D.
- e) **Project Advisor:** As a neutral third-party, we also provide advising support for projects and their teams. Sometimes it can be hard for a contractor/supplier and client to find how to work well together, overcome risks, manage personality or communication challenges, and build trust and accountability. Using our "Risk-based Partnering and Planning" methodology, we provide partnering and project advisor support to act in the overall "projects" best interest. We have found this expertise and contribution is especially impactful on large, complex, and risky procurements and project deliveries.
- f) **Procurement Organization Assessments:** A pragmatic organization assessment of a procurement group is the first step in the journey to develop a world-class procurement

organization. Benefits of an assessment of a procurement organization include:

- Enhanced comprehension of all aspects of procurement by process stakeholders
- Fewer deviations from programmatic, ethical, and regulatory requirements
- Streamlined procurement process based on "best practice" and benchmarking
- Improved value for dollars expended in the purchase of enterprise goods and services

Our team reviews solicitations and contracts, determine the viability of the current organization to address goals and objectives required to achieve effective procurement, examine and determine the adequacy of current policies, processes, and procedures to guide and direct operational managers and staff, meet with managers to clarify observations, address gaps in information, and ask questions to better understand the context and rationale for the development of the processes currently utilized.

- g) **In-Person & Virtual Support:** Prior to the pandemic, the majority of clients expected that we perform specific procurement activities on-site (such as training and education, pre-proposal meetings, interview, presentation, demonstrations, etc.). However, in 2020 we were forced to adapt and perform all procurement activities 100% virtually. We have actually found this shift (to performing all activities virtually) to be highly successful. It allows us (and the Client) to be more flexible with scheduling, lowers total cost, and reduces environmental impacts due to travel. We are able to provide SHARE Members with either option (100% virtual option, or perform activities in-person) depending on their needs and preferences.
- h) **SHARE Member Outreach:** Our proposed team members have provided thousands of procurement presentations over the past 20-years. We frequently give presentations to agencies, groups, organizations, etc., regarding our procurement services. If we are fortunate to win this contract, we would work with NCTCOG to actively communicate, market, and bring awareness our services to your members.



TAB C

KEY
PERSONNEL

Key Personnel Qualifications

The following individuals will be involved in the delivery of goods or services under this RFP

Name	Degree	Years of Public Procurement Experience	Procurement Credentials & Certification	Wide Array of Procurement Experience*
Kenn Sullivan	Ph.D. & MBA	20+ Years	✓	✓
Gwen Williams	MS	30+ Years	✓	✓
John Savicky	MS	20+ Years	✓	✓
Brian Lines	Ph.D.	13+ Years	✓	✓
Kristen Hurtado	Ph.D. & MEd	12+ Years	✓	✓

**as detailed below*

Procurement Experience

Our team has worked on thousands of public procurements, which include a wide array of goods and services. This includes purchases on small/simple projects, to very complex projects (valued at over a billion dollars). We have experience and expertise in RFPs, ITBs, RFSQs, RFCSPs, RFQs, RFIs, and more. The following list highlights some of the types of procurements we have performed:

- ❑ Software & IT Services (ERP, CRM, asset management, telecom, mobility, HR, Finance, etc.)
- ❑ Construction Services (Design-Bid-Build, CM@Risk, Design-Build, Progressive DB, JOC/IDIQ, etc.)
- ❑ Design/Engineering Services
- ❑ Consulting Services
- ❑ Facility Management Services
- ❑ Waste Management & Recycling Services
- ❑ Janitorial Services
- ❑ Landscaping Services
- ❑ Dining & Food Services
- ❑ Auxiliary Services
- ❑ Moving Services
- ❑ Healthcare Services
- ❑ Insurance Services
- ❑ Accounting, Financial & Pension Services
- ❑ Document Management & Copy Machine Services
- ❑ + many more

Simplar Team Qualifications

Each member of our team meets all of the requirements outlined in the RFP. The following table summarizes the minimum qualifications that were identified in Section 5.1:

Requirement	Kenn	Gwen	John	Brian	Kristen
	✓	✓	✓	✓	✓
Extensive experience working in the Public Sector relating to acquisitions, procurement, purchasing, inventory management and/or supply chain logistics.	✓	✓	✓	✓	✓
Experience managing large and complex project tasks which may include acquisition planning, RFP/ITB preparation, market research, cost and price analysis, evaluation of performance, contract termination, and contract closeout.	✓	✓	✓	✓	✓
Extensive knowledge of procurement planning and analysis, sourcing and solicitation, and contract development and management.	✓	✓	✓	✓	✓
Technical expertise in public sector procurement practices.	✓	✓	✓	✓	✓
Demonstrated ability to work successfully with government.	✓	✓	✓	✓	✓
Have no previous record of default on a government contract.	✓	✓	✓	✓	✓
Have no formal debarment or suspension from entering into contracts with a governmental agency or other notification of ineligibility or prohibition against bidding or proposing on government contracts.	✓	✓	✓	✓	✓
Proficiency in MS Office (Word, Excel, PowerPoint and Outlook).	✓	✓	✓	✓	✓
Effective oral and written communication skills.	✓	✓	✓	✓	✓
Bachelor's Degree or higher from an accredited college or university in a related field or five (5) years in the field in lieu of formal degree/certificate, etc.	✓	✓	✓	✓	✓
Ability to research and define multiple project scopes, schedules, and targets.	✓	✓	✓	✓	✓
Ability to provide expert advice and guidance to senior level staff members.	✓	✓	✓	✓	✓
Have Public Sector Procurement Experience with local, state, federal agencies.	✓	✓	✓	✓	✓
Have experience in planning/performing Public Sector Procurements.	✓	✓	✓	✓	✓

Interface

Instructions: Provide a general explanation of how the team will interface with NCTCOG and Participating Entities' project management and team personnel.

Every project/procurement is unique from the perspective of the client/agency. Some clients/agencies will request a very "hands-on" approach, while others may request less involvement from our team. Simplar is completely flexible in our approach. We can provide as much (or as little) support as requested.

From the Q&A, we understand that NCTCOG/SHARE does not anticipate involvement in a SHARE Member's project. However, we can keep NCTCOG informed on high-level project status such as: Number of active projects/procurements, types of procurements, procurement timelines, volumes, etc. The level of information to be shared can be identified on a project-to-project level (based on input from NCTCOG and the SHARE Member). We will comply with all SHARE communication and reporting requirements.

For a SHARE Member that is actively utilizing our services on a procurement, we would once again share as much or as little information as they would like. Typically, we would host weekly conference call meetings with the client's core team (primarily their Project Manager) to review the project status, procurement schedule, critical action items, and any potential upcoming risks. For small/simple procurements, the client/member may request to skip these calls, but for larger and more complex procurements, these calls are helpful to keep the procurement on schedule.



Key Personnel Background

Name: **John Savicky**

Role: **Primary Procurement Specialist**

Degree: **Master's Degree**

Procurement Credentials: **CPE & BVP Credentials**

Years of Public Procurement Experience: **20+ years**

Phone Number: **602-326-2330**

Email: **John.Savicky@simplar.com**

Dallas Independent School District

City of Los Angeles

City of Peoria

City of Roseville

State of Idaho

State of Oregon

State of Alaska

University of Minnesota

Harvard University

Olmsted County

Google

United Airlines

GE

US Army

US Coast Guard

US GSA

FAA

+ More

Background & Experience:

John Savicky will serve as the Primary Procurement Specialist for this contract, and will also be the primary point of contact for this contract. John has spent the last 23 years specializing in the field of Procurement and has executed **over 1,500 projects** (\$5 Billion). He has worked with private, public, federal, and international organizations (sample organizations shown to the right).

John has advanced **CPE and BVP procurement credentials**. He is a certified procurement instructor for the Center of Procurement Excellence, where he teaches a certification course focused on procurement and procurement-related principles. John also has taught graduate level classes on procurement at Arizona State University. John has experience with all aspects of procurement (including: market research, scope development, solicitation preparation, evaluator training, preproposal presentations, supplier training, evaluation and procurement oversight, debriefing, post award metrics, etc.).

John is experienced with the **FAR, Model Procurement Code**, international procurement policies, and other State procurement-related policies (including **Texas procurement policies**). As both a practicing professional and trainer, John has published over 30 articles related to procurement, conducted procurement workshops and training at over 100 different conferences/seminars, and has taught graduate courses on advanced procurement systems.

John has provided roles as Procurement Specialist and a Procurement Fairness Advisor, which has afforded him with a unique opportunity to ensure that procurement strategies and advanced models uphold the integrity as intended and instill trust in the public. John received both his undergraduate and graduate degrees in Engineering and is currently completing his PhD, with a focus of establishing a framework for a standard for RFPs/RFxs in the built environment to promote fairness.

John recently assisted the University of Ottawa on one of their largest and most complex procurements; a \$35 Million Enterprise Resource Planning (ERP) software upgrade and modernization program. John provided procurement oversight and fairness advising with regards to the development of the RFP, and with the evaluation and execution of the procurement process. With John's direction and leadership, the University of Ottawa was able to complete the procurement 50% faster (compared to their traditional model).

Key Personnel Background

Name: **Dr Brian Lines**

Role: **Procurement Specialist & Advising**

Degree: **PhD**

Procurement Credentials: **CPE and BVP Credentials**

Years of Public Procurement Experience: **13+ years**

Phone Number: **928-713-0501**

Email: **Brian.Lines@simplar.com**

Background & Experience:

Dr Brian Lines will serve as a Procurement Specialist for this contract. Brian brings 13+ years of experience in the areas of advanced procurement, developing solicitations, developing scopes, project planning, and procurement fairness advising. Brian specializes in supporting complex projects (software and IT, along with the built environment), and has worked with the City of Seattle, University of Alberta, Evergy Utility Services, Dalhousie University, Hallmark Corporation, and many more.

Brian assisted the University of Alberta with transforming their procurement departments approach to RFP's. Over the course of 5-years, Brian assisted the University with the procurement of 15 different highly-sensitive projects, which included several alternative delivery construction projects. The largest and most sensitive project, was the \$30 Million Balmoral project. This was a design-build (DB) project to renovate and repurpose a cold storage facility to a specialized research facility for radiopharmaceuticals that includes a 24MeV cyclotron. Due to the nuclear aspects of this project, the project involved oversight of many non-University participants (the City, Province, Nuclear Agencies, etc.). With the procurement oversight and fairness advising of Brian and the Simplar Team, this project was awarded without any protests or disputes.

Brian also supported the City of Seattle with an IT procurement that included: requirements gathering and market research stage, RFP development, evaluation and selection procedures, pre-project planning, and weekly QA/QC checks for the entirety of the deployment phase. Brian facilitated a debrief between the supplier teams to capture lessons learned intended to optimize the second deployment phase.

Brian has conducted hundreds of trainings on solicitations and procurement approaches. His comprehensive procurement experience, along with his advanced CPE and BVP credentials, make him an outstanding candidate for this effort.



**Seattle
City Light**



**UNIVERSITY OF
ALBERTA**

Key Personnel Background

Name: **Dr Kristen Hurtado**

Role: **Procurement Specialist & Advising**

Degree: **PhD & MEd, MS**

Procurement Credentials: **CPE, BVP, and FMP Credentials**

Years of Public Procurement Experience: **12+ years**

Phone Number: **928-713-0501**

Email: **Kristen.Hurtado@simplar.com**

Background & Experience:

Dr Kristen Hurtado will serve as a Procurement Specialist for this contract. Kristen has over 12+ years of experience in public procurement (including organizations such as the University of California, Arizona Public Services (public utility), Salt River Project (public utility), University of Carleton, Discount Tire, and more). Kristen is currently assisting Georgia-Pacific (the world's largest tissue products producer and the second-largest US forest products manufacturer) with a software transformation, guiding them with current and future state documentation and visioning.

Kristen has assisted Public Organizations with procuring a variety of goods and services, including (but not limited too): Document management and print services, security services, janitorial services, construction services, design services, dining services, and more.

She has experience with performing all critical procurement tasks including:

- ☐ Solicitation development
- ☐ Developing scope of works
- ☐ Conducting market research
- ☐ Process mapping
- ☐ Conducting surveys and assessments
- ☐ Conducting interviews and product demonstrations
- ☐ Procurement planning
- ☐ Evaluator education and training
- ☐ Supplier education and training
- ☐ +more



Kristen has received her master's degree in education (with a focus on adult learning) and her doctorate in construction management. She has an extensive background in teaching professionals on procurement fundamentals, key principles, and solicitation procedures. She has developed a variety of workshops and bootcamps to teach professionals key procurement fundamentals and optimization tactics.

Key Personnel Background

Name: **Dr Kenneth Sullivan**

Role: **Executive Leadership & Strategic Planning**

Degree: **PhD & MBA**

Procurement Credentials: **CPE & BVP Credentials**

Years of Public Procurement Experience: **20+ years**

Phone Number: **928-713-0501**

Email: **Kenneth.Sullivan@simplar.com**

Background & Experience:

Dr. Kenn Sullivan will provide leadership, strategic support, and advising. Kenn has an MBA and PhD, and is currently a Professor at Arizona State University (ASU) where he teaches multiple classes including: RFP Development and Advanced Procurement Procedures. His background is in construction and facilities management, and also teaches courses on topics related to alternative delivery models and sustainability.

Kenn has provided procurement guidance, procurement assessment, and procurement oversight, on **over 1,000 projects**. His processes and tools have been implemented by over 100+ organizations on projects valued at over **\$10 Billion** (including US Airforce, US Army, City of Phoenix, Los Angeles Department of Water and Power, Seattle City Light, Arizona State Parks, Idaho Department of Transportation, Boise State University, State of New Mexico, and many more Public Organizations).

He has led outsourcing and delivery efforts in hundreds of highly-sensitive projects, including software, IT, construction, business services, municipal services, healthcare, and more. Professor Sullivan has authored over 200 peer reviewed publications, has won three best paper awards, and has an advanced CPE and BVP credentials by the Center of Procurement Excellence.

Key Personnel Background

Name: **Gwendolyn Williams**

Role: **Executive Leadership & Strategic Planning**

Degree: **MS**

Procurement Credentials: **CPE & PMP Credentials**

Years of Public Procurement Experience: **30+ years**

Phone Number: **928-713-0501**

Email: **Gwen.Williams@simplar.com**

Background & Experience:

Gwen Williams will provide Executive Leadership for this contract. Gwen has over 30 years of experience with managing and leading procurement departments in major municipal organizations. Recently, Gwen was the Assistant General Manager of Supply Chain Services for the largest water and power municipal utility in the United States – The City of Los Angeles Department of Water and Power (LADWP). She was responsible for the transformation, management, administration and supervision of procurement and supply chain services. She had oversight over procurement, strategic sourcing, supplier performance, management and physical distribution of inventory, purchase card administration, specification management, environmentally preferable purchasing, contracts and negotiations, and small business/supplier relations administration.

Gwen also spent ten years with LA Metro, as a Contracts Administrator, Manager of Contracts, Director of SBE/DBE Programs, Deputy Project Manager, Deputy Executive Officer, and Executive Officer. As the Executive Officer at LA Metro, she was responsible for the day-to-day management of contracts and materials department (with 295 employees and \$750M in annual purchases).

Gwen has the 'complete package' when it comes to overall procurement experience. Having worked in both the private and public sector, with complex & challenging initiatives, she has the skillset required to manage and execute the services requested by NCTCOG.





TAB D

**TECHNICAL
PROPOSAL**

Background

What We Do

Simplar Sourcing Solutions LLC., was established by a group of procurement experts, whose mission is to help organizations transform the way they do procurement. Simplar specializes in procurement consulting, procurement advising, procurement transformation, procurement assessments, and fairness and oversight services. Our team has provided procurement services and support on over 3,000 projects (\$11B), for organizations throughout North America.

What Makes Us Different

- All of our team members have PhD's or Master's Degrees, and have extensive backgrounds in procurement.
- All of our team members have advanced procurement credentials and have led procurements of all complexities (small/simple procurements to high risk/complex projects)
- Unlike most consultants in this arena, all of our team members have worked with Public Organizations and have also worked with vendors/suppliers. This unique experience (of working on 'both' sides of the fence) provides us with invaluable experience (which most other consultants will not have).
- The Simplar team includes industry professionals, researchers, and University faculty.
- Simplar Sourcing Solutions LLC., is the global leader in procurement support, innovation, and transformation. The support we provide is directly related to the services being requested for this proposal. This is what we do!!!

Procurement Innovation & Excellence

Our state-of-the-art procurement approaches have been utilized by public and private organizations globally. Several of our clients have won prestigious industry awards for Procurement Excellence, Leadership, and Procurement Innovation of the Year (including the CPE Gold Award for Procurement Excellence, COAA Top Gold Award, and a CAUBO Award for Procurement Innovation).

Procurement Knowledge

Our proposed team members have taught graduate-level procurement courses, including courses on RFP Fundamentals and Advanced Procurement Practices. Throughout these courses, we have reviewed procurement legislation and policies, and we have taught students core procurement fundamentals, including:

- Openness: The procurement must be as open as possible, to maximize and foster competition
- Fairness: The procurement process must treat all suppliers equally, and there must not be any favoritism. Ethics and Diversity must be respected and enforced.
- Transparency: The procurement process must clearly describe how the award will be made and must prove that the process was followed
- Value: The procurement process should provide the greatest overall value to the public

Procurement Toolkits

Simplar Sourcing Solutions LLC., is a global leader in procurement innovation. Over the past 20 years, our team has developed 'Procurement Toolkits', that utilize best practices including:

- Solicitation templates
- Submittal form templates
- Guidelines on how to run a procurement
- Presentations on how to maintain fairness

We have conducted thousands of workshops and seminars related to procurement for associations such as NIGP, NASBO, NASPO, NAEP, CAPPO, ISM, SCMA, ASCM, CAUBO, CPE, and many other professional associations in procurement/supply chain.

'Best-In-Class' Procurement Procedures

Our team members are leaders in procurement innovation. Our team has developed a best-value XPD (expertise-driven project delivery) process, that has been implemented by hundreds of public organizations (as shown on the next page) and Fortune 500 companies as well (such as Google, GE, United Airlines, etc.) This process can be utilized by any public organization that is permitted to use an RFP solicitation, and has been documented to reduce **evaluation time by 50%-90%**, reduce internal **project management by 70%**, and improve **overall satisfaction to 97%**.

Industry Experience

Instructions: What is your experience in the industry?

Over the past 20-years, our team has assisted over 150 public and private organizations related to procurement support, procurement advising, vendor selection and evaluation, contract negotiations, procurement oversight, and fairness advising. Some of the Public Organizations we have assisted are shown below. The figure to the right, illustrates some of the types of procurements that we have performed.

EDUCATION	<ul style="list-style-type: none"> • Dallas Independent School District • University of California • Kansas City Community College • University of Minnesota • Arizona State University
STATE AGENCIES	<ul style="list-style-type: none"> • State of New Mexico • State of Oregon • State of Idaho • State of Georgia • State of Washington
CITY AGENCIES	<ul style="list-style-type: none"> • City of Los Angeles • City of Peoria • City of Phoenix • City of Roseville • City of Rochester
COUNTIES	<ul style="list-style-type: none"> • Dallas County • Hennepin County • Olmsted County • Leduc County • St Louis County
FEDERAL	<ul style="list-style-type: none"> • US Air Force • US Army • US Coast Guard • FAA • GSA

Some of the procurements we have performed include:

Business Services

- Food & Dining Services
- Document Management
- Pension & Retirement
- Vending Machines
- Audio/Visual
- Recycling
- Online education
- + many more

Facility Services

- Janitorial / Custodial
- Maintenance
- Landscaping
- Fitness Equipment
- Building Systems
- Waste Management
- Energy Management
- + many more

Software & IT Related

- Enterprise Resource Planning (ERP)
- CRM Solution Upgrade
- Identity & Access Management
- Emergency Radio Systems
- Asset Management System
- Wireless Network Upgrades
- + many more

Construction Services

- DBB, DB, CMAR, JOC, IPD, Low Bid
- Design Services
- Construction Services
- New & Renovation
- Infrastructure
- Laboratory
- Education
- Hospital
- Financial
- Specialty
- + many more

Services Provided

Instructions: What services do you provide throughout the process?

Members of this SHARE program will most likely require different levels of service (some may require very little support, while others may require greater in-depth support depending on the need). Simplar provides **complete and comprehensive procurement support**. Our team can perform as much, or as little, as needed by the public agency. Services that we provide include:



1) Pre-Planning Activities & Support

These activities generally assist public agencies with determining if the project/procurement is a 'go' or 'no-go', set up the initial understanding of what need the procurement is fulfilling, the current market, and any specific risk or challenges the task may encounter. This includes services activities that we provide, such as:

- Coordinate and Facilitate Stakeholder Meetings – we provide project administrative support to coordinate meetings with various schedules and stakeholders, can provide the meeting platform, have facilitation expertise, develop agendas, maintain meeting minutes, and manage all communication and follow-up procedures. We also provide support and insight to all critical stakeholders on procurement fundamentals, core principles, and solicitation strategies that help guide and align the project teams. We have a specific Weekly Report that we use to track the effort, key decisions, impacts to initial expectations and plan, and use to help move the timeline forward.
- Market Research – we provide complete market research, including traditional and our advanced RFI processes to identify needs, opportunities, technologies, gaps, and strategies for the best path(s) moving forward, scope of work development, budgeting insights, and organizational planning.
- Needs assessment activities – we provide needs assessment services and current or existing conditions capture, measurement, quantitative and qualitative data collection, and reporting. (We capture, review, and specify the client's needs, measure and document existing system, etc.)
- We also provide knowledge of industry trends and tools to attract vendors in a variety of market sectors.

2) Procurement Approach & Development

There are numerous procurement approaches that can be used to help the agency achieve its acquisition goals. We have expertise in each of the solicitation structures listed below.

- ✓ Request for Information (RFI)
- ✓ Request for Proposals (RFP)
- ✓ Invitation to Bid (ITB) / Invitation for Bid (IFB)
- ✓ Request for Statement of Qualifications (RFSQ)
- ✓ Request for Competitive Sealed Proposal (RFCSP)
- ✓ Request for Quote (RFQ)
- ✓ Request for Qualifications (RFQ)
- ✓ Request for Tender (RFT)
- ✓ Vendor of Records (VOR)



The Simplar team has experience in all types of procurement solicitations. We are certified procurement instructors, so we can help educate and train your members/agencies on selecting the overall best approach. Our team can assist with:

- Identifying options for the 'best' procurement approach for each unique project
- Reviewing all procurement policies
- Planning the critical activities for each unique solicitation
- Developing a procurement schedule (of all critical activities necessary for award)
- Provide advice on strategies to maximize the ability to partner with the best vendor in the fastest amount of time spent in procurement

Two of the most common solicitation structures that we see organizations using are ITB and RFP. As an example, Simplar can assist with these solicitation types in the following ways:

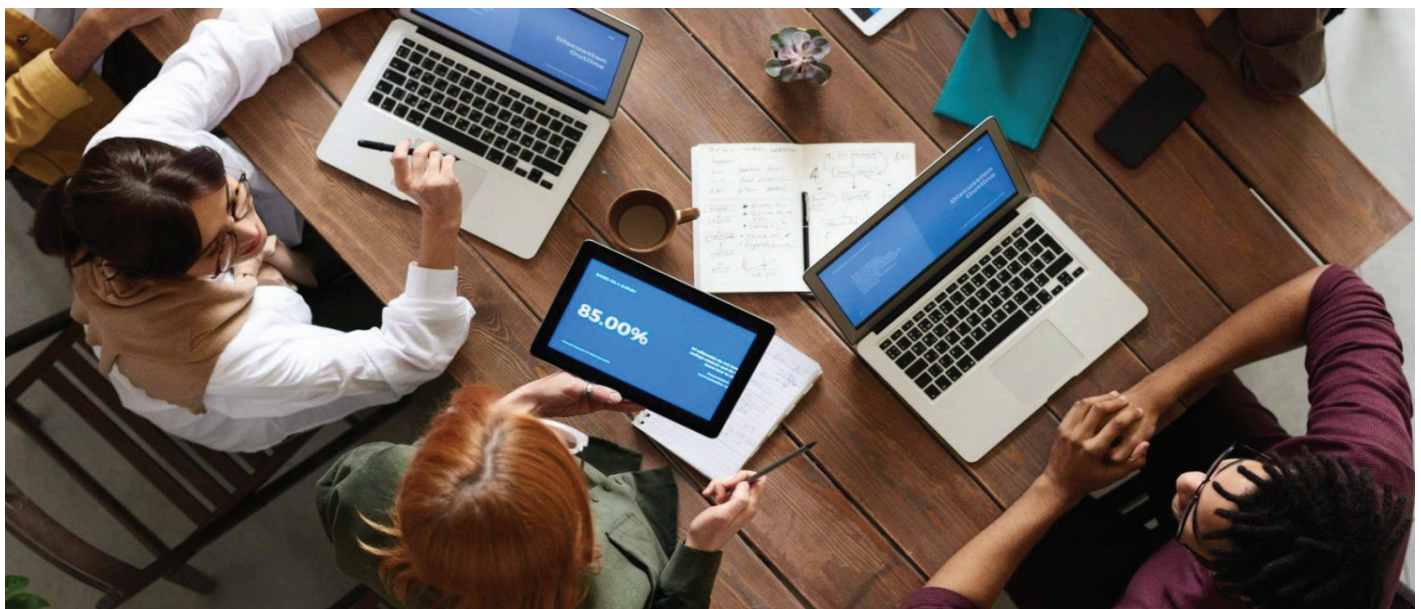
Invitation to Bid (ITB): An ITB primarily awards based on lowest cost. The strengths of an ITB are: it is fast, it is easy, and it minimizes evaluator bias. However, the lowest-priced supplier is not always the best on a very complex or high-risk project. Simplar provides the advising, process expertise, and know-how to help guide clients toward the right decision on whether to employ ITB or another procurement approach (when ITB is not the only legal option). Once the decision to go via ITB is reached (where as the best practice or required by regulation), Simplar has the expertise to assist in SOW development, solicitation development, procurement administration, and final selection and processing.

Request for Proposal (RFP): An RFP can assess multiple factors (besides price) to select the supplier. The strength of an RFP is that it allows the agency to consider experience, past performance, innovation, and other factors that can maximize the probability of success. However, RFP's will generally take more time since proposals must be read and evaluated, and RFP's can increase the potential of protest risk if the process is not performed correctly (risk caused by evaluator bias or favoritism).

Simplar has found that while RFPs typically only account for 15-20% of procurement activities, they represent around 80% of most organization's purchasing spend. This Pareto conundrum means that much of the money spent by an organization through its procurement organization is via a method that their procurement professionals utilize with limited frequency. Simplar's expertise becomes especially valuable in assisting organizations choose and develop the best solicitation structure, evaluation procedures, and competitive strategy. Simplar is a one stop shop from there, with SOW writing tools and expertise, solicitation templates and writing expertise, evaluation and selection best practices, source selection plan development, evaluator training, procurement administration, interview and demonstration management, and final selection modeling and vendor negotiations supports (BAFO, partnering, etc).

3) Solicitation Development Support

Once a decision has been made to move forward, and a solicitation method has been selected, we provide your members with the necessary resources, skill, and experience to prepare the optimal solicitation. The individual activities would vary based on the type of solicitation that is chosen, but as an example, the following will be performed when conducting an RFP.



- Review and inclusion of all State and Agency procurement policies (to ensure that the solicitation follows all internal policies)
- Develop evaluation criteria & weights
- Develop the evaluation process (including procedures, evaluation forms, evaluation guides, etc.)
- Establish an evaluation committee
- Set the procedures regarding the shortlisting process
- Set procedures regarding interviews, oral presentations, and demonstrations Establish procedures regarding best-and-final-offers (BAFO)
- Identify and develop cost & pricing analysis/forms
- Review all internal processes and controls for probity
- Develop the submittal forms
- Develop the Solicitation Document (to be advertised)

4) Scope of Work Development Support

Often overlooked, the Scope of Work (SOW), or specification, is one of the most important pieces of any solicitation. For some agencies, preparing the SOW can be a difficult activity if they don't have the internal resources available, or if they don't have the experience necessary to identify what should, or should not be included.

Simplar has tremendous experience and has developed proprietary best-practice SOW templates and guides (tailored for specific industries), which we utilized to prepare better and more complete SOW/Specification documents for our clients. Our team has the capability and expertise for:

- Compiling the 'current state' of the existing environment
- Compiling a 'future state' vision of the project/agency
- Collecting & compiling critical vendor-requested information
- Compiling functional requirements



Simplar has also pioneered an accelerated RFI process that allows clients to quickly and efficiently identify the information that is critical to a SOW. Traditional RFI processes can take several weeks/months to implement, and in most cases result in marketing packages from the suppliers. Although we have experience in conducting these traditional types of RFI's, and provide that services when required, our accelerated RFI process focuses on a virtual 60-90 minute meeting with suppliers rather than long-written submittals. This process is significantly faster (can be performed in 2 weeks), requires less effort (from both the vendor and the client), and it provides significantly greater information.

5) Solicitation & Evaluation Support

Once a solicitation is advertised/posted, we perform all critical activities that occur during the proposal/bid/evaluation stage. As an example, for an RFP solicitation, we perform the following:



- Prepare and provide a Pre-Proposal Presentation (PowerPoint) to educate vendors
- Review vendor questions and assist in preparing responses, develop and issue addenda as required
- Prepare a Source Selection Plan (SSP), which includes instructions for evaluators on how to score proposals, interviews, presentations, demos, etc. The SSP also provides evaluation forms to be completed by the evaluators
- Educate and train Evaluators on the evaluation process, guidelines, and rating forms
- Performing any modelling and shortlisting necessary
- Facilitate the development of questions for potential vendor interviews and prepare letters inviting potential vendors, detailing the process and questions
- Facilitate the development of software product demonstration criteria (if applicable)
- Collect & compile proposal information and evaluator ratings and create an evaluation matrix to prioritize all proposers
- Review the final recommendation for contract award to verify consistency and alignment with the evaluations, scoring and official documentation
- Develop vendor debriefing materials and facilitate (and/or conduct) the debriefing process
- Assist in pre-contract negotiations, including coordination of negotiation meetings, verifying and validating scope deliverables, assuring that the vendor has developed a project work plan with all methodologies, approaches, assumptions and expectations, and finalizing the contract documents
- Prepare a final close-out report summarizing the procurement process

6) Post Award Support

Depending on the type of project/service and needs of the client agency, our team also assists with post award support. This includes activities such as:

- Assist with monthly performance metrics documenting any time or financial impacts
- Assist with change management activities, such as development of a communication strategy, best-practice on implementation/roll out best practices, UAT (user acceptance testing), and pilot testing
- Assist with change adoption activities, such as measuring user adoption levels at key points, developing reporting metrics to executives, and sharing best practices to increase adoption
- Assist with professional development and talent management, such as developing individualized training, process training, sustaining/onboarding training, guidebooks/templates to teach new processes, etc.



7) Fairness Advising and Procurement Oversight Support

Although Simplar can provide 'turnkey' procurement services, there are times when a public organization is more than capable of conducting the procurement on their own. However, these agencies may be looking for procurement oversight and fairness advising to provide a third-party oversight of the procurement. This is performed to assure the public and the vendor community that the procurement is being conducted 'fairly'.



As an example, the State of Alaska hired us to provide procurement oversight for their statewide Pharmacy Benefits Management (PBM) procurement. This project was one of the State's most complex procurements, which would manage over 88,000 statewide employee's pharmacy benefits. The State was concerned about potential delays caused by supplier protests (since this was a \$2.5 Billion contract). This procurement was also highly sensitive since the previous time that the State attempted to procure this service, only 1 supplier proposed. The Simplar team was asked to provide procurement oversight and third-party fairness advising, and the State was able to award this contract without any legal challenges or protests.

Our "Fairness Report" will provide:

1. A summary of the procurement & award process
2. An assessment of the RFx/RFP solicitation
3. An assessment of the evaluation & selection procedures
4. Lessons learned or future recommendations

8) Solicitation Report Cards

The most commonly protested items/topics include:

- Poorly written scope requirements
- Failure to follow the process laid out in the solicitation/tender
- Unclear/ambiguous award criteria
- Failure to adequately document results
- Inadequate debriefing – confusion on why they lost

Our in-depth knowledge of procurement has resulted in a Solicitation checklist or 'Report Card' that can be utilized to mitigate protest risk. Our checklist reviews over 30 items, based on 7 different procurement dimensions. This includes:

- 1) Openness of the Procurement
- 2) Transparency of the Procurement
- 3) Fairness of the Procurement
- 4) Procurement utilizes value-driven principles
- 5) Completeness and accuracy of the scope of work
- 6) Quality of submittal forms and attachments
- 7) Overall solicitation format

These are key elements that the Simplar team will provide on each and every project that we support your members with.



Procurement Examples

Instructions: Respondents are asked to provide at least three (3) examples of specific procurements, including the services that were being proposed or procured, their role in the procurement process, and any other information that will help SHARE understand the nature and scope of the procurement.

Our team has provided procurement services and support on over 3,000 projects (\$11B), for governments and other organizations throughout North America, from complex IT systems/software to simple commodities purchases. Below are some specific examples:

Example #1: School District Support

Example #2: Complex Software Procurement Support

Example #3: Procurement Innovation & Contracting Out

Example #4: Infrastructure Procurement Support

Example #5: Improving Small Business & Diversity Participation

Example #6: Procurement Training & Certification

Example #7: Market Led Opportunities

Example #1: School District Support – Dallas Independent School District

In many cases, smaller school districts lack the proper internal resources to conduct procurements effectively. However, even larger school districts have challenges as well. Once such district that we assisted was the Dallas Independent School District (DISD). The DISD had encountered issues with the performance of their roofing systems. The district was spending millions of dollars on roofing systems that were failing prematurely. DISD reached out to us to assist them with developing a procurement strategy that could:

- 1) Improve the outcome of the roofing system (purchase systems that would last)
- 2) Improve the overall value of service (not have to spend more money)
- 3) Improve their internal management resources (reduce the amount of time the DISD had to spend with facility managers and maintenance personnel to fix problems)

Our team worked with the lead Facility Manager (FM) from DISD to develop a new approach for procuring roofing. This program would award projects to the overall best roofers/roofing solutions, versus just the cheapest systems. DISD identified 9 roofs that needed immediate repair. Our team assisted DISD with the following:

- Developed and prepared a single RFP
- Developed procedures to distribute the awards. DISD was concerned about awarding too many of these projects to one contractor (concerns about their resources, and performance concerns). Therefore, we created language in the RFP to provide DISD with flexibility to distribute the awards across multiple contractors. This was achieved by establishing rules that would only award a maximum of 33% of the work to one contractor and only 60% on a particular roofing system/product.
- We assisted DISD with developing the criteria and weighting schemes.
- We assisted DISD with developing a survey questionnaire that would be sent to past clients, who would evaluate the roofing contractors. We then assisted DISD with collecting and compiling these surveys (which was over 130 returned surveys).

DISD was able to award to 4 different contractors and was able to do it at 13% below their published budget (saving them approximately \$600,000). Approximately 5 years later, DISD performed a survey on these installed roofs and documented that there had been no issues and that the roofs were all performing.

Example #2: Complex Software Procurement – University of Ottawa

Software procurements have the biggest failure rate of any industry in terms of performance outcomes. On average only 18-20% of software procurements are considered a success. Consultants that follow a very traditional procurement approach can exacerbate this problem (which is a main contributor to the poor success rate). These types of procurements require a tremendous amount of procurement knowledge and skillset to maximize the probability of success.

In 2020, our team provided procurement assistance to the University of Ottawa regarding their transition to an ERP Software Solution from their existing legacy systems. This was one of the most complex procurements in university history due to the highly decentralized departments within the University (many departments and faculties have their own home-grown systems that have been in use for over 12 years). The following list highlights some of the activities that we performed:

- Utilized industry expertise to recommend a 2-stage ERP procurement approach
- Review critical information on existing financial and HR systems
- Outreach to vendor community to collect information regarding their critical needs
- Compiled 'current state' and 'future state' information
- Educated internal staff and Subject Matter Experts on best-practices and provide advice on strategies to maximize the ability to partner with the best vendor in the fastest amount of time spent in procurement
- Developed a procurement schedule
- Developed the RFSQ and RFP documents, along with all supporting submittal forms
- Developed the evaluation criteria, weights, and submittal forms
- Provided procurement oversight through the process of selecting the software/integrator vendor
- Prepare and provided a Pre-Proposal Presentation (PowerPoint) to educate vendors
- Prepared and evaluator guide (instructions and rating forms)
- Prepared interview questions and software demonstration scripts
- Compiled all proposal information & evaluator ratings to prioritize all proposers
- Assist in pre-contract clarification activities including verifying and validating scope deliverables, work plans, approaches, assumptions and expectations, and support for finalizing the contract documents
- Assist in the development of vendor debriefing materials and facilitate the debriefing process

Using the approach of the Simplar team, the University allowed us to implement a unique 2-step approach (to pre-qualify 2-3 software products, and then to select the overall best integrator). The Simplar best-value approach allowed us to complete the entire procurement in under 12 months (which was 50% faster than the client's traditional process). To add to the complexity of this procurement, this effort began during the start of the COVID-19 pandemic, yet our team was able to quickly adjust (to 100% online/distance support) with absolutely no impact to our services/support.

Example #3: Procurement Innovation & Contracting Out – City of Phoenix

The City of Phoenix (Arizona) had been operating its waste recycling program for basically the same way for over 30 years. Part of their process included self-managing the management and operations of their central recycling facilities where the collected materials would be delivered and sorted based upon materials type (cardboard, papers, metals, plastics, glasses, etc.).

Using our team's expertise in procurement innovation, we crafted a unique RFP process that allowed the proponents to submit both a traditional

proposal as well as an innovative and technology infused solution. Our selection and evaluation tools allowed a fair and comprehensive review of all vendors (and resulted in zero protests). The winning vendor submitted an entirely new concept for the city. This included full outsourcing and a zero-fee contract, where the vendor's costs would be covered by producing high quality, top dollar recycling packages that could be sold to various parties (primarily overseas) with a profit-share tiering of risk and cost based on real-time market rates.

The structure of our RFP allowed the vendor to recommended a 7-year contract (compared to the traditional 5-year contract). This adjustment would allow them to install state-of-the-art laser and imaging technology, sorting robotics, and other mechanical advancements their company was developing and implementing (and after 7-years, the new technology would revert to the City's ownership).

The automated processes would replace the labor-intensive hand-sorting process, which had an average two-week turnover of employees (people disliked the work that it was difficult to maintain staff). The traditional process resulted in poor-quality recycling packaging (which resulted in a lower sales price). The new program dramatically improved the quality of materials by over 50%, resulting in higher pricing (from overseas buyers). The program was able to greatly reduce the amount of internal City management and transformed their overall approach to recycling materials management.

Example #4: Procurement Support - City of Los Angeles

Our team has been assisting the City of Los Angeles Department of Water and Power with project support, needs assessments, scope of work development, vendor training, RFP development, vendor selection, and contract negotiation services for several highly complex infrastructure projects (over \$1 Billion). The Simplar team educated and trained 30+ internal subject matter experts and evaluators, developed RFP and RFSQ documents, educated over 40 suppliers, reviewed over 140 proposals, and assisted in pre-qualifying 20 consultants. The evaluation process was 50%-80% faster than the traditional procurement approach and the RFP approach significantly improved the opportunities to small and targeted businesses.

Example #5: Improving Small Business & Diversity - University of Minnesota

Our team worked with the University of Minnesota's Capital Planning and Project Management (CPPM) Department to transform their procurement practices related to capital improvement projects. Part of this effort was to address the 'Social Procurement' issues related to the University's objectives. The University had an informal goal of awarding up to 5% of work to 'Targeted Businesses'. This included underrepresented groups such as minority-owned firms, women-owned firms, veteran-owned firms, and disabled-owned firms. The University was seeking ways to meet this target.

The Simplar team worked with the University Department to restructure their procurement approach to improve evaluation fairness. Our team suggested to eliminate vendor names from portions of the written proposals (that would be scored by evaluators). The reasoning behind this change was to allow evaluators to focus more on the proposal contents, and eliminate any bias that an evaluator may have by simply reading a company name. After implementing this approach for approximately 18 months, the percent of work that was awarded to 'Targeted Businesses' (small, local, and targeted businesses) significantly increased to over 16% (compared to less than 5% prior to this change). Our efforts to restructure the procurement procedures to maximize fairness, resulted in a 228% increase in small business & diversity participation! This was a significant impact, and illustrated that if small business are truly given a fair environment to compete, they can actual provide greater performance and value (compared to the 'big-named' firms). We are very proud of this accomplishment, and have seen similar results in other organizations that have adapted this approach.

Example #6: Procurement Training & Certification – State of Idaho

Procurement professionals play an integral role in all Public Agencies by providing oversight and support of the purchasing process, and assuring that the Agency follows all public policies, rules, and regulations. The procurement professional also serves as a representative of the Public, and is responsible for safeguarding the Public from unethical behaviors related to purchasing.

Our team is partnered with the State of Idaho and developing the State's first 'Procurement Certification' program. The goals of the program are to enhance the current abilities of all procurement professionals, improve confidence in their roles during the procurement processes, improve consistency of applied policies and procedures, and to become more effective leaders during the purchasing and procurement process. This program includes over 20 online/virtual classes related to procurement policies, solicitations, RFP's, ITB's, and RFQ's.

Example #7: Market Led Opportunities – Provincial Government

Recently, our team worked with the government of British Columbia to develop and facilitate a 'Market Led' initiative for the Justice Department. This was called "Access to Justice (A2J)" Week, and was focused on innovative solutions that could benefit the Justice system and/or the public that utilize Justice services.

The intent of this program was to provide suppliers with an opportunity to showcase their products, solutions, services during a 2-week convention. The convention was focused 5 major topics or themes that suppliers could participate in. This activity provided the Department with a simple and effective way to discover new & unique technology that they were previously unaware of.

A great example of this approach was the idea of a 'divorce app'. As funny as this sounded, the existing process to get divorced in BC were fairly complex and cumbersome. The process could take several weeks to navigate. Through the market-led approach, a supplier proposed the idea of developing and implementing a new divorce app for the Justice Department. This app would simplify the process, and decrease the time it takes to apply for a divorce to a matter of minutes (versus weeks). The app could also be translated into different languages (common to BC) to allow greater access by the public.

How Simplar Manages and Secures Data

Instructions: How will you manage and secure NCTCOG and client data?

Simplar utilizes Google's G-Suite Business Services to store and secure all of our data and files. We also employ strict data management rules within our organization. We are all trained in IT security best practices and take annual review of the best-practices and most current schemes, scams, and dangers to businesses. We also do not have any other internal data warehousing, mainframes, or systems in place that may cause any security risks. Although Google servers and the best efforts may not be 100% hacker-proof (we are unaware of

any system that is), we have never encountered a security issue in our history. All NCTCOG and Client data will be stored in the cloud via secure Google servers. If NCTCOG and/or the client has any additional or special data instructions, we will work to accommodate them and can keep all data off the cloud and only available via hard storage. As an example, we have worked on classified projects, including with the military, defense contractors, space programs, high-technology clients, medical data, and with nuclear programs, where all information was stored on the clients' internal servers and we only utilized their systems and data management with the access rights we were given. We are very well versed in data management, data security, and working within any client constraints and requirements for data.

How Simplar Finds and Notifies Vendors of Solicitation Opportunities

Instructions: How do you find and select vendors to be notified of solicitations?

Over the past decade, many public organizations have developed internal vendor registries (through the incorporation of ERP's and Purchasing software systems). These "registries" are basically lists where vendors have signed up to receive notifications of opportunities from that organization. These lists minimize the organizations need to further advertise the opportunity in a newspaper, magazine, or other periodical. In our experience, most "larger" types of public organization have these internal vendor registries already established. Therefore, our primary method of notifying vendors would be by utilizing these pre-established lists.

However, if a smaller public agency does not have an internal vendor registry, there are other methods that can be utilized to distribute the solicitation:

- **BidPrime:** BidPrime is an online solicitation platform that advertises solicitations to vendors throughout North America. Simplar currently has an existing license with BidPrime and is able to advertise all public solicitations on this site (free of charge). This is another excellent tool that can be utilized to notify vendors (with very little effort).
- **Trades:** Depending on the type of product or service that is being procured, reaching out to a trade organization is another good way to reach out to vendors. For example, if a client has a construction project to procure, we could reach out to AGC (Associated General Contractors of America) to have them notify their vendors about this opportunity. AGC represents more than 27,000 construction firms and has chapters throughout the US (including Texas). Similar groups are established in most of the major industries.
- **Newspaper/Magazines/Periodicals:** The traditional method of advertising has been through a newspaper. This can be done fairly easily and economically.
- **Other Agencies:** Another option would be to reach out to similar public organizations for assistance with a list of vendors. For example, if a small school district that does not have an internal registry, we can reach out to a larger school district (nearby) to identify if they have a list that can be utilized as a starting point. This would generally be a supplement to normal public advertising (newspaper).

Team Involvement

Instructions: How will you involve our team and business in the RFP process?

From the Q&A, we understand that NCTCOG/SHARE does not anticipate involvement in a SHARE Member's project. To confirm, our services would not require any involvement from the NCTCOG. Our team is capable of performing 100% of these services on our own, between Simplar and the SHARE Member.

We also understand that NCTCOG may also want to utilize our services for potential NCTCOG solicitations. This would not be an issue or challenge. All of the same tasks and activities that we would provide to the SHARE Members would also be available to NCTCOG as well. The level of involvement of NCTCOG in this situation would be driven by NCTCOG itself (NCTCOG may request very minimal involvement or may request additional involvement and oversight – depending on the item being procured).

References

Instructions: Can you provide references for procurement projects similar to ours?

Yes, a list of reference has been provided in Tab E

Designated Contact

The following individual can be contacted for all phases of this effort:

Work Phase	Contact Name	Phone	Email
(1) bid process	John Savicky	602-326-2330	John.savicky@simplar.com
(2) contracting process	John Savicky	602-326-2330	John.savicky@simplar.com
(3) contract administration	John Savicky	602-326-2330	John.savicky@simplar.com



TAB E

REFERENCES

The Simplar team has had a proven track record of meeting customer expectations. We are proud to say that Simplar Sourcing Solutions has **never had a procurement protested**. This is a testament to our proficient understanding and expertise in public procurement policies and procurement fundamentals. We are consistently able to procure projects faster (when compared to traditional RFP approaches). The following list of references validates our expertise in scope of work development, RFP development, evaluation and selection processes, and contract negotiations.

Owner / Address	Contact	Phone Email
Los Angeles Department of Water & Power [111 N Hope Street, Los Angeles, CA 90012]	Erin Lawrence	(213) 367-2586 Erin.Lawrence@ladwp.com
State of Alaska [333 Willoughby Ave., Juneau, AK 99801]	Jason Soza	(907) 723-8586 jsoza@govsourcing.com
Seattle City Light [700 5th Ave, Seattle, WA, 98104]	Kim Rayray	(206) 684-3042 kim.rayray@seattle.gov
Western University [1151 Richmond Street, London, ON, N6A 3K7]	Peter Jeffs	(519) 661-2111 x (84584) purpgj@uwo.ca
University of Ottawa [75 Laurier Ave. E, Ottawa, ON, K1N 6N5]	Roger Wills	(613) 562-5800 x 7113 rwills@uottawa.ca

REFERENCE PROJECT 1

Owner: City of Los Angeles – Department of Water and Power

Project: Groundwater Remediation (progressive design-build)

Size: \$450 Million

Project Summary: The Simplar team provided procurement oversight and fairness advising on a critical infrastructure project. This was the largest design-build (DB) project performed on utilities in North America. The Groundwater Treatment Plant (\$450+ Million) involved hiring a DB Firm (under a progressive design-build process) to design and construct facilities to restore the quality of groundwater in the San Fernando Basin (in the City of Los Angeles). This basin is one of the largest contaminated groundwater areas in the United States. The Simplar team provided procurement support, evaluator training, oversight, and advising, which resulted in 0 protests, complaints, or legal challenges.



REFERENCE PROJECT 2

Owner: State of Alaska

Project Summary: This project included the replacement of the State's finance systems, HR systems, procurement system, and payroll systems. Since this system upgrade would result in a 10-year contract, which would impact all 22,000 State employees, it was a highly sensitive project that required higher levels of our oversight and support. The State brought in the Simplar team to review and capture the scope-of-work, requirements, prepare an RFP document, provide vendor training, provide support during vendor evaluation and selection, and provide general procurement oversight. Our team worked with the State's existing software consultant to prepare a streamlined RFP document that would allow the State to maximize procurement fairness, which in return, would minimize the probability of a vendor/supplier protest. Our team was able to reduce the evaluation process by **approximately 50% faster** than the traditional procurement approach. The project was awarded within the State's anticipated budget and also without any legal challenges/protests.



REFERENCE PROJECT 3

Owner: : Seattle City Light

Project Summary: Our team provided hands-on selection support for more than a dozen projects, including software, engineering, and professional services. The City's main objectives were to accelerate their selection process, enhance SOW processes, improve fairness of evaluations, and attract the best supplier teams. Results of Simplar's involvement include **50% time savings** on RFPs, improved Scope of Work and requirements definition, and selection of high-quality suppliers.



REFERENCE PROJECT 4

Owner: University of Ottawa

Project: ERP Upgrade

Size: \$35 Million

Project Summary: The Simplar team recently assisted the University of Ottawa on one of their largest and most complex procurements; a \$35 Million Enterprise Resource Planning (ERP) software upgrade and modernization program. Simplar provided procurement support, RFP development, evaluator training, and advising with regards to a 2-step procurement approach. With Simplar's direction and leadership, the University of Ottawa was able to complete the procurement 50% faster (compared to their traditional model).



uOttawa

REFERENCE PROJECT 5

Owner: Western University

Project Summary: The Simplar team provided procurement support and advising to Western University Ontario on 20 large and highly sensitive procurements, including: Café renovation, waste management services, turnover cleaning services, building analytics, landscape services, elevator services, moving services, varsity sports transportation, energy and infrastructure optimization, travel management, pension services, cold beverage services, furniture services, parking systems, and more. Our support with Western were recognized throughout the industry, and received awards in procurement excellence by CPE and OUPMA. The same team would also be assigned to lead this effort.





uOttawa

Letter of Recommendation

To whom it may concern,

I am a Senior Procurement Officer at the University of Ottawa, and have been involved with procurements for over 20 years.

In 2020, I began working with John Savicky (and the Simplar team) on an ERP project at the University of Ottawa. This was one of the most important technology procurements that the University has undertaken, and a very complex project due to the existing environment (highly decentralized departments) of our University. This procurement also began right in the beginning of the COVID-19 pandemic.

John and his team were involved in all aspects of this complex procurement. From my perspective, he not only helped me navigate the complexities of an IT/Software procurement, but also helped teach and mentor me on new/alternative procurement practices. His support and experience were invaluable to me. His guidance and mentorship will allow me to use these newly acquired techniques on all projects that I am involved with moving forward.

It is with pleasure and without any hesitation that I recommend John and the Simplar team to anybody that is seeking procurement assistance.

A handwritten signature in blue ink that reads "RWills".

Roger

Roger Wills, CSCMP, C.P.P.
Senior Procurement Officer, Research
Strategic Project Management Group (SPMG) | Procurement Services
University of Ottawa
1 Nicholas St., Ottawa ON K1N 7B7 (303)
Tel.: 613-562-5800 x7113
eMail : rwills@uottawa.ca



March 10, 2021

**Re: Simplar's support for Information Technology (IT) Procurements
Letter of Recommendation**

To Whom It May Concern:

I am writing to highly recommend Simplar's ability to support Information Technology (IT) procurements. I have worked with Brian Lines and the Simplar team for more than two years on multiple software procurements along with related professional development and training events.

Specific projects that Simplar has supported me on include the entire solicitation process for:

- **Compensation System (Financial Software):** a financial system which was required to meet the complexities associated with administering payroll based on employee sales performance and multiple incentive compensation plans for a highly regulated industry. Simplar helped make this procurement a success under the challenges of a large-sized project and compressed timeline.
- **Anti-Money Laundering (AML) Solution:** an upgrade from a "home grown" legacy system. Brian and the Simplar team facilitated the requirements gathering process with our internal Business Partners, conducted a Request for Information process, helped develop the RFP and supported us through a thorough evaluation process. We relied on their support and expertise during pre-contract planning and clarification efforts with the selected supplier.

The biggest complement I can give is that I can never do RFPs the "old" way after working with Simplar. We used to do RFPs with hundreds of lines of requirements and then get overwhelmed by the amount of unnecessary information we requested (and then received) from the RFP participants. Simplar helped my Business Partners, and myself, to better define the project goals and requirements and to simplify our RFPs. They cut out the marketing fluff from supplier proposals and focused our efforts on what really matters to the overall success of a project: clear and well-defined requirements to attract the best suppliers, and make a solid selection decision.

Simplar has also helped our Procurement Department and Enterprise Project Management Office (EPMO) to develop custom templates & training for Requirements gathering, Requests for Information, and multiple Request for Proposal approaches. These have been great resources!


In closing, I highly recommend Simplar and am confident in their ability to support a wide-variety of Information Technology projects from "cradle-to-grave" of initial scope requirements and request for needs assessment through the entire solicitation process.

Sincerely,

A handwritten signature in black ink that reads "Esmeralda Phillips".

Esmeralda Phillips, CPSM, C.P.M.

Strategic Sourcing Business Partner  **Waddell & Reed Corporate LLC**

 6300 Lamar Avenue, Shawnee Mission, KS 66201-9217

 ephillips@waddell.com |  913.236.1710 |

Letter of Recommendation

To whom it may concern,

I am the former Chief Procurement Officer (CPO) for the State of Alaska. I was introduced to the Simplar team back around 2014 when we utilized their process and procedures to procure a Statewide telecommunications services contract. This was a highly complex and highly sensitive procurement that included telephone services, data & networking, video conferencing, and help-desk support for the entire State 17,000 staff employees. The Simplar team helped us in structuring a robust RFP solicitation document (that maximized fairness), helped educate and train our vendors, and educated and trained our internal evaluation committee. This project was estimated to cost \$50 Million (based on previous contracts), but with the best-value approach that we implemented, we were able to save almost \$3.5 Million and increase the overall quality/value of services. It was a significant win for the State. The Simplar team also worked with the State on several other high-risk, high-dollar, and highly-sensitive projects, including:

- Statewide ERP Software Solution
- Statewide Pharmacy Benefit Management
- Statewide Wellness & Disease Management Services

In my 20+ years of procurement experience, I can say that very few organizations have had the impact and value that the Simplar team has brought. It is with pleasure and without any hesitation that I recommend the Simplar team to any organization that is seeking to improve the way they procure services.



Jason

Jason Soza, CPPO, CSSBB
Former Chief Procurement Officer (CPO) – State of Alaska
Vice President - Government Sourcing Solutions
907-723-8586
jsoza@govsourcing.com



TAB F

PROPOSAL PRICING

EXHIBIT D

Pricing Proposal (Firm/Organization)

Respondents are to provide a rate chart for the labor categories/ skill sets outlined below. All rates should be presented as fully loaded hourly rates. Include any other cost categories that should be considered within the "other" category. Attach extra sheets, as necessary. Respondents are encouraged to offer additional Public Sector Procurement Consulting functions and services as options for retainer under this solicitation.

Pricing Format Request Example		Procurement No.: NCT 2021-083
Respondent Name:	Simplar Sourcing Solutions LLC	
Notes:	<ol style="list-style-type: none"> 1. This pricing sheet is an EXAMPLE of how pricing should be submitted for RFP 2021-083 2. Please provide hourly rates for all staff that would be involved in Procurement related projects. 3. Use as many lines as needed. 4. Detail any additional information necessary. 5. Proposers are encouraged to offer additional Public Sector Procurement Consulting functions or services to be offered as a catalog option. Please provide any additional options with 'list less' or 'cost plus percentages for pricing. A copy of any catalog services your firm can provide should be included with this response. 	

Public Sector Procurement Consulting Services Rate Chart - SHARE Cooperative Purchasing Program

Item	Description	Offered Price
1	Executive Leadership	\$147/hr
2	Purchasing Manager Sr	\$118/hr
3	Procurement Educator & Trainer	\$84/hr
4	Purchasing Assistant	\$77/hr
5	Procurement Specialist	\$77/hr
6	Procurement Technician	\$77/hr
7	Procurement Trainer	\$77/hr
8	Fairness Monitoring & Advising	\$73/hr
9	Administration	\$52/hr



TAB G

REQUIRED
ATTACHMENTS

REQUIRED ATTACHMENT CHECKLIST

Please utilize this checklist to ensure that all required attachments are included with your proposal. IF AN ATTACHMENT DOES NOT APPLY, PLEASE MARK AS “**NOT APPLICABLE**” AND SUBMIT WITH THE PROPOSAL. FAILURE TO SUBMIT **ALL REQUIRED DOCUMENTS** MAY NEGATIVELY IMPACT YOUR EVALUATION SCORE.

- ☒ Page 1 - Cover Sheet
- ☒ Page 19 - Attachment I: Instructions for Proposals Compliance and Submittal
- ☒ Page 20 - Attachment II: Certification of Offeror
- ☒ Page 21 - Attachment III: Certification Regarding Debarment
- ☒ Page 22 - Attachment IV: Restrictions on Lobbying
- ☒ Page 24 - Attachment V: Drug-Free Workplace Certification
- ☒ Page 25 - Attachment VI: Certification Regarding Disclosure of Conflict of Interest
- ☒ Page 27 - Attachment VII: Certification of Fair Business Practices
- ☒ Page 28 - Attachment VIII: Certification of Good Standing Texas Corporate Franchise Tax Certification
- ☒ Page 29 - Attachment IX: Historically Underutilized Businesses, Minority Or Women-Owned Or Disadvantaged Business Enterprises
- ☒ Page 30 - Attachment X: Prohibited Telecommunications And Video Surveillance Services Or Equipment Certification
- ☒ Page 31 - Exhibit A: Service Area Designation Forms
- ☒ Page 34 - Exhibit B: Description of Desired Services for Proposed Pricing
- ☒ Page 36 – Exhibit C: Pricing Proposal (Individual)
- ☒ Page 37 - Exhibit D: Pricing Proposal (Firm/Organization)
- ☒ Respondent recognizes that all proposals must be submitted electronically through Public Purchase by the RFP due date and time. All other forms of submissions will be deemed nonresponsive and will not be opened or considered.

**ATTACHMENT I:
INSTRUCTIONS FOR PROPOSALS COMPLIANCE AND SUBMITTAL**

Compliance with the Solicitation

Submissions must be in strict compliance with this solicitation. Failure to comply with all provisions of the solicitation may result in disqualification.

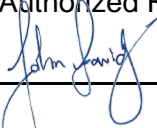
Acknowledgment of Insurance Requirements

By signing its submission, Offeror acknowledges that it has read and understands the insurance requirements for the submission. Offeror also understands that the evidence of required insurance may be requested to be submitted within ten (10) working days following notification of its offer being accepted; otherwise, NCTCOG may rescind its acceptance of the Offeror's proposals. The insurance requirements are outlined in Section 6.04.

Name of Organization/Contractor(s):

Simplar Sourcing Solutions, LLC

Signature of Authorized Representative:



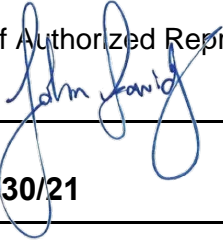
Date: **11/30/21**

**ATTACHMENT II:
CERTIFICATIONS OF OFFEROR**

Name of Organization/Contractor(s):

Simplar Sourcing Solutions, LLC

Signature of Authorized Representative:



Date: **11/30/21**

**ATTACHMENT III:
CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS**

This certification is required by the Federal Regulations Implementing Executive Order 12549, Debarment and Suspension, 45 CFR Part 93, Government-wide Debarment and Suspension, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668, 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned certifies, to the best of his or her knowledge and belief, that both it and its principals:

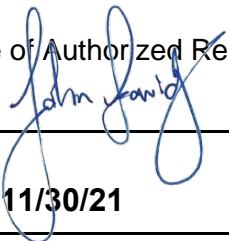
1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency;
2. Have not within a three-year period preceding this contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or Local) transaction or contract under a public transaction, violation of federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false Proposals, or receiving stolen property;
3. Are not presently indicated for or otherwise criminally or civilly charged by a government entity with commission of any of the offense enumerated in Paragraph (2) of this certification; and,
4. Have not within a three-year period preceding this contract had one or more public transactions terminated for cause or default.

Where the prospective recipient of federal assistance funds is unable to certify to any of the qualifications in this certification, such prospective recipient shall attach an explanation to this certification form.

Name of Organization/Contractor(s):

Simplar Sourcing Solutions, LLC

Signature of Authorized Representative:



Date:

11/30/21

ATTACHMENT IV: RESTRICTIONS ON LOBBYING

Section 319 of Public Law 101-121 prohibits recipients of federal contracts, grants, and loans exceeding \$100,000 at any tier under a federal contract from using appropriated funds for lobbying the Executive or Legislative Branches of the federal government in connection with a specific contract, grant, or loan. Section 319 also requires each person who requests or receives a federal contract or grant in excess of \$100,000 to disclose lobbying.

No appropriated funds may be expended by the recipient of a federal contract, loan, or cooperative agreement to pay any person for influencing or attempting to influence an officer or employee of any federal executive department or agency as well as any independent regulatory commission or government corporation, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any of the following covered federal actions: the awarding of any federal contract, the making of any federal grant, the making of any federal loan the entering into of any cooperative agreement and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

As a recipient of a federal grant exceeding \$100,000, NCTCOG requires its subcontractors of that grant to file a certification, set forth in Appendix B.1, that neither the agency nor its employees have made, or will make, any payment prohibited by the preceding paragraph.

Subcontractors are also required to file with NCTCOG a disclosure form, set forth in Appendix B.2, if the subcontractor or its employees have made or have agreed to make any payment using nonappropriated funds (to include profits from any federal action), which would be prohibited if paid for with appropriated funds.

**LOBBYING CERTIFICATION
FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS**

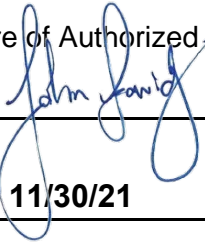
The undersigned certifies, to the best of his or her knowledge or belief, that:

1. No federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an officer or employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal loan, the entering into of any cooperative Contract, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative contract; and
2. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan, and or cooperative contract, the undersigned shall complete and submit Standard Form – LLL, “Disclosure Form to Report Lobbying”, in accordance with the instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers and that all sub-recipients shall certify accordingly.

Name of Organization/Contractor(s):

Simplar Sourcing Solutions, LLC

Signature of Authorized Representative:



Date: **11/30/21**

**ATTACHMENT V:
DRUG-FREE WORKPLACE CERTIFICATION**

The **Simplar Sourcing Solutions, LLC** (company name) will provide a Drug Free Work Place in compliance with the Drug Free Work Place Act of 1988. The unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited on the premises of the **Simplar Sourcing Solutions, LLC** (company name) or any of its facilities. Any employee who violates this prohibition will be subject to disciplinary action up to and including termination. All employees, as a condition of employment, will comply with this policy.

CERTIFICATION REGARDING DRUG-FREE WORKPLACE

This certification is required by the Federal Regulations Implementing Sections 5151-5160 of the Drug-Free Workplace Act, 41 U.S.C. 701, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668 and 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned subcontractor certifies it will provide a drug-free workplace by:

Publishing a policy Proposal notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the consequences of any such action by an employee;

Establishing an ongoing drug-free awareness program to inform employees of the dangers of drug abuse in the workplace, the subcontractor's policy of maintaining a drug-free workplace, the availability of counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed on employees for drug violations in the workplace;

Providing each employee with a copy of the subcontractor's policy Proposal;

Notifying the employees in the subcontractor's policy Proposal that as a condition of employment under this subcontract, employees shall abide by the terms of the policy Proposal and notifying the subcontractor in writing within five days after any conviction for a violation by the employee of a criminal drug abuse statute in the workplace;

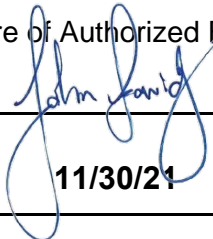
Notifying the Board within ten (10) days of the subcontractor's receipt of a notice of a conviction of any employee; and,

Taking appropriate personnel action against an employee convicted of violating a criminal drug statute or requires such employee to participate in a drug abuse assistance or rehabilitation program.

Name of Organization/Contractor(s):

Simplar Sourcing Solutions, LLC

Signature of Authorized Representative:



Date: **11/30/21**

**ATTACHMENT VI:
CERTIFICATION REGARDING DISCLOSURE OF CONFLICT OF INTEREST**

The undersigned certifies that, to the best of his or her knowledge or belief, that:

"No employee of the contractor, no member of the contractor's governing board or body, and no person who exercises any functions or responsibilities in the review or approval of the undertaking or carrying out of this contract shall participate in any decision relating to this contract which affects his/her personal pecuniary interest.

Executives and employees of contractor shall be particularly aware of the varying degrees of influence that can be exerted by personal friends and associates and, in administering the contract, shall exercise due diligence to avoid situations which give rise to an assertion that favorable treatment is being granted to friends and associates. When it is in the public interest for the contractor to conduct business with a friend or associate of an executive or employee of the contractor, an elected official in the area or a member of the North Central Texas Council of Governments, a permanent record of the transaction shall be retained.

Any executive or employee of the contractor, an elected official in the area or a member of the NCTCOG, shall not solicit or accept money or any other consideration from a third person, for the performance of an act reimbursed in whole or part by contractor or Department. Supplies, tools, materials, equipment or services purchased with contract funds shall be used solely for purposes allowed under this contract. No member of the NCTCOG shall cast a vote on the provision of services by that member (or any organization which that member represents) or vote on any matter which would provide a direct or indirect financial benefit to the member or any business or organization which the member directly represents".

No officer, employee or paid consultant of the contractor is a member of the NCTCOG.

No officer, manager or paid consultant of the contractor is married to a member of the NCTCOG.

No member of NCTCOG directly owns, controls or has interest in the contractor.

The contractor has disclosed any interest, fact, or circumstance that does or may present a potential conflict of interest.

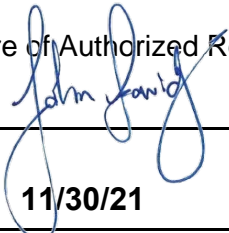
No member of the NCTCOG receives compensation from the contractor for lobbying activities as defined in Chapter 305 of the Texas Government Code.

Should the contractor fail to abide by the foregoing covenants and affirmations regarding conflict of interest, the contractor shall not be entitled to the recovery of any costs or expenses incurred in relation to the contract and shall immediately refund to the North Central Texas Council of Governments any fees or expenses that may have been paid under this contract and shall further be liable for any other costs incurred or damages sustained by the NCTCOG as it relates to this contract.

Name of Organization/Contractor(s):

Simplar Sourcing Solutions, LLC

Signature of Authorized Representative:



Date: **11/30/21**

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

FORM CIQ

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.

**** NOT APPLICABLE ****

2 ☐ Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐ Yes

☐ No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐ Yes

☐ No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

Signature of vendor doing business with the governmental entity

Date

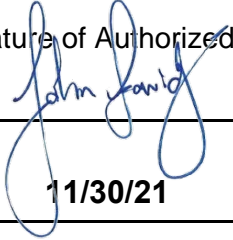
**ATTACHMENT VII:
CERTIFICATION OF FAIR BUSINESS PRACTICES**

That the submitter has not been found guilty of unfair business practices in a judicial or state agency administrative proceeding during the preceding year. The submitter further affirms that no officer of the submitter has served as an officer of any company found guilty of unfair business practices in a judicial or state agency administrative during the preceding year.

Name of Organization/Contractor(s):

Simplar Sourcing Solutions, LLC

Signature of Authorized Representative:



Date: **11/30/21**

**ATTACHMENT IX:
HISTORICALLY UNDERUTILIZED BUSINESSES, MINORITY OR WOMEN-OWNED OR DISADVANTAGED
BUSINESS ENTERPRISES**

Historically Underutilized Businesses (HUBs), minority or women-owned or disadvantaged businesses enterprises (M/W/DBE) are encouraged to participate in the solicitation process. Representatives from HUB companies should identify themselves and submit a copy of their certification.

NCTCOG recognizes the certifications of both the State of Texas Program and the North Central Texas Regional Certification Agency. Companies seeking information concerning HUB certification are urged to contact:

State of Texas HUB Program
Texas Comptroller of Public Accounts
Lyndon B. Johnson State Office Building
111 East 17th Street
Austin, Texas 78774
(512) 463-6958
<http://www.window.state.tx.us/procurement/prog/hub/>

Local businesses seeking M/W/DBE certification should contact:

North Central Texas Regional Certification Agency
624 Six Flags Drive, Suite 100
Arlington, TX 76011
(817) 640-0606
<http://www.nctrca.org/certification.html>

Submitter must include a copy of its minority certification documentation as part of this solicitation.

If your company is already certified, attach a copy of your certification to this form and return with your proposal.

Indicate all that apply:

_____ Minority-Owned Business Enterprise

_____ Women-Owned Business Enterprise

_____ Disadvantaged Business Enterprise

ATTEST TO Attachments of Certification:

Authorized Signature

**** NOT APPLICABLE ****

Typed Name

Date

Subscribed and sworn to before me this _____ day of _____ (month), 20__ in

_____ (city), _____ (county), _____ (state).

SEAL

Notary Public in and for _____ (County),
State of _____ Commission expires: _____

**ATTACHMENT X:
PROHIBITED TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT
CERTIFICATION**

This RFP and any resulting Contract is subject to the Public Law 115-232, Section 889, and 2 Code of Federal Regulations (CFR) Part 200, including §200.216 and §200.471, for prohibition on certain telecommunications and video surveillance or equipment.

Public Law 115-232, Section 889, identifies that restricted telecommunications and video surveillance equipment or services (e.g. phones, internet, video surveillance, cloud servers) include the following:

- A) Telecommunications equipment that is produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliates of such entities).
- B) Video surveillance and telecommunications equipment produced by Hytera Communications Corporations, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliates of such entities).
- C) Telecommunications or video surveillance services used by such entities or using such equipment.
- D) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, Director of the National Intelligence, or the Director of the Federal Bureau of Investigation reasonably believes to be an entity owned or controlled by the government of a covered foreign country.

The entity identified below, through its authorized representative, hereby certifies that no funds under this RFP or any resulting Contract will be obligated or expended to procure or obtain telecommunication or video surveillance services or equipment or systems that use covered telecommunications equipment or services as a substantial or essential component of any system, or as a critical technology as part of any system prohibited by 2 CFR §200.216 and §200.471, or applicable provisions in Public Law 115-232 Section 889.

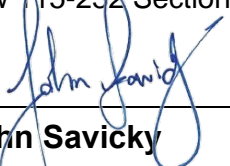
☒ The Respondent hereby certifies that it does comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.

SIGNATURE OF AUTHORIZED
PERSON:

NAME OF AUTHORIZED PERSON:

NAME OF COMPANY:

DATE:



John Savicky

Simplex Sourcing Solutions, LLC

11/30/21

-OR-

☐ The Respondent hereby certifies that it cannot comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.

SIGNATURE OF AUTHORIZED PERSON: _____

NAME OF AUTHORIZED PERSON: _____

NAME OF COMPANY: _____

DATE: _____

EXHIBIT A
Service Area Designation Forms

RFP 2021-083	Texas Service Area Designation or Identification				
Proposer Name:	Simplar Sourcing Solutions, LLC				
Notes:	Indicate in the appropriate box whether you are proposing to service the entire State of Texas				
	Will service the entire State of Texas	Will not service the entire State of Texas			
	YES - Service the entire State				
	If you are not proposing to service the entire State of Texas, designate on the form below the regions that you are proposing to provide goods and/or services to. By designating a region or regions, you are certifying that you are willing and able to provide the proposed goods and services.				
Item	Region	Metropolitan Statistical Areas	Designated Service Area		
1.	North Central Texas	16 counties in the Dallas-Fort Worth Metropolitan area	Yes		
2.	High Plains	Amarillo Lubbock	Yes		
3.	Northwest	Abilene Wichita Falls	Yes		
4.	Upper East	Longview Texarkana, TX-AR Metro Area Tyler	Yes		
5.	Southeast	Beaumont-Port Arthur	Yes		
6.	Gulf Coast	Houston-The Woodlands-Sugar Land	Yes		
7.	Central Texas	College Station-Bryan Killeen-Temple Waco	Yes		
8.	Capital Texas	Austin-Round Rock	Yes		
9.	Alamo	San Antonio-New Braunfels Victoria	Yes		
10.	South Texas	Brownsville-Harlingen Corpus Christi Laredo McAllen-Edinburg-Mission	Yes		
11.	West Texas	Midland Odessa San Angelo	Yes		
12.	Upper Rio Grande	El Paso	Yes		

RFP 2021-083	Nationwide Service Area Designation or Identification Form						
Proposer Name:	Simplar Sourcing Solutions, LLC						
Notes:	<p>Indicate in the appropriate box whether you are proposing to provide service to all Fifty (50) States.</p> <table border="1"> <tr> <td>Will service all Fifty (50) States</td> <td>Will not service Fifty (50) States</td> </tr> <tr> <td>YES - All States will be serviced</td> <td></td> </tr> </table> <p>If you are not proposing to service to all Fifty (50) States, then designate on the form below the States that you will provide service to. By designating a State or States, you are certifying that you are willing and able to provide the proposed goods and services in those States.</p> <p>If you are only proposing to service a specific region, metropolitan statistical area (MSA), or city in a State, then indicate as such in the appropriate column box.</p>			Will service all Fifty (50) States	Will not service Fifty (50) States	YES - All States will be serviced	
Will service all Fifty (50) States	Will not service Fifty (50) States						
YES - All States will be serviced							
Item	State	Region/MSA/City	Designated as a Service Area				
1.	Alabama						
2.	Alaska						
3.	Arizona						
4.	Arkansas						
5.	California						
6.	Colorado						
7.	Connecticut						
8.	Delaware						
9.	Florida						
10.	Georgia						
11.	Hawaii						
12.	Idaho						
13.	Illinois						
14.	Indiana						
15.	Iowa						
16.	Kansas						
17.	Kentucky						
18.	Louisiana						
19.	Maine						

20.	Maryland		
21.	Massachusetts		
22.	Michigan		
23.	Minnesota		
24.	Mississippi		
25.	Missouri		
26.	Montana		
27.	Nebraska		
28.	Nevada		
29.	New Hampshire		
30.	New Jersey		
31.	New Mexico		
32.	New York		
33.	North Carolina		
34.	North Dakota		
35.	Ohio		
36.	Oregon		
37.	Oklahoma		
38.	Pennsylvania		
39.	Rhode Island		
40.	South Carolina		
41.	South Dakota		
42.	Tennessee		
43.	Texas		
44.	Utah		
45.	Vermont		
46.	Virginia		
47.	Washington		
48.	West Virginia		
49.	Wisconsin		
50.	Wyoming		

EXHIBIT B

Description of Deliverable Topics

The Respondent should provide a response as to how the individual or firm would supplement existing procurement personnel to assist SHARE Members in procuring desired goods and/or services. A quality response will detail the individual's or firm's capabilities and knowledge related to the following procurement areas that could constitute services desired by a Public Sector Procurement Consultant.

The following selection is **not all-encompassing**, and knowledge and experience related to additional procurement areas are desired.

A. Competitive Procurement Process:

- Procurement Need Identification / Procurement Data Collection
- Procurement Method Selection
- Procurement Schedule Development/Procurement Planning
- Solicitation Document Development
- Solicitation Document Issuance
- Bid/Proposal Evaluation
- Negotiations (if applicable)
- Contract Formation & Award

B. Request for Proposal (RFP): The method used to solicit proposals from potential providers (proposers) for goods and services. Price is usually not a primary evaluation factor. Provides for the negotiation of all terms, including price, prior to contract award. May include a provision for the negotiation of best and final offers.

C. Request for Information (RFI): A non-binding method whereby a jurisdiction publishes via newspaper, Internet, or direct mail its need for input from interested parties for an upcoming solicitation. A procurement practice used to obtain comments, feedback, or reactions from potential responders (suppliers, contractors) prior to the issuing of a solicitation. Generally, price or cost is not required. Feedback may include best practices, industry standards, technology issues, etc.

D. Request for Statement of Qualifications (RFSQ): The method used by a procurement entity to obtain statements of the qualifications of potential responders (development teams or consultants) to gauge potential competition in the marketplace, prior to issuing the solicitation.

E. Market Research: Collecting and analyzing information about capabilities within the market to satisfy agency needs. The results of market research are used to arrive at the most suitable approach to acquiring, distributing, and supporting goods and services.

F. Specification Development: Assist in the development and preparation of effective, concise, and open technical requirements for the material, product, or service to be procured. There are several types of specifications that are commonly used. The names may vary by the source describing them, but the following are the most commonly used terms. A single specification may be a combination of two or more of these types.

- Design specifications
- Performance specifications
- Combination specifications
- Brand name specifications
- Brand name or equal specifications
- Qualified products list specifications
- Standard specifications

G. Statutory Interpretation and Compliance:

- Interlocal Cooperation Act, Texas Government Code Chapter 791
- Purchasing and Contracting Authority of Municipalities, Texas Local Government Code Chapter 252.
- Contracting and Delivery Procedures for Construction Projects, Texas Government Code Chapter 2269
- General Rules and Procedures, Texas Government Code Chapter 2155
- Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, 2 CFR Part 200
- All applicable State and Federal Procurement Regulations

H. Disadvantaged Business Enterprise (DBE) Programs

I. Procurement of Goods and Services with Federal Grants

J. Procurement of Construction Related Services

K. Competitive Solicitation Process Exemptions:

- State Procurement Exemptions
- Federal Procurement Exemptions

L. Cooperative Procurement (Purchasing): The action taken when two or more entities combine their requirements to obtain advantages of volume purchases, including administrative savings and other benefits.

2. A variety of arrangements, whereby two or more public procurement entities purchase from the same supplier or multiple suppliers using a single Invitation for Bids (IFB) or Request for Proposals (RFP). 3.

Cooperative procurement efforts may result in contracts that other entities may “piggyback.”

- **Common Cooperative Purchasing Programs:**

- BuyBoard National Purchasing Cooperative
- The Interlocal Purchasing System (TIPS)
- Sourcewell
- OMNIA Partners, Inc.
- Choice Partners National Purchasing Cooperative
- Houston-Galveston Area Council (H-GAC) Cooperative Purchasing Program
- State of Texas Cooperative Purchasing Program (Texas SmartBuy)
- General Services Administration (GSA) Cooperative Purchasing Program

M. Public Procurement Negotiation: A process of planning, reviewing, analyzing, and conferring used by two or more parties to reach a mutually acceptable agreement in a contracting relationship.

EXHIBIT C
Pricing Proposal (Individual Consultant)

**** NOT APPLICABLE ****

The Respondent shall furnish a unit rate for its services. Please provide a unit rate for services described in the Scope of Work and attach it to your submission. Include any other cost categories that should be considered within the “other” category. Attach extra sheets, as necessary. Respondents are encouraged to offer additional Public Sector Procurement Consulting functions and services as options for retainer under this solicitation. All rates should be presented as fully loaded hourly rates.

Pricing Format Request Example Individual Consultant		Procurement No.:	NCT 2021-083
Respondent Name:			
Notes:	1. This pricing sheet is an EXAMPLE of how pricing should be submitted for RFP 2021-083 2. Please provide hourly rate for Public Sector Procurement Consulting Services 3. Detail any additional information necessary. 4. Proposers are encouraged to offer additional Public Sector Procurement Consulting functions or services to be offered as fully loaded hourly rates. Additional services that you can provide should be included with this response.		
Public Sector Procurement Consulting Services Rate Chart - SHARE Cooperative Purchasing Program			
Item	Description	Offered Price	
1	Individual Consultant	Specify Rate (Hourly)	
2	Other, Miscellaneous, Etc.	Specify Rate (Hourly, Daily, Weekly)	
3	Other, Miscellaneous, Etc.	Specify Rate (Hourly, Daily, Weekly)	
Contractor shall provide additional Public Sector Procurement Consulting goods or services at hourly rate:		%	

**** NOT APPLICABLE ****

EXHIBIT D
Pricing Proposal (Firm/Organization)

**** NOT APPLICABLE ****

Respondents are to provide a rate chart for the labor categories/ skill sets outlined below. All rates should be presented as fully loaded hourly rates. Include any other cost categories that should be considered within the "other" category. Attach extra sheets, as necessary. Respondents are encouraged to offer additional Public Sector Procurement Consulting functions and services as options for retainer under this solicitation.

Pricing Format Request Example		Procurement No.:	NCT 2021-083
Respondent Name:			
Notes:	1. This pricing sheet is an EXAMPLE of how pricing should be submitted for RFP 2021-083 2. Please provide hourly rates for all staff that would be involved in Procurement related projects. 3. Use as many lines as needed. 4. Detail any additional information necessary. 5. Proposers are encouraged to offer additional Public Sector Procurement Consulting functions or services to be offered as a catalog option. Please provide any additional options with 'list less' or 'cost plus percentages for pricing. A copy of any catalog services your firm can provide should be included with this response.		
Public Sector Procurement Consulting Services Rate Chart - SHARE Cooperative Purchasing Program			
Item	Description	Offered Price	
1	Position Title	Specify Rate (Hourly)	
2	Position Title	Specify Rate (Hourly)	
3	Position Title	Specify Rate (Hourly)	
4	Position Title	Specify Rate (Hourly)	
5	Position Title	Specify Rate (Hourly)	
6	Position Title	Specify Rate (Hourly)	
7	Other, Miscellaneous, Etc.	Specify Rate (Hourly, Daily, Weekly)	
8	Other, Miscellaneous, Etc.	Specify Rate (Hourly, Daily, Weekly)	
Contractor shall provide additional Public Sector Procurement Consulting goods or services at cost plus:		%	

**** Please see Tab F for our Pricing ****



**ADDENDUM TO THE
REQUEST FOR PROPOSALS
North Central Texas Council of Governments
Public Sector Procurement Consulting Services**

ADDENDUM NO. 1

DATE ISSUED: November 4, 2021

**REQUEST FOR PROPOSALS NUMBER: NCT-2021-083
ORIGINAL RFP SUBMISSION DATE: November 23, 2021
REVISED RFP SUBMISSION DATE: December 2, 2021**

RFP NCT-2021-043, dated October 25, 2021, is hereby amended to incorporate in full text the following provisions:

The solicitation schedule for this RFP has herby been amended as follows:

Section 3.5 Solicitation Schedule:

RFP Issued	October 25, 2021	
Pre-Proposal Conference	November 10, 2021	2:00 PM CST
Inquiry Period Ends	November 23, 2021	5:00 PM CST
Proposal Due Date	December 2, 2021	2:00 PM CST
Executive Board Meeting	January 2021	
Anticipated Start Date	January 2021	

Brent Moll
Buyer II

Proposers: Please acknowledge and return a copy of this Addendum with your proposal.

COMPANY NAME: Simplar Sourcing Solutions LLC

SIGNATURE: 

NOTE: Company name and signature must be the same as on the RFP documents.



**ADDENDUM TO THE
REQUEST FOR PROPOSALS
North Central Texas Council of Governments
Public Sector Procurement Consulting Services**

ADDENDUM NO. 2

DATE ISSUED: November 10, 2021

**REQUEST FOR PROPOSALS NUMBER: NCT-2021-083
ORIGINAL RFP SUBMISSION DATE: November 23, 2021
REVISED RFP SUBMISSION DATE: December 2, 2021**

RFP NCT-2021-083, dated October 25, 2021, is hereby amended to incorporate in full text the following provisions:

- **Section 7.0: Instructions for Respondents**
To eliminate confusion, NCTCOG/SHARE has elected to remove the following question from Section 7.0 Tab D, Technical Proposal: *Can you provide references for procurement projects similar to ours?*
- **Attachment VI Certification Regarding Disclosure of Conflict of Interest**
Remove Attachment VI Certification Regarding Disclosure of Conflict of Interest, Conflict of Interest Questionnaire and replace with the attached Conflict of Interest Questionnaire (REVISED) included in this Addendum #2.

Brent Moll
Buyer II

Proposers: Please acknowledge and return a copy of this Addendum with your proposal.

COMPANY NAME: Simple Sourcing Solutions LLC

SIGNATURE: 

NOTE: Company name and signature must be the same as on the RFP documents.

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

FORM CIQ

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.

2 ☐ Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐

Yes

☐

No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐

Yes

☐

No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

Signature of vendor doing business with the governmental entity

Date



**ADDENDUM TO THE
REQUEST FOR PROPOSALS
North Central Texas Council of Governments
Public Sector Procurement Consulting Services**

ADDENDUM NO. 3

DATE ISSUED: November 28, 2021

**REQUEST FOR PROPOSALS NUMBER: NCT-2021-083
ORIGINAL RFP SUBMISSION DATE: November 23, 2021
REVISED RFP SUBMISSION DATE: December 2, 2021 (Revised)**

RFP NCT-2021-083, dated October 25, 2021, is hereby amended to incorporate in full text the following provisions:

The following questions were submitted by potential proposers and are answered below. Questions are indicated by standard type and answers indicated by **bold-face type**.

Question #1

Please provide examples of products, resources or services that the North Central Texas Council of Governments (and/or its member jurisdictions) intends to procure, utilizing the services offered by the selected Procurement Consultant. For example, information technology, architecture and engineering services, design, construction, other professional services, etc.

Answer 1: Be advised that this project is being solicited with the intent of being made available as a cooperative contract. Also known as an interlocal contract, any agreements retained under this project are intended to be accessible for use by any public sector agency, municipal and local government, school districts, etc.

These agencies could access an awarded vendor's services under this project without having to perform a procurement project of their own. Awarded vendors would have the freedom to approach public sector entities and notify them that their public sector procurement consulting services could be had without requiring a potential client to perform an RFP of their own.

As such, there are no limitations to the types of procurements that an awarded contractor could be requested to perform.

Question #2

Are there any page limits for our proposal response for each required Tab?

Answer 2: NCTCOG/SHARE does not intend to limit the respondent's ability to sufficiently describe their capabilities; therefore, the length of a respondent's proposal is not restricted.

Question #3

Tab D Requirements: Tab D requests that we respond to all of the tasks/activities outlined in Section 5, Section 7, and Exhibit B. Currently, these sections outline and identify over 48+ topics. To clarify, does NCTCOG really want us to address each one of these items in Tab D? If so, this could result in a document that is over 150 pages. Would a document of that size be reasonable for an Evaluator to read/score? Or can the NCTCOG limit the topics (i.e. identify the top 10 items) that they would like us to address in this Tab? This would make the Tab more reasonable to review by evaluators.

Answer 3: NCTCOG/SHARE does not expect for a respondent to individually address each task/topic identified in Section 5, Section 7, and Exhibit B. A.3) Instead, Respondents are asked to submit a detailed but focused response that demonstrates the Respondent's capabilities and how the Respondent would support SHARE Members in achieving their procurement objectives. A quality response will identify specific skill sets, as well as a range of knowledge pertaining to tasks and procurement areas that could constitute services desired by a Public Sector Procurement Consultant.

Question #4

Section 5.0 Samples: Section 5.0 states: "Respondents are asked to provide examples of previous efforts and/or project history that attest to specific skillsets/range of knowledge for the tasks listed above." To submit complete examples of RFP's, ITB, RFSQ, etc., would make this submittal enormous (each one of these documents can range from 20-100 pages each). Is the intent for us to submit examples of each of the procurement types identified in section 5.0, or are we not interpreting this requirement correctly?

Answer 4: NCTCOG/SHARE does not expect respondents to provide full examples of past completed procurements. Instead, a sample of a completed product is desired, but the entire work product is not necessary.

All documents associated with the proposal submitted, unless the respondent indicates a portion of the proposal is proprietary, may be subject to public inspection in accordance with the Public Information Act.

Question #5

Section 7.0 Samples: Section 7.0 states: "Can you provide references for procurement projects similar to ours?" Could you clarify what "similar" means? Does this mean Public Organizations or is there a specific type of procurement or project reference you are looking for.

Answer 5: To clarify, NCTCOG/SHARE requests that Respondents provide references for procurement projects for public-sector entities. For example:

- A county
- An incorporated city, municipality, town, or village
- An Authority, district or other political subdivision of the state
- A non-profit organization providing governmental services

Question #6

Section 7.0 Samples: Section 7.0 states: "What services do you provide throughout the process?" Could you clarify what "process" means? Is this a general reference to procurement as a whole, or are you asking about a specific part of the procurement process?

Answer 6: The purpose of this question is to elicit a response from the Respondent that identifies the types of services that the respondent intends to offer throughout the entire formal procurement (Request for Proposals/RFP) process.

Question #7

Section 7.0 Samples: Section 7.0 states: "How will you involve our team and business in the RFP process?" Could you clarify what role NCTCOG expects to play in this process? In reading the scope, it is our understanding that we would act as a procurement/purchasing agent for one of NCTCOG's 236 members. We would not expect NCTCOG to be involved in any part of the actual RFP process unless NCTCOG has expectations of what they would like to do. Could you clarify if we understand the scope correctly?

Answer 7: NCTCOG/SHARE does not anticipate involvement in a SHARE Member's project, but NCTCOG may independently secure the services of an awarded contractor(s) for our own procurement related projects; if desired

Question #8

To clarify, are proposals to be submitted electronically online (via www.PublicPurchase.com), or via hardcopy/mail (or both)?

Answer 8: All proposals must be submitted electronically via Public Purchase.

Question #9

Section 2.3 states that we are responsible for paying NCTCOG 2% of each contract that we are awarded. Will this be accounted for separately in the work that is awarded, or are we required to adjust our current hourly rates to include the 2% in our rates (and provide that in Tab F / Exhibit D)

Answer 9: Awarded vendors are contacted quarterly to provide their services report. 2% of all sales resultant from the program are expected at this same time via check or automated clearing house (ACH) payments. Failure to report on services rendered, or modification of the report information will result in immediate termination of the contract, prohibition from ever holding a SHARE contract again, and potential legal action being taken. Projects that were funded with grant funds will also result in the vendor being reported to Federal contracts management agency SAM.gov.

Question #10

6.04 States that we must maintain "minimum insurance coverage". What exactly does this mean?

Answer 10: SHARE is a National Public Sector cooperative purchasing program which allows any public entity or non-profit use of a SHARE contract and its selected vendor(s) and pricing to pursue their own projects. As such, depending on the location of the SHARE Entity, different State requirements may be applicable.

For the purpose of streamlining responses to the insurance requirements outlined in Section 6, please use the North Central Texas Council of Governments' minimum insurance requirements listed below as a benchmark.

Workers' Compensation: Coverage and limits as required by law

Commercial General Liability:

f. Minimum Required Limits:

\$1,000,000 per occurrence;

\$3,000,000 General Aggregate

g. Commercial General Liability policy shall include:

vi. Coverage A: Bodily injury and property damage;

vii. Coverage B: Personal and Advertising Injury liability;

viii. Coverage C: Medical payments

ix. Products: Completed operations

x. Fire Legal Liability

h. Policy coverage must be on an "occurrence" basis using CGL forms as approved by the Texas State Board of Insurance

i. Attachment of Endorsement CG 20 10- additional insured

j. All other endorsements shall require prior approval by the NCTCOG.

Comprehensive Automobile/Truck Liability: Coverage shall be provided for all owned hired, and non-owned vehicles. Minimum Required Limit: \$1,000,000 combined single limit.

Professional liability:

a. Minimum Required Limits:

\$1,000,000 Each Claim

\$1,000,000 Policy Aggregate

If you have any exceptions to any of our terms and conditions or clauses contained in this RFP, please state your exceptions in your response.

Question #11

Tab A requests: "A brief statement of the respondent's understanding of the work to be done and a summary of its qualifications".

Tab B requests: "briefly describe the approach and clearly indicate any options or alternatives being proposed"

It appears that these two tabs are requesting very similar information. Is this correct? Should we duplicate the exact same information in both tabs?

Answer 11: The information requested in Tab A and Tab B may be similar, but in order to be deemed responsive by NCTCOG Purchasing, as well as to receive the maximum points allotted, respondents must respond to each tab separately.

Failure to do so may result in your proposal being deemed non-responsive and being removed from consideration.

Tab A: The intent of Tab A is to determine whether or not the respondent has a clear understanding of the requirements for RFP 2021-083 Public Sector Consulting Services.

Tab B: The intent of Tab B is to afford respondents the opportunity to briefly describe how they propose to provide the desired services for SHARE members. Tab B also affords respondents the opportunity to identify any alternative methods to providing the requested services, as well as to identify upfront any of the RFP requirements that they cannot currently meet.

Question #12

30% weight has been assigned to the Cost Proposal (Tab F). How exactly will this be assessed? For example, will NCTCOG simply average all of our hourly rates (that we provide on Exhibit D) and compare that amongst the Respondents?

Answer 12: Pricing Proposal: Scores are calculated using the ratio method. The Respondent with the lowest average combined hourly rate receives the maximum points. All other proposals receive a percentage of the points available based on their average combined hourly rate relationship to the lowest.

Lowest average combined hourly rate X maximum points available = awarded points
Evaluated average combined hourly rate

Question #13

Exhibit D requests "Contractor shall provide additional Public Sector Procurement Consulting goods or services at cost plus". What exactly does this mean?

Answer 13: The purpose of this language is to reserve the contractor's right to offer additional products or services not anticipated by this RFP at a cost-plus percentage.

If a respondent were to provide a cost-plus percentage for additional services, then those services are considered captured for the term of a resultant contract, therefore allowing items that are not on the pricing proposal at the time of submission, to be added at a

later date, and subject to the same cost-plus pricing discount referenced in the RFP response.

Question #14

In Section 7.0 (item "Tab C"), it states that we must provide email and phone numbers for each of staff members. Could we provide this information prior to award versus submitting it in our proposal?

Answer 14: All requested information must be presented together at the time of submission.

All documents associated with the proposal submitted, unless the respondent indicates a portion of the proposal is proprietary, may be subject to public inspection in accordance with the Public Information Act.

Question #15

Thanks for the responses. As a follow to Question 14. Since all information can be made public (in accordance with Public Information Act), could we provide a generic phone number to our office/company, versus providing personal phone numbers of our key staff? Once this is made public, we do not want to share our staff's cell phone numbers.

Answer 15: A generic phone number for your office/company is acceptable.

Question #16

Tab E requires us to "Include at least three references for whom you have provided similar services."

However, in Tab D, it requests that we "provide references for procurement projects similar to ours". (see Section 7.0).

It appears that part of Tab D is asking for same information that we will be providing in Tab E. Is this correct? If yes, then is there a difference between what you are looking for in the reference information?

Answer 16: Submitting at least three recent references for relevant past procurement related projects that are in similar scope or nature (preferably public agencies) will suffice.

Question #17

We have years of experience providing Procurement and Planning services to many states, county, and city agencies and has never seen these certification requirements. Will you consider years of experience as equivalent to the required certification(s)?

Answer 17: The Universal Public Procurement Certification Council (UPPCC) certifications Certified Professional Public Buyers (CPPB) and Certified Public Procurement Officers (CPPO) outlined in Section 5.1 are not a requirement. The CPPB and CPPO certify public procurement professionals against established standards of competency.

If a respondent were to submit one or both certifications as means to demonstrate qualification/competency, then the Respondent must provide verifiable documentation.

Question #18

If we utilize a HUB as a partner, will we be awarded the 5 points in the HUB status?

Answer 18: The primary responding firm is the *ONLY* firm that will be considered for HUB/M/WBE points. Subcontractors of the primary firm will not be awarded HUB/M/WBE points.

All HUB/MBE/DBE/WBE certifications will be scrutinized and verified for authenticity and points will be awarded for those that are determined to be legitimate.

Question #19

Please clarify if we need to repeat in our proposal the RFP language for each item in Section 5 Specifications and then respond to each, even just to acknowledge that we've read and understood the item?

Answer 19: NCTCOG encourages proposers to be creative when developing their proposals; therefore, it is at their discretion to determine the best method to address each item in Section 5: Specifications. A quality response will demonstrate the individual's or firm's capabilities and knowledge related to the typical tasks and types of procurements associated with the services requested.

Question #20

Please clarify if we need to repeat in our proposal the RFP language for each item in Exhibit B Description of Deliverable Topics and then respond to each, even just to acknowledge that we've read and understood the item, especially those that seem to just informational?

Answer 20: NCTCOG encourages proposers to be creative when developing their proposals; therefore, it is at their discretion to determine the best method to address each item. A quality response will detail the individual's or firm's capabilities and knowledge related to the items listed in Exhibit B: Description of Deliverable Topics.

Question #21

Please provide a fillable Conflict of Interest Questionnaire form.

Answer 21: NCTCOG does not have a form fillable Conflict of Interest Questionnaire.

Question #22

Do we need to complete and include in our proposal the Conflict-of-Interest Questionnaire?

Answer 22: Yes.

Question #23

Please clarify whether Exhibit B, Description of Deliverable Topics, need to addressed within Tab D, Technical Proposal, and not as a separate exhibit.

Answer 23: Exhibit B, Description of Deliverable Topics should be addressed within Tab D, Technical Proposal.

Question #24

In which TAB do completed and signed addendum forms need to be included?

Answer 24: NCTCOG has not designated a specific Tab for the addendum forms. Including completed and signed addendum forms in one's submission will suffice. There is a designated area on the cover sheet, page 1 of the RFP document, for respondents to acknowledge any addenda. This page is submitted in Tab A of the proposal.

Question #25

Please provide a PDF copy of the Conflict of Interest Questionnaire. The one included in the RFP is an image.

Answer 25: Please see addendum #2.

Question #26

Is NCTCOG interested in the response to include a security as a service?

Answer 26: The primary intent of RFP 2021-083 is to receive proposals resulting in the retainer of services and the selection of a vendor(s) to provide Public Procurement Consulting Services as part of the SHARE Cooperative Purchasing Program. Respondents are encouraged to include any additional pertinent information on how their proposed solution will meet this requirement. Respondents are also encouraged to provide any pertinent additional functionality and/or services not outlined in the Scope of Work that they wish to offer.

Question #27

Is NCTCOG interested in the response to include a data analytics?

Answer 27: The primary intent of RFP 2021-083 is to receive proposals resulting in the retainer of services and the selection of a vendor(s) to provide Public Procurement Consulting Services as part of the SHARE Cooperative Purchasing Program. Respondents are encouraged to include any additional pertinent information on how their proposed solution will meet this requirement. Respondents are also encouraged to provide any pertinent additional functionality and/or services not outlined in the Scope of Work that they wish to offer.

Question #28

How many awardees are estimated to be given from this RFP?

Answer 28: If multiple respondents satisfactorily meet the requirements of the RFP, then there is the potential to award to multiple vendors. Following the receipt of proposals, the RFP 2021-083 Evaluation Committee will evaluate all submitted proposals to determine the number of awardees.

Question #29

What is the current workload this may augment?

Answer 29: Any contract(s) resulting from this RFP will be made available to all public sector agencies that desire to use them. As such, NCTCOG/SHARE would not be able to estimate the current workload for potential users. The potential business opportunities for an awarded vendor are limited only by their own outreach and marketing capabilities.

Question #30

Will you provide the recording of the pre-bid conference?

Answer 30: The RFP 2021-083 Pre-Bid Conference recording along with any other procurement related documents will be made available via a public information request upon completion of the procurement process and the authorization from NCTCOG's Executive Board to enter into a Master Services Agreement (MSA) with the selected awardee(s).

In addition, NCTCOG/SHARE would like to note that there were no substantive questions or new information discussed in the meeting that resulted in an addendum apart from addendum #2.

Question #31

NCTCOG RFP pg. 17 Tab E references - NCTCOG asks us to include three recent references. Are clients that we worked with in the last 5 years, considered recent?

Answer 31: Yes

Question #32

NCTCOG RFP pg. 8 Section 5: scope of work. Can you provide examples of what type of scope/projects/services that NCTCOG may expect to develop over the next 3 years (e.g. software selections, IT outsourcing/services, etc.)? Are there any upcoming projects/procurements that NCTCOG is aware of?

Answer 32: Be advised that this project is being solicited with the intent of being made available as a cooperative contract, as such, SHARE would not be able to define the types of procurement related projects that an awarded vendor could perform on behalf of a SHARE member.

Question #33

Section 5.2 Contract Type says a copy of, or link to, the vendor's rate chart must be submitted with the Proposal. I am an individual and do not have a rate chart beyond what I will submit on Exhibit C. Would not providing a separate rate chart disqualify me?

Answer 33: No, it will not. respondents proposing as an individual are not required to submit a rate chart if one is not available.

Question #34

Under Exhibit B: Tabs H, I J, and K. Please clarify the expected deliverables.

Answer 34: NCTCOG/SHARE encourages proposers to be creative when developing their proposals; therefore, it is at your discretion to determine the best method to address each item. A quality response will detail the individual's or firm's capabilities and knowledge related to the items listed in Exhibit B: Tabs H, I J, and K.

Question #35

Given we are a business, with 20 consultant team members, are you asking us to provide you evidence of the certification document for each of our 20 team members?

Answer 35: If the intent is to use certifications as means to demonstrate qualification/competency, then verifiable documentation must be provided.

Ultimately, it is the responsibility of each respondent to furnish whatever information about their firm as they deem necessary to demonstrate qualifications/competencies of their consultants.

Question #36

Given we are a business, the deliverables under our client engagements are property of the client. We would require authorization from our client to share these documents. Are you asking for us to provide actual RFPs or IFBs, as well as project reports, done by any one of our individual consultants? This will prove to be challenging as well as time consuming, in addition to those documents being confidential. Please advise.

Answer 36: NCTCOG/SHARE does not expect respondents to provide full examples of past completed procurements. Instead, a sample of a completed product is desired, but the entire work product is not necessary.

All documents associated with the proposal submitted, unless the respondent indicates a portion of the proposal is proprietary, may be subject to public inspection in accordance with the Public Information Act.

Question #37

Please confirm the number of addenda issued as of 11/23. When clicking on the link to Addendum 2 (Conflict of Interest pdf), the website displays Addendum 3 in the title.

Answer 37: The number of addenda issued as of 11/23 is two (2).

Question #38

The Cover Sheet (pg 1 of the Solicitation Document) does not appear to have been revised to reflect the submission date change. Will an addendum be issued or should we mark-up the provided version?

Answer 38: The purpose of RFP 2021-083 Addendum #1 was to revise Section 3.5: Solicitation Schedule; therefore, the cover sheet of the solicitation document does not need to be modified and should be completed as required.

Question #39

Is the certification number and expiration date considered verifiable documentation for CPPO/PPB/PMP, etc?

Answer 39: Yes

Question #40

Under Exhibit B: Tabs H, I, J, and K. Please clarify the expected deliverables. Are these items expected to be requirements in the procurements we would be assisting our clients in developing? For example, section H, is the deliverable to include this as a requirement in the procurement we would be assisting in developing or is the deliverable to create a DBE program or would we need to partner with a DBE to perform the work requested?

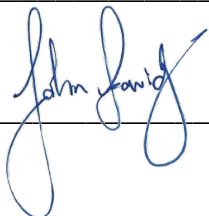
Answer 40: All services requested could be desired by potential SHARE clients, therefore providers should be able to provide each of them, if so desired.

Brent Moll
Buyer II

Proposers: Please acknowledge and return a copy of this Addendum with your proposal.

COMPANY NAME: Simplar Sourcing Solutions LLC

SIGNATURE: _____

A handwritten signature in blue ink, appearing to read "John Farley", is written over a horizontal line.

NOTE: Company name and signature must be the same as on the RFP documents.