

NIGP Consulting

Powered by **Periscope**

RESPONSE TO RFP 2021 - 083
PUBLIC SECTOR PROCUREMENT CONSULTING SERVICES
FOR



North Central Texas
Council of Governments

Texas
SHARE
Your Public Sector Solutions Center



Submitted by:
NIGP Consulting
(powered by Periscope)
Submitted: 12/02/21
Periscope Holdings Inc.
5000 Plaza on the Lake, Suite 100
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TAB A – COVER SHEET

NIGP Consulting, powered by Periscope Holdings Inc, is pleased to submit this Proposal in response to the North Central Texas Council of Governments (“NCTCOG”) RFP#2021-083, for the provision of Public Sector Procurement Consulting Services. Today’s public sector leaders are faced with unprecedented challenges in their procurement function. Whether addressing the pandemic emergency in their communities, struggling to resolve supply chain disruptions for critical goods and services, or managing resources in their entities to support their internal and external clients needs, today’s public sector professionals need professional support for their procurement needs. If the past two years have demonstrated anything, they have shown political and executive leaders how important a well-staffed, well-developed and well-prepared procurement operation is to the communities they serve. Procurement has been pushed to the forefront as a key player in supporting, building and maintaining healthy communities. With that new focus and new spotlight come incredible pressures to perform, to be responsive to entity needs and to be flexible and adaptable to the pace of change. The cooperative contracting opportunity provided by NCTCOG and SHARE creates a tremendous value to the procurement community. With the right partnership, NCTCOG and SHARE will have the ability to provide an immediate tool and solution to their procurement peers and government entities requiring support as they maneuver the challenges of public sector service.

With over 26 years of experience and with over 100 public sector clients, NIGP Consulting is the **leader** in public sector procurement consulting. NIGP Consulting brings over 500 years of public sector experience and expertise with our team of uniquely and highly-qualified consulting professionals. Our team represents current and former public sector practitioners, each with an average of 25 years of experience, who work or have worked for every type of government entity. They are Chief Procurement Officials, procurement executives, procurement managers and procurement professionals extensively experienced in industry best practices, professionally certified in their craft of public sector procurement, and they are some of the most well-known practitioners and procurement leaders in the industry. They are the professionals who are transforming public procurement, who are training and developing procurement staff, who are supporting the needs of their clients, and who are leading the procurement functions in communities around North America.

Our clients range from states, cities, counties, universities, school districts, special districts and airports from all over North America. Based upon the breadth and depth of our experience and expertise, we proudly serve all public sectors across all 50 states, as well as providing service in Canada. We are **unmatched** in our service to public sector clients. In short, we are **PROCUREMENT PROFESSIONALS ADVANCING, SUPPORTING AND TRANSFORMING PROCUREMENT IN THE PUBLIC SECTOR!**

You will find our proposal offering to be in complete alignment with the intent of the SHARE Cooperative Purchasing Program, bringing value to the public sector through procurement services. Our sole clients and our sole purpose are to support the public sector with any and all of their procurement services and support needs. We fully understand and support the cooperative procurement approach to assisting public sector in expediting their sourcing needs by providing a “Go To” contracting vehicle to meeting their service needs. We have extensive experience working with cooperative contracts, we are leaders in the public procurement community, and we have an extensive network of contacts throughout the procurement community.

We are ready to serve as collaborative partners with NCTCOG and SHARE to serve the public sector. We are excited about this opportunity!



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.

Periscope Holdings Inc

Legal Name of Proposing Firm

Marcheta Gillespie

Contact Person

President of NIGP Code & Consulting

Title

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Acknowledgment of Addenda: #1 CJK #2 CJK #3 CJK #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.

Christopher Kennedy

Authorized Signature

TAB B – EXECUTIVE SUMMARY

NIGP Consulting has been supporting and transforming public sector procurement for over 25 years. Our services include project specific engagements, such as Strategic Procurement Assessments, as well as advisory and staff support services. Uniquely positioned in the industry, NIGP is THE consulting program of NIGP, the Institute for Public Procurement, managed exclusively by Periscope Holdings Inc.

NIGP Consulting has read and fully complies with all requirements of the RFP. With our extensive experience in cooperative procurement, we know how to leverage the value of a cooperative contract in the public procurement community. We ARE public procurement, so our reach into the public sector is extensive. Our team of consultants are current and former procurement practitioners who have contacts throughout North America. We have relationships with government political, executive and procurement leaders, as well as procurement staff in entities of all types and in all locations throughout the US and Canada. With this extensive network of relationships, we have immediate access to the decision makers and policy makers who would have interest in leveraging a cooperative contract to support their procurement service needs. Given our program leadership is actively engaged in the procurement community giving presentations, engaging regularly in social media and providing regular content for public procurement, NIGP Consulting has a consistent and high-profile presence in the procurement community.

As current and former procurement practitioners, we are well versed in how to market a cooperative contract to the government sector. And, because we are actively engaged in the public procurement sector on a daily basis, we are interacting with procurement professionals and entity leaders who are sharing challenges and opportunities on a regular basis. This allows us to work collaboratively with NCTCOG and SHARE to create awareness of this contracting tool and increase use of the cooperative tool well beyond the boundaries of the Texas community. All the while, we are able to ensure a focus on the Texas and SHARE community, to address their needs.

While the focus of this RFP is to provide staff support, one of the objectives of NIGP Consulting is to transform procurement entities around North America. To provide communities the support they need, public sector procurement must learn to adapt to the changing needs of society, government and community, to serve the community at increasingly higher levels of support and service. NIGP Consulting supports government, by providing the expertise, the insight and the skill to facilitate transformation of the procurement function. Our portfolio of services demonstrates the breadth and depth of our services, and how they complement the needs of the SHARE cooperative. Through a full range of service offerings, the SHARE cooperative will be the GO-TO cooperative contract across North America for procurement consulting services.

Client Engagement

As a contracted partner with NCTCOG and SHARE, NIGP Consulting will be committed to meeting the needs of the SHARE community. NIGP Consulting will stand ready to receive inquiries for support services, through immediate connection to our President of NIGP Code and Consulting, Marcheta Gillespie. Marcheta is a dedicated, full-time resources for the NIGP Consulting Program, focused exclusively on engaging and connecting potential clients to procurement solutions offered by NIGP Consulting under this contract. Working directly with over twenty procurement professional consultants on a daily basis, Marcheta has access to the top procurement professionals in the US and Canada. Alongside her team, Marcheta is able to match needs with optimal solutions.

NIGP Consulting is regularly contacted by the public sector. Our inquiries come from political leadership, executive leadership and procurement staff throughout North America. Often, the services of interest exceed the competitive threshold of the inquiring entity. With a cooperative contract tool, NIGP Consulting will be able to guide potential clients to the SHARE cooperative as a manner of immediate engagement.

TAB C –Key Personnel and Experience

KEY PERSONNEL

Program Manager/Primary Point of Contact

Marcheta E. Gillespie, FNIGP, CPPO, C.P.M., CPPB, CPM

President of NIGP Code & Consulting

mgillespie@nigp.com/mgillespie@periscopeholdings.com

(520)940-7194

Marcheta E. Gillespie, FNIGP, CPPO, NIGP-CPP, CPPB, C.P.M., CPM, is President of NIGP Code & Consulting. She is a dynamic international speaker, trainer, content developer, consultant, mentor and experienced procurement leader with over 30 years in the procurement profession. As the former Chief Procurement Official for the City of Tucson's Department of Procurement, Marcheta had over 27 years of experience in one of the country's largest, most highly acclaimed procurement organizations. Retired from government service, Marcheta now shares her extensive experience and expertise with public and private industry through numerous roles in the industry. Marcheta has provided professional consulting services to over a dozen government agencies, including states, cities, counties, universities, special districts and airports throughout North America.

As a passionate advocate for the procurement profession, Marcheta possesses a broad and deep range of expertise in numerous areas of public procurement best practices, professional development and leadership. Marcheta is the 2019 Albert H Hall recipient and the 2017 Distinguished Service Award recipient, the highest and second highest honors bestowed upon individuals by NIGP in the public procurement profession. Marcheta is a former Chair of the UPPCC Governing Board, was the 2013-2014 President of NIGP and served on the NIGP Board of Directors for 10 years.

Marcheta provides extensive training in the profession and also develops content curriculum for the industry. She has chaired several historic NIGP initiatives, including the NIGP Task Force for the Values & Guiding Principles initiative, the NIGP 2.0 Task Force (which re-structured the association governance model) and dozens of other task forces and committees in her 28 years of volunteer leadership to the profession. Marcheta has spoken at hundreds of international, national and regional events and is one of the industries most recognized procurement leaders in procurement transformation, procurement leadership and development, and procurement thought leadership.

As President of NIGP Code & Consulting, Ms. Gillespie will be the manager for this contract and will serve as the primary point of contact for all inquiries from the SHARE community, as well as any government entity throughout North America that chooses to leverage the cooperative contract. Ms. Gillespie's responsibilities will include:

- Discussing all potential client engagements with interested parties.
- Establishing individual contracts with clients based upon this cooperative contract.
- Ensuring compliance with all contract requirements.
- Ensuring all clients are satisfied with their service under the contract.
- Assigning work to individual consultants or consultant teams under this contract.
- Actively managing the pool of resources available under this contract, including any necessary consultant team expansion based upon growth of the cooperative contract.

- Training, evaluating and managing all consultants under this contract.
- Managing all invoicing, billing, quality control, oversight and issue resolution for any engagement under this contract.

With each potential contract engagement under the cooperative contract, Ms. Gillespie will discuss and finalize each scope of work and will determine project assignments to a Senior Consultant, Consultant or Staff Specialist based upon the scope of the work, the specific experience/expertise required under the scope of work, as well as team availability. Once a project assignment is finalized, Ms. Gillespie will finalize all required contractual documentation, as well as manage any contract modifications during the term of the contract. Ms. Gillespie will formally introduce the entity to the determined consultant or consultant team, and then will turn the project over to the lead consultant. The Senior/lead consultant will then become the day-to-day contact for the project. Ms. Gillespie will continue to provide high-level oversight over the project, as well as serve as a resource for the Senior/lead consultant or consultant team, as well as the entity Project Manager.

NIGP Consulting Team:

Our consultants are current and former procurement practitioners. Their experience and expertise are based upon their leadership and executive positions with government entities, as well as their service as consultants under contracted engagements. The attached biographies (Attachment A) reflect the diversity of skills and experience of all the consultants on the team. With an award of this cooperative contract, SHARE and all entities leveraging the cooperative contract will have access to the full team of NIGP Consultants.

The following attachments provide evidence as to how our team is uniquely and exceedingly qualified to provide support under this cooperative contract:

- Attachment A: Biographies of consulting team members
- Attachment B: Credentials of consulting team members
- Attachment C: Position descriptions and qualifications for the consulting team positions proposed under this contract

Based upon their individual and collective experience in public sector procurement, procurement leadership and extensive engagement in the public procurement community, the NIGP Consulting Team brings progressive experience in:

- contracting for goods, services, design and construction.
- acquisitions, inventory management and supply chain logistics
- large and complex project tasks including planning, specification and scope of work development, market research, cost and price analysis, negotiations, contractor performance assessment, contract management and contract closeout.
- best practices in public procurement.
- procurement technology and solutions, including Word, Excel, PowerPoint and Outlook.
- oral and written communication skills.
- project management, including schedule and budget management.
- providing expert advice and guidance to senior level staff members.

Affirmation:

NIGP Consulting affirms that neither NIGP Consulting, nor any consulting team member, has a previous record of default on a government contract, has been debarred or suspended from entering into contracts with a governmental agency or any other notification of ineligibility or prohibition against bidding or proposing on government contracts.

EXPERIENCE**Corporate Experience and Capability – The Partnership of Periscope Holdings Inc and NIGP**

NIGP Consulting is powered by Periscope Holdings, Inc. (“PHI”), a private corporation that has been entrusted by NIGP – The Institute for Public Procurement (“NIGP”) with the custodianship and management of the NIGP Consulting program. In addition to managing the NIGP Consulting program, PHI is the sole custodian of the NIGP Commodity/Services Code. With its experience and role in support of the NIGP Consulting Program, PHI qualifies, supports, and manages a team of professional public procurement experts to conduct procurement reviews, policy and procedure development, and process improvement engagements for public sector entities across North America. In contrast to others in the market, NIGP Consulting offers a deep bench of highly qualified, highly dedicated resources that are recognized as the top procurement leaders and experts in their field. The strength of the team ensures NIGP Consulting produces high quality deliverables on schedule and within budget.

NIGP, is a membership-based non-profit organization that provides support to North American professionals in public sector procurement. Since 1944, NIGP has been promoting, developing and supporting the public procurement profession through premier educational and research programs, professional support, technical services and advocacy initiatives that benefit members and constituents. NIGP represents 72 affiliate chapters, 3,000 agency members representing federal, state, provincial and local government and over 16,200 members serving the public procurement community. NIGP teamed with Periscope (focused solely on solutions for public sector procurement) to offer organizations the highest quality public procurement services available at a fair market price. Thru this partnership, NIGP consulting leverages its access to a vast network of over 17K procurement professionals and subject-matter experts throughout North America.

True Public Procurement Experts

A hallmark of the NIGP Consulting program is the unmatched level of expertise in the public procurement industry among our team members. The NIGP Consulting program, in existence since 1995, has conducted procurement analyses, reviews and provided procurement support services for over 100 public sector clients. Additionally, our team of professionals possess an abundance of knowledge and leadership experience through their roles in the public procurement industry. This directly facilitates a thorough understanding of unique circumstances and raises the bar on our effectiveness.

Our deep understanding of public procurement helps to ensure that we minimize “ramp-up time” to increase efficiency in the execution of our projects. Our NIGP consultants:

- Have served as Chief Procurement Officials, Procurement Directors, Purchasing Managers, Senior Level Staff and subject matter experts in every area of procurement.

- Possess a bachelor's degree or higher from an accredited college or university in a related field and/or over 10 years in the field, including certifications in public procurement.
- Provide an average of 25 years of direct experience with federal, state, county, city government; as well as school districts, universities, utilities, airports and special authorities.
- Have authored best practices, procurement policies and procedures, books on procurement, and procurement-related training materials.
- Possess strong project management skills, are extensively skilled in public procurement core competencies and are regular contributors and volunteer leaders in the procurement field.
- Establish strong stakeholder relationships to effectively facilitate project and staff augmentation services.
- Are highly experienced in procurement transformation, organizational development, staff development and organizational leadership.
- Possess multiple certifications including Certified Public Purchasing Officer (CPPO), NIGP-Certified Procurement Professional, Certified Public Professional Buyer (CPPB), Certified Procurement Manager and Certified Public Manager.

Relevant Experience

The NIGP Consulting program is truly unique in its single-minded purpose and tight focus on the transformation and advancement of public sector procurement. All clients are public procurement organizations and each of our consultants have hands-on experience performing critical procurement and contracting functions within public sector organizations – across a broad spectrum of governmental entities. With a public sector focus, NIGP Consulting is accustomed to the complexities of public sector procurement, government operations and legislation, contract law and public service.

A key to our success is our understanding that every public organization has a unique culture. As a consulting team, we gather information on the goals of the organization or key sponsor for the engagement as well as about the culture of the organization. The team of consultants are prepared to bring immediate value, including implementing specific best practice procurement and contracting strategies for the organization to assist in their operation. Our team is experienced with the dynamics of political environments. Further, they recognize the importance establishing standard tools and templates to ensure consistency throughout complex procurement and contracting functions. NIGP Consulting maintains confidentiality, focuses on developing close client relationships and building trust with the entity team.

NIGP Consulting ensures that the Public Procurement Values of Accountability, Ethics, Impartiality, Professionalism, Service and Transparency are engrained in every aspect of our work, our deliverables and our relationships. We helped establish these Values as well as the subsequent Best Practices of Public Procurement for our industry, and we are committed to helping all public procurement entities transform into centers of procurement excellence.

Agency Experience

Below is a sampling of the entities we have completed projects for over the past 15 years. These engagements offer evidence of the breadth of knowledge, experience, and capability of the NIGP Consulting Program to deliver superior consulting service in the public sector.

- Alachua County, FL
- Anchorage School District, AK
- Arlington County, VA
- Atlanta Housing Authority, GA
- Austin School District, TX
- CalOptima Integrated Health Services, CA
- Cecil County, MD
- City of Annapolis, MD
- City of Austin, TX
- City of Sunrise, FL
- City of Dallas, TX
- City of Denton, TX
- City of Gainesville, FL
- City of Garland, TX
- City of Hamilton, ON
- City of Kirkwood, MO
- City of Long Beach, CA
- City of Miami Beach, FL
- City of Milwaukee, WI
- City of North Miami Beach, FL
- City of Orlando, FL
- City of Palo Alto, CA
- City of Pittsburgh, PA
- City of San Antonio, TX
- Contra Costa County, CA
- Columbus City Schools District
- DC Public Schools
- Fairbanks North Star Borough, AK
- Golden Gate District Authority
- Houston County, TX
- Howard County, MD
- Imperial Irrigation District, CA
- Lee County, FL
- Long Beach Port Authority, CA
- Loudon County, VA
- Manatee County, FL
- Maricopa County, AZ
- Mecklenburg County, NC
- Milwaukee County, WI
- Montgomery County, OH
- New Braunfels Utility District
- Norfolk Public Schools, VA
- Orange County, CA
- Pima Community College, AZ
- Prince George County, MD
- Sarasota County, FL
- Seminole County, FL
- Snohomish County, WA
- St. Louis County, MO
- St. Mary's Metro County Commission, MD
- State of Illinois Capital Board
- State of Maine
- State of Maryland
- State of Michigan
- State of Nevada
- State of Oregon Treasury
- State of Washington
- Suffolk County, NY
- Town of Hollywood, FL

Our previous NIGP Consulting work represents a wide variety of complexities, media interest, reorganizations, politically sensitive environments, extreme pressure from upper management and elected official involvement. Regardless of the type of organization, the environment or organizational culture, our proposed consultant team members have consistently met the challenges at hand and provided recommendations that helped organizations achieve their goals.

ATTACHMENT A – CONSULTING TEAM BIOGRAPHIES

LYNDA ALLAIR, CPPO, NIGP-CPP – SENIOR CONSULTANT

Lynda Allair, CPPO, NIGP-CPP, is a dynamic speaker, trainer, consultant, and experienced leader with over 40 years in the provincial, municipal, and healthcare sectors of the procurement profession in Canada. Lynda has extensive expertise in procurement legislation, both nationally and internationally, policy development, cross-functional planning, project implementation, procurement performance, and business analysis. She possesses a solid and extensive foundation in public procurement best practices, change management, continuous improvement methodologies, professional development, and leadership to facilitate supply chain transformation. Lynda retired from the Province of Ontario's Broader Public Sector Supply Chain Secretariat where she provided project management advice and support to broader public sector entities throughout the province in their mission to modernize and transform their supply chain practices.

Lynda now shares her expertise and experience with both public and private industry through various roles. She has been an NIGP Instructor since 1999 and part of NIGP's curriculum development team since 2003. She instructs classes at the University of Guelph and provides extensive training, public speaking, and professional services in the profession to other organizations as an independent contractor. Lynda has been a part of the NIGP Consulting Program working with Periscope Holdings, Inc (the managing corporation for the NIGP Consulting Program) since 2010.

Lynda is the 2012 Distinguished Service Award recipient, the second highest honor bestowed upon individuals by NIGP in the public procurement profession. She has been a member of numerous NIGP Committees during her 34 years of volunteer leadership. She is a Past President of the Ontario Public Buyers Association and served nearly ten years as a Canadian Public Procurement Council (CPPC) Board member.

MARIA DE LOUDES-COSS, MPA, CPPO, NIGP-CPP – SENIOR CONSULTANT

María de Lourdes Coss has over 27 years of public procurement experience, 20 of which have been in executive leadership roles with the City of Houston, City of Chicago, Cook County, University of Illinois at Chicago, and the Public Building Commission of Chicago. Throughout her career, Lourdes has had many accomplishments including in excess of \$100MM in cost savings and operational efficiencies, which resulted from the successful implementation of various procurement transformation initiatives and effective change management strategies. Most recently, her leadership resulted in the achievement of the 2015 NPI Excellence in Procurement Award and 2015 NIGP Measure Up Award for the City of Houston.

Lourdes developed and implemented public policy, many of which were institutionalized and are still in use in the organizations that she served. Some of these policies include but are not limited to the financial rating for construction contractors, evaluation procedures, protest procedures, negotiation benchmarks, Quick Reference Guide series, and vendor performance evaluations. She also had a leadership role in drafting changes to the procurement law, which were adopted by the governing bodies of Cook County and the City of Houston during her tenure.

As part of transformation processes led, Lourdes implemented professional development programs for staff resulting in the significant enhancement of the knowledge base, at least 50% increase in

professional certifications, and a return on investment in less than one year. She also implemented technology reducing manual processes by at least 40% and enabling the redeployment of resources in areas of need, therefore, minimizing the need for additional staff. While at the Public Building Commission, she was appointment to the Power Alliance Board of Directors, an organization that leveraged energy demand of public agencies in the Chicago area. At the University of Illinois, Lourdes co-chaired the green purchasing sub-committee initiating a collaborative effort with other government agencies to make green products affordable to the University. She was appointed by the Illinois Governor to serve on the Business Enterprise Program Council on behalf of Illinois Higher Education's 13 campuses and her efforts resulted in greater awareness and enhanced the minority and women- enterprise participation in public universities. Ms. Lourdes also has experience in working with small, minority, and women-owned business development programs.

Lourdes holds a BSS (magna cum laude) from the University of Puerto Rico and an MPA from Florida State University. She is also a Certified Public Purchasing Officer. She served on the National Institute of Government Purchasing Board from 2009 through 2013. Ms. Coss is proposed as the Senior Consultant for the engagement and will be the primary point of contact for the project, working closely with the County's assigned Project Manager.

DENISE K FINN, NIGP-CPP, CPPO, C.P.M., CPPB – SENIOR CONSULTANT

Denise K. Finn, NIGP-CPP, CPPO, C.P.M., CPPB is a Senior Consultant with NIGP Consulting, an NIGP instructor, and leader in public procurement. Denise has over twenty-five years of professional procurement experience in both the public and private sector.

Denise spent most of her public procurement career serving higher education at Yavapai College in Prescott, Arizona and the University of Kentucky in Lexington, Kentucky before moving to the gulf shores of Florida in 2016 where she leads the Procurement team at the City of Fort Myers. She has vast experience in many areas of public procurement with a specialty in Policy and Procedures, procurement cards, solicitations, contract management and change management. Denise has been actively involved in both local and national public procurement associations having served on regional and national boards.

Denise currently represents NIGP on the National Council for Public Procurement and Contracting (NCPPC), a Council that joins the voices of eight charter associations representing more than 37,000 members and is the Treasurer for the Florida Association of Public Procurement Officials (FAPPO). Denise has earned many awards over the years including the Bob Ashby Mentor of the Year Award, the Higher Education Sector Leadership in Greener Purchasing, Volunteer of the Year Award, the Nancy Tregoe Scholarship, the Distinguished Service Award, the Achievement in Excellence in Procurement Award, and the Sterling Agency Award. Denise is a strong proponent of the profession, continuing education and certification and is always happy to play it forward by sharing her knowledge and experience with others.

MARCHETA E. GILLESPIE, FNIGP, NIGP-CPP, CPPO, C.P.M., CPPB, CPM – SENIOR CONSULTANT

Marcheta E. Gillespie, FNIGP, CPPO, NIGP-CPP, CPPB, C.P.M., CPM, is a dynamic international speaker, professional consultant and trainer, and experienced thought-leader with 30 years in the procurement profession. In 2021, Marcheta become the President of NIGP Code and Consulting Services. She is the

former Director of Procurement at the City of Tucson, leading one of country's most highly acclaimed procurement organizations. Retired from government service, Marcheta now works with public and private industry helping them transform their procurement operations. Prior to becoming President, Marcheta served as Program Manager and Senior Consultant working with Periscope Holdings, Inc (the management corporation for the NIGP Code and Consulting Program).

As a passionate advocate for the procurement profession, Marcheta possesses a broad and deep range of expertise in numerous areas of public procurement best practices, professional development and leadership, and overall procurement transformation. Marcheta is the 2019 Albert H Hall recipient and the 2017 Distinguished Service Award recipient, the highest and second highest honors bestowed upon individuals by NIGP in the public procurement profession. Marcheta is a former Chair of the UPPCC Governing Board, was the 2013-2014 President of NIGP and served on the NIGP Board of Directors for 10 years.

Marcheta has chaired several historic NIGP initiatives, including the Public Procurement Values & Guiding Principles initiative, the NIGP 2.0 Task Force (responsible for restructuring the association governance model) and dozens of other task forces and committees in her 30 years of volunteer leadership to the profession. She is now Co-Chair of the NIGP Mentorship Committee, a member of the NIGP Business Council, and has helped stand up numerous community networks for procurement professionals.

Marcheta is a regular contributor, advocate and mentor in the profession. She has spoken at hundreds of international, national and regional events. She is author to numerous published works in the profession. Marcheta has provided professional consulting services to states, cities, counties, universities, special districts and airports throughout North America.

TERRY L. MCKEE, MPA, CPPO, CPPB, NIGP-CPP, C.P.M., CPCP – SENIOR CONSULTANT

Terry McKee, MPA, CPPO, CPPB, NIGP-CPP, C.P.M., CPCP, is a consultant and experienced leader with 33 years in the procurement profession. Terry joined NIGP Consulting Services at its inception in 1995. He has been the Procurement Director at Knoxville's Community Development Corporation-the public housing and redevelopment authority for the City of Knoxville and Knox County, Tennessee since 2005. Prior to that he served as head of procurement for Knox County government and Knox County Schools. Terry shares his extensive experience and expertise with public and private industry through numerous roles in the industry.

As a passionate advocate for the procurement profession, Terry possesses a broad and deep range of expertise in numerous areas of public procurement best practices, professional development and leadership, and overall procurement transformation. Terry was named NIGP's Purchasing Manager of the Year in 2017, the East Tennessee Purchasing Association's Procurement Manager of the Year in 2017, and in 1993 received the organization's Purchasing Professional of the Year award. In 2013, Terry received NIGP's "Spirit of NIGP" award. He co-shared NIGP's Innovation of the Award in 2007 for business diversity activities.

Terry has served in dozens of task forces and committees in his 33 years of volunteer leadership to the profession, including local, state and national roles. Terry has provided professional services to cities, counties, special districts and entities throughout North America.

PENNY OWENS, NIGP-CPP, CPPO – SENIOR CONSULTANT

Penny Owens has nearly 30 years' experience in public procurement, both local and federal government, which covers nearly all aspects of procurement. She spent 16 years at the Oak Ridge National Lab in procurement and the last 13 years at the City of Knoxville, where she currently serves as the Purchasing Agent, leading the Purchasing Division which includes the City's surplus property sales and the Small Business and Diversity Business Outreach Office.

Penny holds a bachelors' degree in Business, a NIGP-Certified Procurement Professional (NIGP-CPP) certification, and a Certified Public Procurement Officer (CPPO) certification. Penny is an active member of the East Tennessee Purchasing Association (ETPA), the Tennessee Association of Public Purchasing (TAPP), and NIGP, The Institute for Public Procurement. Penny serves as ETPA's Mentoring Chair, is an NIGP Chapter Ambassador for Area 3, covering Tennessee, Kentucky, West Virginia, Indiana, Ohio, Michigan and Ontario, Canada, serves on NIGP's Test Development Committee which is responsible for the development of exam questions for NIGP's certification program, and is also on NIGP's Consulting team, managed by Periscope.

Based on her endeavors to support the public procurement profession, Penny was the recipient of both the Buyer of the Year and Volunteer of the Year award by ETPA in 2017. She speaks annually at her local chapter events, presents at NIGP's annual Forum and offers presentations for the Area 3 chapters as well as other chapters across the county.

JOHN ADLER, CPPO - CONSULTANT

John O. Adler, CPPO has over 40 years of experience in public sector procurement and has served the industry as an author, instructor, and consultant. John has served extensively in volunteer leadership positions for the public procurement industry, including serving as National Association of State Procurement Officers Board President, Vice Chair of the Universal Public Procurement Certification Council (UPPCC). In 2019, Adler received the Julio Mazzone Award, the highest honor bestowed upon a state chief procurement officer by NASPO. John has been a member and active volunteer for the Institute of Supply Management, National Contract Management Association, Design-Build Institute of America, and NIGP The Institute for Public Procurement, and served as Procurement and Materials Management Committee Chair and Board Member for the American Public Transportation Association.

Adler serves as an Adjunct Instructor for the National Transit Institute/Rutgers University, was Vice President of Procurement for Dallas Area Rapid Transit (DART) in Dallas, Texas, and served as State Procurement Director of the State of Arizona Department of Administration. Adler has a Bachelor of Science in Business Administration from Arizona State University.

DENISE E. BADILLO, NIGP-CPP, CPPO, CPPB – CONSULTANT, STAFF AUGMENTATION

Denise E. Badillo, NIGP-CPP, CPPO, CPPB is an out-going, energetic, professional trainer and leader with over 27 years in the procurement profession. Denise is the Director of Procurement at the City of North Charleston where her knowledge, passion, and management skills, has not only earned her the respect of her team members and agency, but that of the supplier community as well. Denise's foresight and integrated thinking introduced the first Design Build method of construction procurement to the City, she

has managed several since. Denise has been an active instructor for NIGP for the past five years, enabling her to train and instruct others while learning from them as well.

Denise is an active member of the South Carolina Association of Governmental Purchasing Officials (SCAGPO). She served on the executive board as Treasurer for the past six years and is now leading the Professional Development of the organization. Over the past 25 years of volunteer service with SCAGPO, Denise has chaired or served on multiple committees, and was named 2019 Manager of the Year.

As a member of NIGP, Denise has volunteered and served on multiple NIGP initiatives, Audit task force, quality control team member, co-authored several texts for the Pathway curriculum, and her greatest achievement, being able to give back to her loved profession, serving in the mentorship program.

Denise is a forward, out of the box thinker, who believes in producing solutions for her clients and their needs. Denise's personality, drive, and passion for the procurement profession enables her to relate and react to all levels of experience.

KIRK BUFFINGTON, CPPO, C.P.M., NIGP-CPP – CONSULTANT, STAFF AUGMENTATION

Kirk Buffington is the former Director of the Department of Procurement Services for the City of Fort Lauderdale, FL. Before coming to the City of Fort Lauderdale, Kirk was the Purchasing Agent for Osceola County. In addition, Kirk has purchasing experience with the Orange County School Board, and also as a Grocery Buyer with the Wal-Mart Corporation, and as a Receiving Supervisor with the Walt Disney World Co.

Kirk has a B.S. in Business Administration from Florida State University, and an MBA, with a concentration in Procurement and Acquisitions Management, from Webster University, St. Louis, MO. Mr. Buffington served as President of the Florida Association of Public Purchasing Officers and was elected to the NIGP Board of Directors in July 2003 and became President of NIGP on July 1, 2008.

In addition to his activities with NIGP, Mr. Buffington has also served the National Purchasing Institute, NPI, on their Selection and Evaluation Committee for the Achievement of Excellence in Procurement Award. Mr. Buffington co-authored the NIGP LEAP text "The Legal Aspects of Purchasing" and has published numerous articles in the NIGP Tech Bulletin, and various articles concerning Procurement Case Law in the state and local NIGP and FAPPO newsletters.

ELVIA FERNANDEZ, CPPO, CPPB – CONSULTANT, STAFF AUGMENTATION

Elvia Fernandez is a former Deputy Chief Procurement Officer with 25 years of experience in different facets of procurement. Elvia held senior leadership positions in procurement for large government agencies, such as the City of Chicago, University of Illinois at Chicago, and Cook County. She has a track record of leading her teams to achieve high levels of productivity, efficiency and sustainable results. Elvia is a hands-on leader experienced in various facets of procurement including but not limited to construction, A&E, a variety of goods and services. She is also experienced in monitoring and compliance of diversity and inclusion programs.

Elvia is a graduate of the University of Illinois Urbana, where she obtained her B.S. in Business Administration. She holds dual certifications from the Universal Procurement Certification Council: CPPB and CPPO.

Elvia is a certified John Maxwell Team Coach, Speaker and Trainer. She is a DISC Personality Assessment Trainer; a Dr. Amen Brain Health Licensed Trainer; and Neuroencoding Specialist. In addition, Elvia serves the Empowered Living Community as a team-lead, mentor and ambassador.

BARBARA JOHNSON, MPA, NIGP-CPP, CPPO, CPPB - CONSULTANT

Barbara R. Johnson, MPA, NIGP-CPP, CPPO, CPPB served for 38 years as a City, State, and Airport Authority Procurement Leader. Johnson was named the 2021 Albert H Hall Award recipient, NIGP's highest honor for a public procurement professional, making her a Fellow of the Institute. She is also a previous recipient of the Distinguished Service Award, the Institutes' second highest honor. Johnson serves NIGP in numerous roles and on various committees, task forces, and as a frequent Forum speaker and moderator. She co-founded NIGP Radio and serves as a Master Instructor for the Institute. Barb develops and instructs public procurement courses for the Institute (NIGP) and the Ohio State University.

JILL KLASKIN PRESS, CPPO – CONSULTANT, STAFF AUGMENTATION

Jill worked for Miami Dade County in the Department of Procurement Management (DPM) for 28 years, serving as Assistant to the Director for most of her career and overseeing a \$1 billion dollar spend on goods and services for the County. She holds a certification as a Certified Public Purchasing Officer (CPPO) from the Universal Public Purchasing Certification Council (UPPCC). She is an active participant in The National Institute of Governmental Purchasing (NIGP) at both the Chapter and National levels since 1985. She served as Chair of the National NIGP's Policy and Position Committee in 2010 and served on the Universal Public Purchasing Certification Council (UPPCC) Board of Examiners from 2007-2010. She was recently appointed to serve on the UPPCC Board of Directors, representing NIGP.

She has been a nationally recognized leader in guiding the legislative efforts in the House and Senate to Repeal Section 511 of the Tax Increase Prevention and Reconciliation Act. With the passage of H.R.674, she helped state and local governments save over \$17 Billion annually. She was also instrumental in passing legislation to open Federal GSA Schedules to State and Local governments.

She was responsible for developing and implementing Miami Dade County's revenue generating User Access Program (UAP) in 2003. To date the program has generated over \$200 million in revenue to support various County department's day to day operation and a rebate of \$50 Million to municipalities utilizing the program.

She assisted DPM with receiving national recognition as the winner of several achievement awards from NACO, NPI and the NIGP Agency Accreditation, and in 2006, the prestigious National Institute of Governmental Purchasing Pareto Award. In 2009 she was awarded the GSA Excellence in Partnership Award for the Best Use of Cooperative Purchasing. In 2013 she was awarded the "Spirit of NIGP" Award for Leadership.

Over the years she was appointed by the Miami Dade County Board of County Commissioners to serve on four different County Advisory Boards. She has been an active participant in the Florida community, serving by appointment to the Supreme Court of Florida, as an investigating member of a Grievance

Committee for the Florida Bar Association from 2001 to 2004. In 2005 and again in 2016, she was appointed to a 3-year term by the Florida Supreme Court to serve on the Unlicensed Practice of Law Committee. In 2009 and again in 2017, she was appointed by the Florida Supreme Court to serve on the Standing Committee for Unlicensed Practice of Law. In 2019 she was selected to serve a 2-year term on the Board of Directors for the UPPCC (Universal Public Procurement Certification Council) which is the only international organization for certifying public procurement professionals. In 2020 she was appointed to 1-year term on Miami Dade County's Goods and Services Task Force and was elected to serve as Vice-Chair.

TERRYL A ROBINSON, NIGP-CPP, CPPO, CPPB, MBA – CONSULTANT

Terryl (Terry) A. Robinson, CPPO, CPPB, MBA currently serves as the Director of Procurement and Payment Services for Pima County Community College District in Tucson, AZ. Additionally, he serves as an Adjunct Professor and Subject Matter Expert (SME) for Pima Community College's Logistics & Supply Chain Management Program, responsible for developing and teaching Core Course Work for the Introduction to Purchasing curriculum (LGM-107). As PCC's Chief Procurement Officer, his responsibilities include overseeing centralized college wide purchasing, holding contract signature authority, directing the colleges Payment Services activities (i.e., p-Card Program Management and Accounts Payable Services).

Formally the Principal Contract Officer for the City of Tucson Business Services Department's Procurement Satellite Office at the Tucson Water Department, he was responsible for managing the contracting staff and overseeing Tucson Water's wide-ranging portfolio of contracts, which had a contracting value in excess of \$400 million dollars.

Mr. Robinson has over 10 years leadership experience with City Government and over 15 years of managerial and corporate training experience in private sector business. Robinson holds an MBA from Troy State University (2000); is an alumni of the University of Arizona's Eller Executive Education Program (2017); and is 10-year University of Arizona Black Alumni Board Member. He is pursuing a Doctorate Degree in Higher Education through Grand Canyon University with a dissertation focused on online collaborative learning.

Mr. Robinson is currently a Certified Instructor for the NIGP and Mentor. He is also an active member of the Southern Arizona Copper Chapter of the NIGP, formally serving as the chapter's Vice President, responsible for the Chapter's Education Program.

RENEE A. ROGERS, C.P.M., CPPO, PHR – CONSULTANT, STAFF AUGMENTATION

Renee spent over 20 years in public procurement, starting out as a buyer with Pima County, and moving up to executive management roles in public entities. Renee has worked in City, County, and Airport Authority environments, getting entrenched in procurements including those using grant funds from a wide variety of state and federal agencies. Renee has continued to work with local public and private agencies in the procurement field, primarily in a consulting role. Renee has also been a public procurement instructor for over 30 years.

Throughout her career, Renee has actively participated in professional associations in leadership roles, including serving as Professional Development Chair for both the Airport Purchasing Group and the Michigan Public Procurement Officer Association (MPPOA). Renee has taught numerous public

procurement and related classes at procurement association conferences, as well as within her entities.

Renee holds several professional certifications including NIGP Certified Procurement Professional (NIGP-CPP), Certified Public Purchasing Officer (CPPO), Certified Purchasing Manager (C.P.M.), Certified Professional Public Buyer (CPPB), and Professional in Human Resources (PHR). She is a graduate of Troy State University (Masters in Business) and Michigan State University (Bachelors in Marketing).

Renee has received awards recognizing her contributions to the public procurement profession, including the MPPOA Purchasing Manager of the Year Award and the MPPOA Marvin Klang Award, which recognizes a lifetime contribution to the public procurement profession. In addition, while she was the chief procurement officer, two of Renee's former entities became a first-time recipient of the National Purchasing Institute's Achievement of Excellence in Procurement Award.

KATE ROTELLA, CPPO, NIGP-CPP, MBA – CONSULTANT, STAFF AUGMENTATION

As a respected leader and Director of Purchasing, Kate has served over 20 years in procurement and finance. Kate has served as a public procurement professional, overseeing and leading procurement operations for a municipality, higher education institution and a large K-12 education district. Kate was also State Representative serving Stonington and North Stonington's 43rd district. She served as a member of the Appropriations Committee, Education Committee, and Internship Committee.

As a leader Kate has been managing relationships and influencing outcomes inspiring trust, collaboration and commitment to operational excellence and strong customer service. Leading through collaboration, creativity and effectiveness in complex organizations, she has developed support and created improvements for both internal and external operations. She has helped to develop staff and create operational efficiencies through training and consulting, leading innovation and improvement to organizational systems and procedures.

Rotella has a Master of Public Administration from the University of New Haven, and a Bachelor's degree from Eastern Connecticut State University. She served as the Director of Finance and Purchasing for Mitchell College, Purchasing Agent for the Town of Waterford, and Purchasing Manager for the Capitol Region Education Council in Hartford, CT.

RAY VALDEZ, CPPB – STAFF AUGMENTATION

Ray Valdez, CPPB, is a consultant and experienced Procurement Practitioner with 21 years in the procurement profession. Valdez served as a Principal Contract Officer for the City of Tucson from 2001 through 2017 and as a Procurement Administrator for the Tucson Airport Authority from 2017 through 2021. Valdez shares his extensive experience and expertise with public and private industry through numerous roles in the industry. As a passionate advocate for the procurement profession, Ray possesses a broad and deep range of expertise in numerous areas of public procurement best practices. Ray has served in numerous NIGP local chapter committees in his 21-year Procurement profession in southern Arizona.

ATTACHMENT B – CONSULTING TEAM CREDENTIALS

TEAM MEMBER	TITLE	CREDENTIAL
Marcheta Gillespie	President NIGP Code & Consulting Senior Consultant	CPPO - #1596 (Exp 11/26/23) NIGP-CPP - #253 (Exp 12/31/23) CPPB - #3191 (Exp 8/1/24) C.P.M. - #40076 (Lifetime) CPM – Issued 6/28/04
Lourdes Coss	Senior Consultant, Sr Staff Specialist	CPPO #1638 (Exp 11/23) NIGP-CPP #432 (Exp 6/30/24)
Terry McKee	Senior Consultant	CPPO #819 CPPB #1517 CPCP #21000304 C.P.M. - #26367 NIGP-CPP #911
Lynda Allair	Senior Consultant	CPPO #865 (Lifetime)
Denise Finn	Senior Consultant	NIGP-CPP #71 (Exp 10/01/23) CPPO #1457 (Exp 3/25/25) CPPB #7202 (Exp 3/25/25) C.P.M. #37977 (Lifetime)
Penny Owens	Senior Consultant	CPPO #13284 (Exp 10/20/24) NIGP-CPP #37 (Exp 8/31/23)
Barbara Johnson	Consultant	CPPO - #1051 (Lifetime) NIGP-CPP - #85 (Exp 9/30/23) CPPB - #1377 (Lifetime)
Kirk Buffington	Consultant, Sr Staff Specialist	NIGP – CPP (Awarded, pending notice) CPPO#1440 (Exp 8/5/26) C.P.M. (Lifetime)
John Adler	Consultant	CPPO #910 (Lifetime)
Renee Marsh	Consultant, Sr Staff Specialist	CPPO #1182 (Lifetime) CBBP #4526 (Lifetime) C.P.M. #28007 (Lifetime) PHR #600461430PHR (Exp 11/30/22) NIGP-CPP (Exp 8/19/23)
Kate Rotella	Consultant, Staff Specialist	CPPO #11387 (Exp 5/2/26)
Craig Rader	Consultant, Staff Specialist	CPPO #10713 (Exp 2/11/23) CPPB #8164 (Exp 2/11/23)
Denise Badillo	Consultant, Staff Specialist	CPPO #12956 (Exp 6/7/22) CPPB #6309 (Exp 6/7/22)
Elvia Fernandez	Consultant, Staff Specialist	CPPO #10682 (Exp 12/31/22) CPPB #1775 (Exp 12/31/22)
Terryl Robinson	Consultant	CPPO #13577 (Exp 10/16/22) CPPB #13414 (Exp 5/4/25) NIGP-CPP #190 (Exp 12/3/23)
Jill Klaskin-Press	Consultant, Staff Specialist	CPPO - #849 (Lifetime)
Ray Valdez	Staff Specialist	CPPB (In renewal)

ATTACHMENT C – POSITION DESCRIPTIONS AND QUALIFICATIONS

Senior Consultant (Lead)	<ul style="list-style-type: none"> • Bachelor's Degree or higher from an accredited college or university in a related field or equivalent years of extensive procurement experience in a position of management and leadership such as Chief Procurement Official. • 15 years or more of progressively responsible procurement experience in public-sector procurement. • Experience in management or leadership role, including experience working with political and executive leadership. • Experience leading significant, complex procurement projects, including policy development, process efficiencies, program development or other procurement improvement and transformation projects. • Demonstrated executive decision-making skills and judgment. • Ability to research and define project scopes and schedules, as well as development and delivery of professional-grade project deliverables. • Experience providing expert advice and guidance to agency senior level leadership and staff. • Extensive experience in project management and contract administration. • Knowledge of how to effectively apply technical expertise on the effectiveness and efficiency of government programs. • Ability to research and define project scopes and schedules, as well as development and delivery of professional-grade project deliverables. • Possesses the analytical and evaluative methods and techniques for assessing program development and execution. • Must have the ability to analyze project requirements and develop strategic solutions and plans to meet agency's needs. • Able to provide highly technical and specialized guidance concerning solutions to complex problems. • Extensive oral and written communication skills. • Ability to apply industry best practices and principles to transform procurement operations. • Minimum CPPO certification and/or NIGP-CPP certification. Multiple certifications desired. • All requirements of the Consultant position.
Consultant	<ul style="list-style-type: none"> • Bachelor's Degree or higher from an accredited college or university in a related field or equivalent years of procurement experience in a position of progressive responsibility in a public procurement capacity. • 8 years or more of progressively responsible experience in public procurement. • Experience managing significant, complex procurement projects. • Demonstrated decision-making skills and judgment.

	<ul style="list-style-type: none"> • Ability to manage and direct large and complex project tasks covering contract administration which may include acquisition planning, RFP/IFB preparation, market research, cost and price analysis, evaluation of performance, contract termination, and contract closeout. • Ability to research and define project scopes and schedules, as well as development and delivery of professional-grade project deliverables. • Extensive experience in all procurement sourcing methods and contract administration. • Ability to apply advanced or specialized procurement knowledge, including knowledge of public procurement best practices • Possesses the analytical and evaluative methods and techniques for procurement sourcing activities. • Must have the ability to analyze project requirements and develop strategic solutions and plans to meet agency's needs. • Applies principles and methods of the subject matter to specialized solutions. • Minimum CPPO certification and/or NIGP-CPP certification. Multiple certifications desired.
Senior Procurement Staff Specialist (Staff Augmentation)	<ul style="list-style-type: none"> • Bachelor's Degree or higher from an accredited college or university in a related field or equivalent years of experience. • Eight (8) or more years of progressive experience and possess extensive knowledge when advising on large and high complex project/programs • Extensive experience in all procurement sourcing methods and contract administration. • Ability to apply advanced or specialized procurement knowledge, including knowledge of public procurement best practices • Possesses the analytical and evaluative methods and techniques for procurement sourcing activities. • Must have the ability to analyze project requirements and develop strategic solutions and plans to meet agency's needs. • Applies principles and methods of the subject matter to specialized solutions. • Must have the ability to analyze project requirements and develop strategic solutions and plans to meet agency's needs. • Able to provide highly technical and specialized guidance concerning solutions to complex problems. • Demonstrates decision-making skills and judgment in alignment with procurement best practices. • Minimum CPPO certification and/or NIGP-CPP certification. Multiple certifications desired.
Procurement Staff Specialist (Staff Augmentation)	<ul style="list-style-type: none"> • Bachelor's Degree or higher from an accredited college or university in a related field or equivalent years of experience • Five (5) or more years of progressive experience in public procurement • Extensive experience in all procurement sourcing methods and contract

	<p>administration.</p> <ul style="list-style-type: none"> • Ability to apply advanced or specialized procurement knowledge, including knowledge of public procurement best practices • Possesses the analytical and evaluative methods and techniques for procurement sourcing activities. • Must have the ability to analyze project requirements and develop strategic solutions and plans to meet agency's needs. • Able to provide highly technical and specialized guidance concerning solutions to complex problems. • Applies principles and methods of the subject matter to specialized solutions. • Ability to read and interpret entity's local and state acquisition policy, regulations, and directives and apply those interpretations fully and legally to all activities • Ability to analyze cost and pricing data, assistance in proposal evaluations, and assistance in preparing contract negotiations. • Minimum CPPB certification and/or NIGP-CPP certification. Multiple certifications desired.
Procurement Analyst	<ul style="list-style-type: none"> • Five (5) or more years of experience in working with public procurement • Five (5) years or more of relevant experience in developing and applying analytic methodologies • Able to provide technical and specialized guidance concerning solutions to capturing procurement data • Ability to analyze procurement data, producing meaningful analysis. • Ability to lead the application of analytic techniques and assist in defining the project objectives, methodologies, and principles. • Ability to perform a wide range of analytical tasks with the continuous improvement of processes, personnel, organization, system, or training. • Experience in working with procurement contracts, contract data, and supplier data.

TAB D: TECHNICAL PROPOSAL

NIGP Consulting is the premier consulting program at NIGP – The Institute for Public Procurement focused on developing and supporting entities toward procurement transformation and modernization. For over 25 years, NIGP Consulting has offered professional procurement consultation and support services to public procurement entities throughout North America. With an unparalleled level of expertise in the public procurement industry, our team of thought-leaders are current and former practitioners located throughout the USA and Canada. They possess an abundance of knowledge, expertise and leadership experience gained through executive and senior level management roles in the industry as well as serving as consultants, speakers, instructors, authors and volunteer leaders in areas throughout NIGP and the public procurement community. Our team of consultants works diligently with each client to understand their organization's needs, apply best practices and determine the most relevant solutions tailored to each unique project engagement.

NIGP Consulting is offering both staff augmentation support services, as well as an extensive portfolio of procurement services focused solely on public sector government entities. With over 20 team members to provide services under this cooperative contract, NIGP Consulting is excited about the opportunity to partner with NCTCOG and the SHARE community to make this contract a premier cooperative tool in procurement support services not only throughout the state of Texas, but throughout the United States.

STAFF AUGMENTATION

Professional, procurement staff augmentation services provided by experienced procurement practitioners. In addition, advisory and support services provided by staff positions ranging from Chief Procurement Officer to Contract Officer/Buyer level staff support. Areas of support services include:

- Procurement Advisory Services: Executive level perspective and guidance on procurement strategy, policy, organizational structure, staffing, planning, program development, internal/external stakeholder relationship management, talent management and other related procurement topics and issues.
- Staff support services (Temporary/Interim Procurement Services): Services include:
 - developing specifications, scopes of work
 - determining appropriate terms and conditions for solicitations
 - risk assessment
 - facilitating sourcing processes
 - supplier outreach, diversity/inclusion and engagement
 - calls, meetings, emails or other communications related to purchasing and contract services activities
 - contract negotiations
 - review of contracts and contract modifications
 - contract administration
 - support services for internal and external stakeholders.
- Project Specific Support Services/Subject Matter Expertise: Services may include support for implementation of consulting report recommendations, assistance with analysis of available project delivery methods for a specific project, or support from a subject matter expert.

In addition to fully complying with all the requirements outlined in the scope of work, NIGP Consulting also provides services for other public sector procurement consulting needs. Our services focus on procurement transformation and our unique approach to projects combined with our extensively experienced consultants, position us to provide exceptional services in over a dozen procurement service areas.

NIGP CONSULTING PORTFOLIO OF PROCUREMENT SERVICES

While the following narrative provides a listing of distinct service offerings, clients may customize and combine services to meet their unique project or service needs.

Strategy

- **Strategic Procurement Assessment**

A thorough strategic assessment of a public entity's procurement operations. This holistic assessment focuses on aligning the procurement operation with the mission and vision of the entity and public procurement best practices. The assessment considers the overall effectiveness of the procurement operation within any of the following focus areas:

- Procurement legislation, policies and procedures
- Procurement practices and methodologies
- Organizational structure and staff analysis
- Customer engagement and service analysis.

Optional focus points of the assessment may include:

- Program analysis (including use of cooperative contract opportunities, procurement card (PCard), contract administration, warehouse and inventory operations, and the usage of small/minority/women/disadvantaged business enterprise programs)
- Technology assessment in support of the procurement processes
- Performance metrics and measures analysis
- Benchmark analysis.

Policy and Procedure

- **Policy and Procedure Assessment**

A review of enabling procurement legislation (statutes, ordinances, policies and procedures) for identification of potential policy revisions for improved performance, alignment with industry best practices and maximizing the effectiveness of the procurement function. Policies and procedures will be reviewed and compared to the American Bar Association Model Procurement Code and Regulations, appropriate State requirements, other relevant benchmarks and two comparable entities, as determined by the Consultant and the Client.

Services may include any of the following:

- Analysis of existing legislation, ordinance and related procurement policy
- Analysis of existing policy or procedure manuals
- Analysis of existing process maps.

Optional focus points of the assessment may include:

- Development of procurement policy or procedure
- Process Mapping of current and future state procurement processes
- Analysis and/or development of systems/program/training manuals.

Process Mapping

- **Process Mapping Services**

Conduct process mapping of current and future state processes and procedures. Process maps will document current-state actions, decision points, roles, documents, data, metrics, approvals, connections and systems/technology for identified procurement process. Typical procurement processes to be mapped may include requisitions, purchase orders, change orders, Invitation for Bid, Request for Proposal, contracts, contract amendments and receiving. A gap analysis will identify opportunities for transformation from current state to a desired future state. An action plan with recommendations for the proposed future state will be developed with the client.

Leadership

- **Advisory Support Services**

Advisory services for public procurement leaders to advance and transform their entity, their culture and their staff for increased efficiency and effectiveness in support of internal and external stakeholders. Services are customized to the needs of the client and may include reviewing and advising on procurement strategy, policy, management, staff development, training, customer communication, and leadership coaching.

Organization and Staff

- **Organizational Structure and Staff Analysis**

Analysis of the procurement organizational structure and procurement staff to determine overall effectiveness, efficiency, and compliance with the mission of the organization and industry best practices. The analysis and recommendation may include one or more of the following areas:

- staff roles and responsibilities
- staff job title/description
- staff workload analysis and assignments
- staff delegation of authority
- staff knowledge/skills/abilities/certification,
- staff training and development
- staff performance metrics and measures.

Procurement Programs

- **Program Analysis and Development**

Analysis, recommendations and/or development of procurement programs, which may include PCard, contract administration, supplier diversity/inclusion (such as minority/women/disadvantaged/local business enterprise), inventory/warehouse management, contract compliance and other related program areas. Available services include analysis and recommendations on existing programs, and development of program policy, structure, processes and staffing plans.

- **Contract Administration Review**

Evaluation of the entire contract administration process that includes analysis of:

- Existing contract administration program policies and procedures
- Contract administration positions
- Contract administration training programs
- Roles and responsibilities of internal and external stakeholders

- Contract administrator delegation process and documentation
- Supplier performance and compliance.

- **Procurement Card Program Review**

Review of the entity's PCard program that includes the following:

- Evaluation of current policies and procedures for adequate internal controls
- Review of PCard contract with the entity's financial institution provider for effectiveness and opportunities for improvement.
- Review of cardholder's PCard documentation files and transaction registers to test compliance with current policies, procedures and adequate documentation controls.
- Assessment of the effectiveness of the interface between PCard software and other applicable financial and procurement systems; and
- Interviews with personnel involved in management of the program and customers utilizing the program.

Benchmarking

- **Benchmarking Services**

Benchmarking compares selected organizational practices, policies, structure or metrics against comparable public sector agencies, as determined by the client and consultant. The results of the benchmarking study can provide perspective and support for recommendations regarding policy revisions, staffing and organizational structure. Benchmarking is also a critical step in developing performance metrics.

Strategic Sourcing

- **Spend Management and Contract Portfolio Analysis**

Analysis of an organization's procurement spend to assist in the assessment, planning, and management for aggregation and execution of procurement events. Services include the contract portfolio analysis, data analytics, assessment, market analysis, and opportunity assessments with guidance and support in the procurement event execution. Analysis will also include recommendations on costs savings or revenue generating ideas and will be presented in short and long-term timeframes.

Performance Metrics and Measures

- **Analysis and Development of Procurement Performance Metrics and Measures**

Analysis of current procurement performance metrics and recommendation for new metrics to address organizational needs, stakeholder expectations and industry standards.

Compliance

- **Contract Audit**

A comprehensive review of contract files for general contract compliance with applicable federal, state and local procurement regulations. Review including small dollar purchases, informal and formal procurements for all procurement sourcing methods. A cross-section of goods, services, and professional services procurements are reviewed for a multitude of compliance elements and are also compared to industry best practices. A formal report provided, along with recommendations for improvement in practice, procedure and alignment with industry best practices.

- **Procurement Performance Audit**

Comprehensive review of the procurement function for compliance with applicable federal, state and local procurement regulations and procedures. A formal report of audit findings and recommendations for future compliance consistency.

Additional Services:

- Review and Development of Terms & Conditions, Solicitation Templates
- Procurement and end user satisfaction surveys
- Vendor satisfaction surveys
- Award and Accreditation Application Assistance

SKILLS SETS AND PROCUREMENT KNOWLEDGE OF THE CONSULTING AND STAFF AUGMENTATION TEAM

All NIGP Senior Consultants, Consultants and Staff Procurement Specialists possess extensive experience (average of over 20 years in the public procurement sector), skills and knowledge in public procurement areas. As certified (most possessing multiple professional certifications in public procurement), former Chief Procurement Officers and senior level staff, as well as instructors and content developers in the industry, all team members have extensive levels of expertise in ALL areas of public procurement. With over 100 public sector clients, our team members are required to be extensively well-informed in industry best practices, and how to apply them to consulting engagements and staff augmentation support services.

Tab C and Tab E speak further to our extensive experience in public procurement, however, the following sections focus on particular areas of technical expertise by our team members for the identified “Deliverable Topics” outlined in RFP Exhibit B:

Public Sector Procurement Sourcing:

Our team is experienced in all areas of public sector sourcing methods for goods, services, design and construction services (including alternative delivery methods for construction). Sourcing method experience includes Invitation for Bids, Request for Proposals, Request for Qualifications, Request for Quote and similar competitive sourcing processes. For each sourcing methodology, team members are fully versed and experienced in the various processes, procedures and industry best practices including:

- Collaboration with customer to identify and define need, collect appropriate documentation and data for proper sourcing.
- Leveraging of additional sourcing support tools, including Request for Information processes, market research of applicable industries/markets.
- Analysis and identification of proper sourcing method based upon desired goals and objectives, market conditions.
- Specification development based upon industry standards, including design, performance and combination specifications, including scope of work development to optimize competition and reduce competitive barriers.
- Analysis of competitive sourcing exemptions or competitive limitation issues such as brand name, qualified product lists, sole source, emergency situations.
- Identification and analysis of potential sources of supply, identification of industry challenges/issues that could impact/impede competitive process, cooperative contracting opportunities.
- Procurement planning, including development of expectations, determination of key milestones in scheduling, go/no decision points and related dependencies in the procurement process.

- Development of solicitation templates, terms and conditions specific to the defined need inclusive of analysis of the six areas of risk assessment.
- Solicitation publication, marketing, industry sourcing research, establishment of sourcing events/schedule, monitoring of solicitation interests, addressing inquiries, addressing external and internal stakeholder inquiries during competitive process.
- Facilitation of the full sourcing process, including pre-proposal/pre-bid conferences, solicitation amendments, protests, interviews, demonstrations, reference checks, clarifications and other related sourcing assessment activities.
- Solicitation negotiations, Best and Final Offers, as well as negotiation of post-contract modifications via contract amendments.
- Contract formation & award, including appropriate order of precedence documentation, and including collaboration and coordination of necessary executive/political approvals, presentations.

Public Sector Regulations, Policies and Requirements:

Our team is extensively qualified in interpretation of and compliance with statutory regulations across all types of government entities, including states, counties, cities, universities, school districts, special districts, airports and others. The team is experienced in working with all types of state and local legislation, regulations and policies that impact the manner in which procurement is conducted by a given entity. As such, our team is experienced and well-versed in conducting procurement through their research and appropriate application of federal, state and local grant funds, special funds, special regulations and local practices. Our team is experienced in working with a large variety of funding entities at the Federal and State level, including entities such as the Federal Transit Administration, Housing and Urban Development, and the Federal Highway Administration. The team has experience with Federal, State and local audits, the Federal Acquisition Regulations, and the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR Part 200).

While we recognize this cooperative contract may be utilized by any entity, within any state, we respect and appreciate the focal point for State of Texas and SHARE entities. As such, we have experience working with the following State of Texas regulations and policies:

- 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

Public Procurement Program Development and Management:

All consultants and staff augmentation team members are current or former public procurement professionals. Working within their entities, as well as based upon their extensive experience working with over 100 public sector clients, team members have both developed and managed numerous public procurement programs. Programs range from those focused on creating greater diversity in the supply chain, to those programs focused on specific areas of procurement services, such as Procurement Card (PCard) and Contract Administration support. Program experience includes, but is not limited to:

- Procurement Card (PCard)
- Contract Administration
- Auction and Surplus
- Professional Training and Staff Development Services
- Disadvantaged Business Enterprise, including Minority, Women, Veteran-owned
- Cooperative Procurement

The team has broad experience working with entities, political leaders and communities to develop programs based upon socio-economic priorities, legislative mandates and environmental priorities. This includes development of policy, procedures, reporting tools and community engagement for topics such as increasing diversity of the supplier community, implementing policies focused on increased environmental responsibility, increased opportunities for disadvantaged businesses, and programming focused on contracting under a living wage.

Procurement of Construction Related Services

While previous sections have spoken to the experience and expertise of the team across all goods, services, design and construction acquisitions, it bears noting that contracting for construction related services is a unique field of skill and expertise. Many of our team members have been focused on contracting in the area of construction services, including the alternative procurement delivery methods of construction (APDMs). Some of our team have been actively engaged in developing and helping to pass legislation in states that permit ADPMs, and are instructors and subject matter experts in the construction contracting field. These team members have authored content and textbook material for the procurement construction contracting industry and serve as adjunct professors, teaching the material to the next generation of procurement professionals.

Cooperative Procurement Program Development and Management:

NIGP Consulting and the individual team members are highly experienced with the cooperative procurement industry, cooperative contracts and cooperative procurement programming. Team members have built cooperative programs, cooperative portfolios, have created and negotiated hundreds of cooperative contracts, and have worked with thousands of cooperatively awarded contacts. Team members possess the experience and skill set to leverage this cooperative contract to its fullest potential.

The NIGP Consulting Team is extensively experienced in working with a wide variety of key cooperative procurement programs. Many team members have served as lead agencies for cooperative contracts, have marketed cooperative contracts and have served as cooperative experts on panels, at procurement conferences and other speaking engagements. Team members are considered, within the cooperative industry, as public sector experts, featured in articles, on radio interviews and through other digital platforms. Following are some, but not all of, the cooperatives the team has experience working with:

- OMNIA Partners (including former US Communities and TCPN)
- Sourcewell
- NASPO ValuePoint
- BuyBoard National Purchasing Cooperative
- TIPS
- HGAC
- GSA
- Numerous states and locally-based cooperative programs throughout the US

True Public Procurement Expertise

The NIGP Consulting Program team members are considered some of the top procurement thought leaders in the industry. Team members are highly recognized public procurement professionals, representing some of the highest achievements in the public service industry. They are Albert H Hall Fellows of Public Procurement, they are subject matter experts who have developed the industry's best practices, they are highly sought-after keynote speakers, they are celebrated researchers and authors and they are recognized industry experts.

Team members are experts who have developed course content, authored textbooks and teach regularly on the following topic areas (list is not all inclusive):

- Procurement Transformation
- Strategic Procurement
- Legal Procurement
- Specification and Scope of Work Development
- World Class Public Procurement Practices
- Sourcing Methodologies
- Internal and External Stakeholder Relationship Management
- Coordinate and Facilitate Stakeholder Meetings
- Procurement Planning and Market Research
- Cost & Price Analysis
- Competitive Negotiations
- Contract Administration
- Procurement Internal Controls
- Procurement Policy Development

Responses to Specific RFP Questions:

In addition to the information provided thus far, as well as in other sections of the RFP, NIGP Consulting offers specific responses to the following questions posed in the RFP:

What is your experience in the industry?

Our team of consultants and staff augmentation specialists possess, on average, over 20 years of experience in public sector procurement. Experience of the team includes public sector experience with over 100 state agencies, counties, cities, school districts, universities, airports, special districts, towns and much more. Our team serve, and have previously served, as Chief Procurement Officials, Procurement Managers, Procurement Directors, Chief Financial Officers, Procurement Contract Officers, and many other procurement positions. Team members have built and transformed procurement operations across North America. They have written, spoken, taught and led the industry in all procurement areas.

Additional information regarding experience in the industry is reflected in the other portions of the response, specifically:

- Tab C: Consultant and Staff Augmentation biography summaries, credentials and past project experience
- Tab E: Project References

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

NIGP Consulting Team members are active practitioners, who work regularly in all aspects of the public sector's procurement needs, including commodities, services, design and construction. They have experience working with various technology/systems which provide registration to suppliers interested in notification of opportunities, such as S2G, BidNet, Public Purchase and other similar notification services. Further, the team is well versed in how to research industries, to identify potential sources of supply. Finally, because of their extensive reach into the public procurement industry, team members have a broad network of resources available to them thru NIGP in entities throughout North America. This network of resources includes access to over 17K professionals, supplier information through NIGP and access to subject-matter expertise in thousands of areas of the supply chain. Team members also work closely with internal stakeholders to leverage their internal subject matter expertise in various markets.

What services do you provide throughout the process?

NIGP Consulting provides support and services in all areas of public procurement and in all areas of the procurement process. Our previously noted Portfolio of Services defines specific service offerings; however, custom offerings are readily available upon request.

In regard to support thru the procurement process, the Staff Augmentation team provides support in the following areas (list is not exhaustive):

- analysis and processing of purchase requisitions
- developing specifications, scopes of work
- determining proper sourcing method
- determining appropriate terms and conditions
- risk assessment
- facilitating sourcing processes, pre-solicitation conferences, inquiries and responses, solicitation amendments
- facilitating sourcing events: interviews, demonstrations, clarifications
- supplier research, outreach, diversity and engagement
- calls, meetings, emails or other communications related to each sourcing process
- contract negotiations, contract award and purchase orders
- contract administration, including change orders, contract amendments, supplier performance and issue resolution
- contract disputes and terminations

While some limitations may be imposed by a specific client (such as a client that prefers staff augmentation only engage in the externally facing activities), NIGP Consulting is able to provide full-service support, from identification of a client need, through contract closeout.

Our services include engagement with internal customers (clients), external customers (suppliers), entity leadership (supervisors, managers, executives, political body) and the community (chambers of commerce, special interest groups). Our services include presentations, reports, inquiries and other activities that may be made necessary based upon the services requested. Services may also include advisory/guidance services upon request.

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

NIGP Consulting will work with each client to identify the desired level of engagement for each client, determining a level of engagement that best supports the clients' needs. This will include the level of staff autonomy, key contacts, roles, responsibilities, approval levels, systems and tools to be utilized, specific training requirements, reporting cadence and any activities related to the defined role. For those entities that desire for NIGP Consulting to manage the staff augmentation role more fully, a reporting structure will be established with the client, such that appropriate levels of approval and updates can be defined with the entity, as well as the political body (if applicable). A Project Manager or Project Sponsor will be defined for the entity for each client.

Each staff augmentation engagement will be fully defined in a contract agreement. This agreement will be the basis for the engagement, including capturing the defined staff roles, responsibilities, schedules, work products, reviews and related activities under the engagement. Regular reviews will be conducted between the staff and the entity Project Manager/Sponsor.

How will you manage and secure NCTCOG and client data?

To ensure a successful collaboration in this cooperative contract, NIGP Consulting will view NCTCOG and SHARE as our partners in the success of this cooperative contract. As such, we intend to establish a market and communications plan for the cooperative contract, focused on maintaining regular communication with our partners. NIGP Consulting will maintain all key cooperative contract data in a database, including all potential client interactions related to the cooperative contract. Data to be tracked will include entity name, service area of interest, proposal submittal, status of potential client interest (inquiry, proposal, award/non-award, price, schedule), contract status (pending, awarded, declined, cancelled, completed), final sales amount and administrative fee. Quarterly reports on the cooperative contract activity will be provided to NCTCOG, unless an alternative reporting timeline is desired.

NIGP Consulting intends to leverage this cooperative contract at all our procurement-industry events, which includes attendance and speaking engagements at conferences, NIGP chapter events, other collegial association events and thru all social media and digital campaigns.

PRIMARY POINT OF CONTACT:

Designate specific contact person(s) for the following phases: (1) bid process (2) contracting process (3) contract administration (primary point of contact for receiving orders from Participating Entities):

The primary point of contact for all services desired under the cooperative contract, is:

Program Manager/Primary Point of Contact

Marcheta E. Gillespie, FNIGP, CPPO, C.P.M., CPPB, CPM

President of NIGP Code & Consulting

mgillespie@nigp.com/mgillespie@periscopeholdings.com

(520)940-7194

Examples of Consulting Teamwork Product

Attachment A provides examples of a few work products created by some of the Consulting and Staff Augmentation team members. In addition to the work product samples, we provide a list of some of our former and current clients, reflecting the diverse range of public service entities our consultants are experienced working with. This background and experience speak to the broad skillset and range of knowledge of our consulting and staff augmentation team.

- Alachua County, FL
- Anchorage School District, AK
- Arlington County, VA
- Atlanta Housing Authority, GA
- Austin School District, TX
- CalOptima Integrated Health Services, CA
- Cecil County, MD
- City of Annapolis, MD
- City of Austin, TX
- City of Sunrise, FL
- City of Dallas, TX
- City of Denton, TX
- City of Gainesville, FL
- City of Garland, TX
- City of Hamilton, ON
- City of Kirkwood, MO
- City of Long Beach, CA
- City of Miami Beach, FL
- City of Milwaukee, WI
- City of North Miami Beach, FL
- City of Orlando, FL
- City of Palo Alto, CA
- City of Pittsburgh, PA
- City of San Antonio, TX

- Contra Costa County, CA
- Columbus City Schools District
- DC Public Schools
- Fairbanks North Star Borough, AK
- Golden Gate District Authority
- Houston County, TX
- Howard County, MD
- Imperial Irrigation District, CA
- Lee County, FL
- Long Beach Port Authority, CA
- Loudon County, VA
- Manatee County, FL
- Maricopa County, AZ
- Mecklenburg County, NC
- Milwaukee County, WI
- Montgomery County, OH
- New Braunfels Utility District
- Norfolk Public Schools, VA
- Orange County, CA
- Pima Community College, AZ
- Prince George County, MD
- Sarasota County, FL
- Seminole County, FL
- Snohomish County, WA
- St. Louis County, MO
- St. Mary's Metro County Commission, MD
- State of Illinois Capital Board
- State of Maine
- State of Maryland
- State of Michigan
- State of Nevada
- State of Oregon Treasury
- State of Washington
- Suffolk County, NY
- Town of Hollywood, FL

The NIGP Consulting program is truly unique in its single-minded purpose and tight focus on the advancement of public sector procurement. All of our clients are public procurement organizations and each of our consultants has hands-on experience performing critical procurement and contracting functions within public sector organizations – across a broad spectrum of governmental entities. With a public sector focus, NIGP Consulting is accustomed to the complexities of reviewing procurement legislation and adhering to the policies in place.

A key to our success is our understanding that every public organization has a unique culture. As a consulting team, we gather information on the goals of the organization or key sponsor for the engagement as well as the culture of the organization. From this assessment, we are able to provide specific best practice procurement and contracting recommendations for the organization to assist in their transformation. Additionally, our previous NIGP Consulting work represents a wide variety of complexities, media interest, reorganizations, politically sensitive environments, extreme pressure from upper management and elected official involvement. Regardless of the type of organization, the environment or organizational culture, our proposed consultant team members have consistently met the challenges at hand and provided recommendations that helped organizations achieve their goals.

Agreement to Proposed Terms and Conditions:

NIGP Consulting accepts the terms and conditions identified under the RFP. PHI maintains insurance types and levels consistent with the requirements of the State of Texas and as identified under this RFP. PHI agrees to the requirements related to the cooperative contract, including the administrative fee of 2% and the contract reporting requirements.

GENERAL PROJECT APPROACH

To provide a sense of how projects are managed and approached by NIGP Consulting, the following information provides an outline of the highly successful project approach utilized for every engagement. While each client and engagement is unique, NIGP Consulting leverages a standard project management approach to all our projects to ensure a higher degree of accountability, professionalism and success for our projects. Our team of NIGP Consultants and Staff Augmentation service providers work closely with the entity to ensure an effective project kickoff, regular project reviews and successful conclusion and closure to the project.

Project Methodology – Phase I

Each NIGP Consulting engagement is grounded in a comprehensive understanding of the principles of public procurement and recognizes that each public procurement organization possesses a unique organizational culture with its own set of attributes and challenges. Our proven, four-phased methodology will allow us to work hand-in-hand with the entity to meet, address and assist the entity with a recommendations report to make its policies, processes, procedures and systems more effective.



Preparation: Our first phase starts with the coordination between the NIGP Lead Consultant and the entity's Project Manager to obtain the relevant documents for the services identified, including the appropriate procurement staff to be involved in the engagement. During this period, our Consultants will review legislation, ordinances, and the entity's current procurement policy and procedures to gain a solid understanding of the entity's current practices.

Data Collection: The second phase consists of phone calls, on-site or virtual meetings between the entity and the Consultants to discuss the scope of the project and to conduct with meetings with executives, customer/end user departments, key partner departments (such as finance, budget and legal) and procurement staff to discuss procurement practices and activities. These discussions play an important part in providing a thorough understanding of the entity's current environment, and key goals and objectives in the development of the desired end state.

Analysis: The third phase involves assessing and evaluating all data collected and defining gaps in existing processes as well as areas for improvement and alignment with industry best practices. All recommendations are intended to help the entity move forward in refining the current procurement strategies and practices and introduce new strategies and practices for the future state. The Analysis phase will also include detailed analysis of the current state as well as defining a potential future state of the defined procurement processes.

Report/Deliverable Generation: This final phase includes the development of a draft report incorporating all recommendations as well as a correlating draft action plan. The final phase will also include all deliverables identified in the client Statement of Work, including any process mapping, GAP analysis, presentations and proposed future state. All recommendations will incorporate consideration of the ABA Model Procurement Code, guiding principles and best practices of public procurement, effective leveraging of technology for procurement strategies and standardization of processes. The report will identify and document current state, identify needs/GAP analysis, and provide recommendations for the proposed future state. An initial draft of the report is provided to the entity for comment and feedback. The entity's feedback is then taken into consideration for final editing, with delivery of all final deliverables by the established deadline.

Targeted Scope of Work Areas to be addressed:

NIGP Consultants will work with the entity to determine the full set of processes and procurement areas to be assessed during reviews as well as to be provided for under any staff augmentation engagement. Areas of services to be reviewed and/or incorporated may include:

- Customer Needs Identification
- Requisitioning
- Solicitation development, issuance and evaluation
- Purchasing sourcing methods
- Contract award and execution
- Contracts management and administration
- Workflow management and approvals

The Consultants and entity will hold a Project Kick-Off Call and finalize a complete list of procurement areas for the review and/or for staff augmentation services.

PROJECT UNDERSTANDING

A sound, well-organized procurement program rests on a base or foundation of procurement policies, regulations and procedures. These form the basis for maintaining a procurement program that is fully transparent, so that all stakeholders possessing an interest in the program are aware of the approach for spending taxpayer funds and the processes involved across all types and methods of procurements.

NIGP Consulting stands ready to assist the entity in leveraging its extensive breadth and depth of public procurement expertise to move the entity to a more robust, more effective, more efficient and more mature future state procurement operation. As such, a large part of becoming a more strategic partner within an organization is ongoing monitoring of best practices and continuous improvement of policies, programs, and processes. Our certified public procurement practitioners, leaders in the field of public procurement, have also lived and executed in some of the most advanced procurement operations. Through their direct experience and expertise in public procurement, we fully comprehend the needs and goals of the entity based upon its stated scope of services.

Through a collaborative approach with the entity, the NIGP Consulting Program will conduct the defined services based upon a comparison to and alignment with applicable laws (based upon the entity type, inclusive of state and local regulations), industry best practices and industry standards. Through the service offering, gaps and opportunities will be identified, strategies for improvement will be presented and deliverables will be provided to enable the entity to take the appropriate next steps. NIGP Consulting will develop and deliver a final report inclusive of recommendations intended to help the entity meet its future goals.

METHOD OF APPROACH TO REQUESTED SERVICES

Based on our practical knowledge and experience of public procurement and based upon our understanding of the requested services necessary to achieve the objectives for the project by the entity, NIGP Consulting has developed a detailed plan and approach for a successful transformation. The overarching project framework consists of the following components:

Project Management

Management of the project plan

A project plan will be developed and refined with the entity to include all agreed upon key deliverables, deliverable dates and events. This will be done in coordination with the entity Project Manager. NIGP Consulting and the entity Project Manager will discuss any needed revisions to the project plan and will regularly monitor the plan during project updates. The project plan will be used for the weekly project report updates and to ensure successful accomplishment of the scope of work on schedule and within the established compensation.

Management of the project team

The NIGP Consulting Team will include a Senior Lead Consultant who will serve as the lead of the project and who will work directly with the entity Project Manager. NIGP Consulting will work with the entity Project Manager to establish the team of entity stakeholders who will assist throughout the project. Key entity stakeholders will be included in various events throughout the project, including mapping activities and on-site interviews

Management of data and activities

After completion of any interviews and mapping activities, the NIGP Consulting Team will meet with the entity Project Manager and any other necessary entity personnel to further enhance and validate their understanding from data gathered and documented in the mapping sessions. These meetings will ensure that the NIGP Consulting Team has accurately recorded the Current State information in order to properly analyze and provide future recommendations.

Management of communications

The NIGP Consulting model has been successful largely because of our commitment to strong communication with our clients. This begins at the very outset of the project (immediately after the Notice to Proceed is given), when our Senior Lead Consultant will coordinate activities with the entity Project Manager. Regular team meetings will be held with the entity team to ensure consistent communications and updates throughout the project. Team meetings will be held every two weeks or at another agreed upon schedule by the entity and the NIGP Consulting Team.

Project Activities

Project Kick Off

Upon successful contract execution, the NIGP Consulting Team will immediately begin working with the identified entity Project Manager to begin developing the detailed project plan. A project Kick Off meeting will be scheduled as early as possible at the start of the project schedule. The meeting is planned to be remote, however, upon the request of the entity can be executed onsite. The Kickoff meeting will discuss the planned approach to development of the project plan, the project schedule, the project team and to set project expectations. A Kickoff agenda will be coordinated with the entity.

Preparation, Research and Data Collection

The Preparation, Research and Data Collection phase will entail close coordination between the NIGP Senior Lead Consultant and the entity Project Manager, to assemble all relevant data and documentation from the entity, as well as to research all applicable laws and regulations at the Federal, State and entity level affecting the procurement function. The NIGP Senior Lead Consultant will submit a detailed listing of documentation required for the research and preparation phase. The NIGP Consulting Team will thoroughly review all gathered data and documentation to prepare for on-site interviews and mapping sessions.

The NIGP Consulting Team will review all entity's policies, procedures, processes, technology solutions and relevant data from all procurement service areas (including sourcing for goods, services, design and construction, contract administration, receiving, invoice processing and other related procurement service areas). The review shall include, at a minimum, the following types of documents, data and systems:

- Ordinances, statutes, procurement policies, procedures and administrative manuals for alignment with industry best practices and American Bar Association Model Procurement Code and Regulations.
- State legislation that impacts the entity.
- Regulatory constraints that may impede efficiency.
- Business processes from identification of need/requisition through procurement methods/strategies to contract administration, to include vendor registration, to identify potential efficiencies, standardizations, clarifications of roles and responsibilities and enhanced customer service opportunities.
- Procurement and procurement-process related systems and technology and the degree to which they are being maximized to support the existing procurement program and provide recommendations in support of the proposed legal and processes recommendations.

On-Site Interviews

The NIGP Senior Lead Consultant will coordinate with the entity Project Manager to coordinate on-site interviews of internal and external procurement stakeholders. These face-to-face meetings will allow the NIGP Consulting Team to validate their understanding of all the information gathered and reviewed. The interviews further allow the NIGP Consulting Team to discover and understand the nuances of the entity's procurement processes, organizational structure, challenges, and customer perspectives. If needed, follow-up calls with specific individuals to ensure that all questions are answered and that we capture the necessary, critical information. The On-Site interviews will be 4 days, timing of which will be coordinated in the project schedule with the entity Project Manager.

Analysis and Revision

Upon completion of the above phases, the NIGP Consulting Team will conduct an extensive analysis of all data collected, mapping documents of the current state to define gaps, inconsistencies, inefficiencies and areas of opportunity for alignment with industry best practices. A detailed GAP analysis document of recommendations and opportunities, as well as a high-level outline of options of available eProcurement functionality available in the market.

Draft Report and Final Report Deliverable

This final phase includes the development of a draft report incorporating all the following:

- Recommendations related to policy, procedure, process, system, data and service delivery
- Detailed documentation of the Current State
- Summary information of available procurement functionality in the market
- Documented GAP analysis where inefficiencies, inconsistencies exist in the Current State
- Draft action plan with recommendations for the proposed future state.

All recommendations will incorporate consideration of the ABA Model Procurement Code, guiding principles and best practices of public procurement, effective leveraging of systems/technology for procurement strategies and standardization of processes and data. All recommendations will be geared toward helping the entity move forward in refining the current procurement strategies and practices and introducing new strategies and practices for the future state. An initial draft of the report will be provided to the entity for comment and feedback. The entity's feedback is then taken into consideration for final editing, with delivery of the final report by the established deadline in the project plan.

ATTACHMENT A

SAMPLES OF CONSULTANT WORK PRODUCTS

Following are samples of work products from consulting engagements, as well as staff work products for augmentation support:



Terry McKee, IT & Procurement Director
901 N. Broadway • Knoxville, TN 37917-6699
865.403.1133 • Fax: 865.594.8858
procurementinfo@kcdc.org
www.kcdc.org

Request for Proposals

Solicitation Name and Number	Card Operated Laundry Services Q2116
KCDC's Procurement Division must receive your response no later than	11:00 a.m. on March 12, 2021 (as KCDC's clocks indicate)
Deliver Responses to	procurementinfo@kcdc.org
Electronic Copies	Use the MS Word version posted on KCDC's website (or other electronic means) to provide a typed response. The final proposal is to be submitted in Adobe format.
Questions About This Solicitation	Submit questions to procurementinfo@kcdc.org by 6:00 p.m. on March 9, 2021. <u>KCDC will not accept questions via telephone.</u>
Open Records/Public Access to Documents	All document provided to KCDC are subject to the Tennessee Open Meetings Act (TCA 8-44-101) and open records requirements.
Check KCDC's webpage (https://www.kcdc.org/procurement/) for addenda and changes before submitting your response	

General Information**1. Background and Intent**

- a. Knoxville's Community Development Corporation (KCDC) is the public housing and redevelopment agency for the City of Knoxville and for Knox County in Tennessee. KCDC's housing property portfolio includes 17 properties with approximately 3,500 dwelling units. KCDC also administers approximately 3,958 Section 8 Vouchers and 82 Moderate Rehabilitation units. Other activities of KCDC include management of 9 LIHTC properties, administration of development and redevelopment projects for local governments and several related business activities.
- b. KCDC uses "supplier" as inclusive of various words describing interested parties often called "supplier," "bidders," "contractors" and "suppliers."
- c. Several of KCDC's properties have "Coin Operated" laundry machines for their residents. KCDC's current award to Caldwell & Gregory has nearly reached the end of its five-year maximum and thus the services must be resolicited.
- d. The purpose of this solicitation is to make an award to one supplier for providing these laundry machines at KCDC's sites.

2. Changes After Award

It is possible that after award KCDC will need to revise the service needs or requirements specified in this document. KCDC reserves the right to make such changes after consultation with the supplier. Should additional costs arise, the supplier must document increased costs. KCDC reserves the right to accept and negotiate these charges.

3. Contact Policy

Contact only KCDC's Procurement Division about this solicitation from the issuance of this RFP until its award. Information obtained from any other person will not affect the risks or obligations assumed by the supplier or relieve the supplier from fulfilling any of the conditions of the resulting award. Such contact can disqualify the supplier from the solicitation process.

4. Contact Personnel

A good working relationship must develop between KCDC and the successful supplier. The supplier will provide a contact(s) to handle billing inquiries and service-related issues. In the event the usual contact is unavailable, the supplier will notify Human Resources of the change.

5. Contract Length

KCDC anticipates the length of the contract will not exceed 60 months.

6. Damage

The supplier is responsible for all damage to buildings, equipment, grounds, premises and all other types of potential damage resulting from the provision of the services requested herein.

Scope of Work**14. Introduction and Objectives**

KCDC's main interest is to provide quality machines and service to KCDC tenants. The machines must be easy to use, reliable and energy efficient. The successful supplier will be responsible for obtaining, installing, maintaining and repairing the machines. The machines will be on a laundry card system that that will use credit cards or laundry cards. A laundry card dispenser will also be needed for the laundry room with an online portal to monitor sales.

15. Charges

KCDC wants the supplier to recommend a cost per load for both washing machines and dryers. Currently however, the charge is \$1.25 per load.

- a. KCDC does not anticipate increasing cost to users during the period of the contract but reserves that right upon a written request from the successful supplier. The supplier shall not increase prices for washing and drying from initial set prices without KCDC's approval.
- b. The supplier is responsible for the settlement of any claims and reimbursements to users for non-performance of equipment.

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16. Communication

For its convenience, KCDC often communicates via email. Accordingly, the successful supplier will routinely use email. Additionally, many KCDC staff members using "Texting" to communicate and the supplier needs to be proficient in this communication tool. Finally, some KCDC staff members use the telephone frequently and the supplier must be able to effectively communicate that way also.

17. Equipment

- a. Used equipment is not acceptable.
- b. Front loading washing machines are required.
- c. There will be a maximum of 48 hours to convert equipment at each building. Installations may be scheduled back-to-back at the various sites. KCDC will require a two-week notice prior to the installation. KCDC and the supplier must agree prior to the exchange of machines.

Solicitation Document C: HUD Form 5369A

**Representations, Certifications,
and Other Statements of Bidders**
Public and Indian Housing Programs

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1. Certificate of Independent Price Determination

(a) The bidder certifies that--

(1) The prices in this bid have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other bidder or competitor relating to (i) those prices, (ii) the intention to submit a bid, or (iii) the methods or factors used to calculate the prices offered;

(2) The prices in this bid have not been and will not be knowingly disclosed by the bidder, directly or indirectly, to any other bidder or competitor before bid opening (in the case of a sealed bid solicitation) or contract award (in the case of a competitive proposal solicitation) unless otherwise required by law; and

(3) No attempt has been made or will be made by the bidder to induce any other concern to submit or not to submit a bid for the purpose of restricting competition.

(b) Each signature on the bid is considered to be a certification by the signatory that the signatory--

(1) Is the person in the bidder's organization responsible for determining the prices being offered in this bid or proposal, and that the signatory has not participated and will not participate in any action contrary to subparagraphs (a)(1) through (a)(3) above; or

(2) (i) Has been authorized, in writing, to act as agent for the following principals in certifying that those principals have not participated, and will not participate in any action contrary to subparagraphs (a)(1) through (a)(3) above.

[Insert full name of person(s) in the bidder's organization responsible for determining the prices offered in this bid or proposal, and the title of his or her position in the bidder's organization];

(ii) As an authorized agent, does certify that the principals named in subdivision (b)(2)(i) above have not participated, and will not participate, in any action contrary to subparagraphs (a)(1) through (a)(3) above; and

(iii) As an agent, has not personally participated, and will not participate in any action contrary to subparagraphs (a)(1) through (a)(3) above.

(c) If the bidder deletes or modifies subparagraph (a)2 above, the bidder must furnish with its bid a signed statement setting forth in detail the circumstances of the disclosure.

☒ [Contracting Officer check if following paragraph is applicable]

(d) Non-collusive affidavit. (applicable to contracts for construction and equipment exceeding \$50,000) in Solicitation Document B attached

(1) Each bidder shall execute, in the form provided by the PHA/IHA, an affidavit to the effect that he/she has not colluded with any other person, firm or corporation in regard to any bid submitted in response to this solicitation. If the successful bidder did not submit the affidavit with his/her bid, he/she must submit it within three (3) working days of bid opening. Failure to submit the affidavit by that date may render the bid nonresponsive. No contract award will be made without a properly executed affidavit.

(2) A fully executed "Non-collusive Affidavit" [] is, [] is not included with the bid.

2. Contingent Fee Representation and Agreement

(a) Definitions. As used in this provision:

"Bona fide employee" means a person, employed by a bidder and subject to the bidder's supervision and control as to time, place, and manner of performance, who neither exerts, nor proposes to exert improper influence to solicit or obtain contracts nor holds out as being able to obtain any contract(s) through improper influence.

"Improper influence" means any influence that induces or tends to induce a PHA/IHA employee or officer to give consideration or to act regarding a PHA/IHA contract on any basis other than the merits of the matter.

(b) The bidder represents and certifies as part of its bid that, except for full-time bona fide employees working solely for the bidder, the bidder:

(1) [] has, [] has not employed or retained any person or company to solicit or obtain this contract; and

(2) [] has, [] has not paid or agreed to pay to any person or company employed or retained to solicit or obtain this contract any commission, percentage, brokerage, or other fee contingent upon or resulting from the award of this contract.

(c) If the answer to either (a)(1) or (a)(2) above is affirmative, the bidder shall make an immediate and full written disclosure to the PHA/IHA Contracting Officer.

(d) Any misrepresentation by the bidder shall give the PHA/IHA the right to (1) terminate the contract; (2) at its discretion, deduct from contract payments the amount of any commission, percentage, brokerage, or other contingent fee; or (3) take other remedy pursuant to the contract.


3. Certification and Disclosure Regarding Payments to Influence Certain Federal Transactions (applicable to contracts exceeding \$100,000)

(a) The definitions and prohibitions contained in Section 1352 of title 31, United States Code, are hereby incorporated by reference in paragraph (b) of this certification.

Solicitation Document G Revenue Proposal

Detail the revenue sharing plan by indicating:

1. Percentage going to KCDC.
2. Any deductions from "revenue."
3. All costs to KCDC.
4. Any "bonus" money going to KCDC for signing with your company.
5. Cost per load for washers and cost per load for dryers.
6. The run time for a drying cycle.
7. Detail your plan for the monthly accounting of review with a representative from KCDC's management staff.
8. Detail your "space improvement" fee proposal. Note that KCDC expects a minimum of \$1,500.

	CITY OF NORTH CHARLESTON PROPOSAL	Project Number: Date: Procurement Official: Phone: E-Mail Address:	NC-15-21 May 10, 2021 Denise Badillo, CPPB, CPPO Director of Procurement (843) 740-5899 dbadillo@northcharleston.org
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DESCRIPTION: Worker's Compensation Medical Services

The Term "Offer" Means Your "Bid" or "Proposal".

SUBMIT OFFER BY: June 24, ~~2021~~ 10:00 AM - (See "Deadline for Submission of Offer" provision)

QUESTIONS MUST BE RECEIVED BY: June 14, ~~2021~~ by 4:00 PM - (See "Questions from Offeror" provision)

NUMBER OF COPIES TO BE SUBMITTED: One original unbound (1) Six copies (6) and one (1) electronic file - (See " Submitting Bids" provision)

Offers must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior.

SUBMIT YOUR SEALED OFFER TO:
CITY OF NORTH CHARLESTON
PROCUREMENT DEPARTMENT
Attention: Denise Badillo, CPPB, CPPO
PO Box 190018
2500 City Hall Lane
North Charleston, SC 29419
See "Submitting Your Offer" provision

CONFERENCE TYPE: N/A DATE & TIME: As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions		LOCATION:	
AWARD & AMENDMENT S	The award, this solicitation, and any amendments will be posted at the following web address: http://www.northcharleston.org/Business/Do-Business-with-North-Charleston/Request-for-Qualifications.aspx It is the responsibility of the offeror to check for amendments.		
You must submit a signed copy of this form with Your Offer. By submitting a bid or proposal, you agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of ninety (90) calendar days after the Opening Date.			
NAME OF <u>OFFEROR</u> (Full legal name of business submitting the offer)		OFFEROR'S TYPE OF ENTITY: (Check one) <input type="checkbox"/> Small (15 employees or less) <input type="checkbox"/> Women <input type="checkbox"/> Minority <input type="checkbox"/> Other (See "Signing Your Offer" provision.)	
AUTHORIZED SIGNATURE (Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above.)			
TITLE (Business title of person signing above)			
PRINTED NAME (Printed name of person signing above)	DATE SIGNED		
Instructions regarding Offeror's name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the offeror above. An offer may be submitted by only one legal entity. The entity named as the offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, i.e., a separate corporation, partnership, sole proprietorship, etc.			

INTRODUCTION

The City of North Charleston is seeking proposals from experienced, reputable, and properly licensed physicians or medical facilities to provide certain medical services in connection with employments matters.

This solicitation seeks proposals responding to the Scope of Work for **Workers' Compensation Medical Services**. This solicitation does not commit the City of North Charleston to award a contract, to pay any costs incurred in the preparation of applications submitted, or to procure or contract for the services. The City reserves the right to accept or reject any, all or any part of any proposal received as a result of this Solicitation, or to cancel in part or in its entirety this Solicitation if it is in the best interest of the City to do so. The City shall be the sole judge as to whether proposals submitted meet all requirements contained in this solicitation.

This Request for Proposal (RFP) is not a bid. Price will not be the determining factor for award. The City reserves the right, in its sole discretion, to reject all submissions, reissue a subsequent RFP, terminate, restructure or amend this procurement process at any time.

It is the intent of the City to negotiate with the most advantageous, qualified company or entity based on information obtained through this RFP process and award a single Contract for its Workers Compensation Medical Services.

INSTRUCTIONS TO OFFERORS:

UNAUTHORIZED COMMUNICATIONS

Respondents' contact regarding this RFP with employees or officials of the City of North Charleston will result in disqualification from this procurement process. Any oral communications are considered unofficial and non-binding with regard to this RFP. The only authorized contacts for this procurement are any designated Procurement staff.

DEADLINE FOR SUBMISSION OF OFFER: Any proposal or offer received after the Procurement Director or his designee has declared that the time set for opening has arrived, shall be rejected unless the offer has been delivered to the designated purchasing office or the governmental bodies' mail room which services that purchasing office prior to the proposal opening.

PROPOSAL PREPARATION

All proposals should be complete and carefully worded and must convey all the information requested by the City of North Charleston. If significant errors are found in the Offeror's proposal, or if the proposal fails to conform to the essential requirements of the RFP, the City, and the City alone, will be the judge as to whether that variance is significant enough to require rejection of the proposal.

Evaluation Criteria		
Item #	Evaluation Factor	Total Possible Points
01	Experience and Qualifications of the proposer to provide the services contained in this RFP	25
02	Understanding of the Scope of Work and capabilities to perform scope of work being requested	25
03	Implementation and Project Management	20
04	Record Keeping/Reporting	20
05	Cost/Fees	10
TOTAL POSSIBLE POINTS		100

Percentages		
Rating	Description	Percentage
Superior	Criteria was addressed in a superior manner. Response demonstrates superior capability, experience, and understanding of the project.	100%
Above Average	Criteria is addressed well. Response is above average and demonstrates complete capability, experience, and understanding of the project.	80%
Average	Criteria is adequately addressed. Response demonstrates a basic capability, experience, and understanding of the project.	60%
Below Average	Criteria is only partially addressed. Response demonstrates some capability, experience, and understanding of the project.	40%
Poor	Criteria is addressed only minimally. Response demonstrates little capability, experience, or understanding of the project.	20%
Unsatisfactory	Criteria is not addressed. Response fails to demonstrate capability, experience, or understanding of the project.	0%

Evaluation Information

All proposals will be reviewed for purposes of determining responsiveness and proposer responsibility. Any proposal that does not meet the essential requirements of the RFP and the City will be deemed non-responsive. To determine responsibility, all information provided by the proposer concerning its capability to perform fully the contract requirements, including the integrity and reliability of the proposer, will be reviewed.

The submission of a proposal for review does not necessarily qualify the proposer as responsible or the proposal as being responsive. Failure to provide specific information as requested, for use in the evaluation, will cause the proposal to be deemed non-responsive which will disqualify the proposal from further review.

SUBMITTAL FORM – COST INFORMATION

(The number corresponds to the number in the section titled Scope of Minimum Services to be Provided)

NOTE: Where the term "estimated annual cost" is used herein, it refers to the actual number of units times the unit cost. No adjustments to unit costs will be made during the contract term.

SECTION 1: ON-THE-JOB INJURIES – ACCIDENTS	
Discount off SCWCC Fee Schedule	
Itemized Costs Breakdown	TOTAL COST
<p>Medical treatment for on-the-job injuries</p> <p>Quote a standard global percentage discount off of the SC Workers' Compensation Commission's published fee schedule that will be applied to each CPT code.</p> <p>If quoting State Fee Schedule, enter 0%.</p> <p>(Contact Risk Management Division regarding all reported on-the-job injuries. Submit all authorized charges to the City's workers' compensation carrier. No authorized services should be charged to the employee.)</p> <p>Return to work evaluations for on-the-job injuries \$ _____</p> <p>Disallowed charges (No cost to the employer. These charges shall be the responsibility of the employee. The employee may submit a claim to his/her insurance carrier for consideration.) \$ <u>0.00</u></p> <p>Weekly Individual Status Report \$ _____</p> <p>After Clinic Hours Care \$ <u>0.00</u></p>	<p>\$. A Discount off SCWCC Fee Schedule</p> <p>_____ %</p>
Total Cost for On-The-Job Injuries - Accidents	\$ _____

NOTE: It is requested that the above requirements are itemized as well as priced as one exam.

1.

COST SUMMARY FOR ON-THE-JOB INJURIES - ACCIDENTS	
% Discount off SCWCC Fee Schedule for Medical Treatment for On-the-Job Injuries	_____ %

GENERAL TERMS AND CONDITIONS

OFFEROR RESPONSIBILITY

The offeror is the entity that is proposing or offering to perform work or supply service(s) and/or material(s) to the City. Each offeror shall fully acquaint itself with conditions relating to the scope and restrictions attending the performance of obligations under the conditions of this solicitation or agreement. The omission of an offeror to acquaint itself with existing pre-contract conditions or post-contract consequences shall in no way relieve such offeror of any obligation with respect to the proposal or to any contract resulting from a solicitation or agreement. Offerors are notified that failure to inspect, familiarize or otherwise gather information as to the total cost to the City will, in addition to any and all other remedies available, create cost difference liabilities and claims against the ultimately successful contractor. Offerors shall notify the City of all costs reasonably expected.

BID/PROPOSAL/AGREEMENT CONSTITUTES OFFER

By submitting a bid/proposal or agreement, the offeror agrees to be governed by the terms and conditions as set forth in the solicitation document or proposed agreement and the City Procurement Code and Regulations. Any bid or proposal response or proposed agreement containing variations from the terms and conditions set forth herein may, at the sole discretion of the City, render such bid or proposal or agreement non-responsive. Any inconsistencies between the solicitation and any other contractual instrument shall be governed by the terms and conditions of the solicitation or proposed agreement, except where subsequent amendments to any contract resulting from the award are specifically agreed to in writing by the parties in order to supersede any such provisions of the solicitation or other contractual document.

SPECIFICATIONS MANDATORY

The offeror must meet all of the mandatory specifications and requirements set forth in the solicitation or proposed agreement. By incorporating said specifications into the offeror's response, subject to acceptance by the City of any amendments hereto as submitted by the offeror, the offeror is agreeing to comply with said solicitation specifications or agreement. Failure to provide mandatory evidence of capability will result in a low evaluation ranking of the offeror's bid/proposal. Items designated as evaluation factors will be evaluated and rated in accordance with the evaluation criteria, if applicable.

INQUIRIES

Every effort has been made to ensure that all information needed by an offeror is included herein. If an offeror finds that it cannot provide a response without additional information, it may submit written questions to the person designated herein on or before the deadline set forth in the solicitation. Questions shall not be accepted by the City after the specified date. All replies to questions will be in writing and contained within an addendum. When a question received by the City is found to be previously and sufficiently addressed in the solicitation, that question will be returned to the proposer with a reference to the part of the solicitation containing the answer. All questions and written replies will be answered in the form of an addendum and will be regarded as a part and parcel of the solicitation.

AMENDMENTS OR ADDENDA



Advertise Date: Thu, April 01, 2021

City of Fort Myers Procurement Services

Choose from Below:			
Solicitation No.:	0009-21		
Solicitation Name:	Yacht Basin Development		
Pre-Submittal Meeting:			
Type:	No Meeting Scheduled at This Time		
Location:	Choose a Location from Below:		
Date:		Time:	
Question Deadline:			
Location:	Planetbids Electronic Q & A		
Date:	Wed, April 14, 2021	Time:	10:00 am. Eastern
Submittal Deadline:			
Location:	Planetbids Portal Electronic Submission		
Date:	Wed, May 05, 2021	Time:	2:00 pm.
Procurement Contact:	Denise Finn	Title:	Procurement Manager
Phone:	(239) 321-7232	Email:	dfinn@cityftmyers.com
Requesting Department:	Community Development - CDD		

All solicitation documents are available for download at Planet Bids @
<https://www.planetbids.com/portal/portal.cfm?CompanyID=31333>

Revised 1/9/2020

RFP 0009-21 Yacht Basin Development

PROPOSAL CONDITIONS

SECTION II – EVALUATION

1. **EVALUTION PROCESS.** Proposals will be reviewed by a selection committee comprised of City employees. The City staff may or may not initiate discussions with Firms for clarification purposes. Clarification is not an opportunity to change the proposal. Firms shall not initiate discussions with any City employee or official.
2. **CRITERIA FOR EVALUATION AND AWARD.** The City will evaluate three (3) categories of information: responsiveness, responsibility, the technical proposal/price. All proposals must meet the following responsiveness and responsibility criteria.
 - a. **Responsiveness:** The City will determine whether the proposer complies with the instructions for submitting proposals including completeness of proposal which encompasses the inclusion of all required attachments and submissions. Late proposals will not be accepted. Failure to meet other requirements may result in rejection.
 - b. **Responsibility:** The City will determine whether the proposer is one with whom it can or should do business. Factors that the City may evaluate to determine “responsibility” include, but are not limited to: excessively high or low priced proposals, past performance, references (including those found outside the proposal), compliance with applicable laws, proposer’s record of performance and integrity – e.g. has the proposer been delinquent or unfaithful to any contract with the City, whether the proposer is qualified legally to contract with the City, financial stability and the perceived ability to perform completely as specified. A proposer must always have financial resources sufficient, in the opinion of the City, to ensure performance of the contract and must provide proof upon request. City staff may also use Dun & Bradstreet and /or any generally available industry information. The City reserves the right to inspect and review proposer’s facilities, equipment and personnel and those of any identified subcontractors. The City will determine whether any failure to supply information, or the quality of the information, will result in rejection.
 - c. **Technical Proposal:** The City will determine how well proposals meet its requirements in terms of the response to the specifications and how well the offer addresses the needs of the project. The City will rank offers using a point ranking system (unless otherwise specified) as an aid in conducting the evaluation.
 - d. If less than three (3) responsive proposals are received, at the City’s sole discretion, the proposals may be evaluated using simple comparative analysis instead of any announced method of evaluation, subject to meeting administrative and responsibility requirements.

RFP 0009-21 Yacht Basin Development

For this RFP, the criteria will be evaluated, and their relative weights are:

Evaluation Criteria	Points
Property Development Experience Provide a concise description of your firm's experience, expertise, and qualifications in similar property development, including the experience and financial stability for project scope development and analyses, project administration and management, and administration/oversight.	25
Financial Capacity of the Firm Describe how your firm is financially capable of completing the plan described. Provide proof of financial stability	30
Key Personnel Qualifications & Experience <ul style="list-style-type: none"> • Provide an organization chart of the proposed project team and clearly indicate the role of each member of the proposed project team. • Firm must identify staff member that will serve as Project Director who shall be authorized and responsible to act on behalf of the Consultant with respect to directing, coordinating, and administering all aspects of the services to be provided and performed. • State the experience and qualifications of the Program Manager(s) and Project Manager(s) assigned to this project. • Ensure that each reference provided clearly indicates the Key Personnel from the proposed project team organizational chart that participated in the contract, and their respective role in that contract. • Provide a written statement committing to use the staff members in the capacity as shown in the organizational chart for this project, with no substitutions unless written approval is provided by the City. Changes to the staffing after contract award without the written approval of the City may result in cancellation of the contract. 	20
Project Approach Provide a clear description of your firm's approach and unique abilities to provide the scope of services as described herein. Project Approach should include, but not be limited to: <ul style="list-style-type: none"> • How your firm intends to generally approach the scope of services, including a comprehensive representation, demonstrating an understanding and a commitment of how your firm intends to implement and fulfill the requirements of the scope of services. • How your firm will balance staffing needs for this contract. • How your firm will facilitate timely completion of the project. • Describe unique abilities, innovative approaches, and/or special considerations. 	25
TOTAL POINTS	100

REQUEST FOR PROPOSAL

SECTION V

1. BACKGROUND

The City of Fort Myers, incorporated on March 24, 1886, is in Lee County, Florida and has a staff of approximately 1000 employees serving a population of approximately 93,000 permanent residents. The City encompasses approximately 50 square miles. The City functions as a Council / Manager form of government.

Thomas Edison was one of Fort Myers' early inhabitants and a formational figure in the City's development. Fort Myers became known as "The City of Palms" as a result of Edison's deep respect for nature. Through his effort and determination, the royal palms lining historic McGregor Boulevard were imported and planted resulting in today's beauty and majesty. His best friend Henry Ford shared Edison's enthusiasm in Fort Myers and became a homeowner and frequent visitor. The history associated with Edison and Ford along with the building boom in the late 1800's and early 1900's left a legacy and history unique to Fort Myers. The cobblestone downtown and historic districts have retained much of their charm and proper preservation measures are in place to ensure that charm will be treasured for generations to come.

2. MINIMUM QUALIFICATIONS/REQUIREMENTS OF RESPONDENTS

Provide a concise description of your firm's experience, expertise, and qualifications in providing Development Services, including the experience and financial stability for project scope development and analyses, project administration and management, and administration/oversight.

Provide a maximum of three (3) references with contract details where your firm has provided similar services associated with above experience request. At least one (1) reference should be with a government entity.

- Reference information provided for each contract should include:
 - Contract name
 - Name of owner/client
 - Owner/client contact name, phone number, and email address (ensure contact information is accurate and that contact has knowledge of the project).
 - List Key Personnel and their roles involved in the contract. Identify those Key Personnel who are also listed in Criterion ____.
 - Total Capital Cost of the Programs/Projects managed.
 - Total cost of program management services provided.
 - Length of contract term, including start date and finish date.
 - Summary of work performed; a short description of services performed.

TAB E - REFERENCES

NIGP Consulting is pleased to offer the following three references for customers (public agencies) for whom we have provided similar service to the defined services requested in the RFP:

Client: County of Orange, CA – Public Works Department – Design and Construction Procurements (Phase 1); Central Procurement Office (Phase 2); Orange County Community Resources (Phase 3)

Year(s) Work Performed: 2019-2021

Description of Work Summary: NIGP Consulting was engaged by the County to execute a phased strategic procurement assessment and audit of several entities within the County, including Public Works, Central Procurement Office and Community Resources. The analysis under each engagement included a review of the organizational, operational and policy structure of the entity. The analysis included an onsite assessment component, extensive research and a final report of recommendations. Recommendations identified opportunities for policy improvement, process efficiencies and procurement maximization, organizational and staff improvements and a plan for successful implementation of proposed modifications. The County has actively been implementing recommendations from the reports.

Project Contact: Maria Pirona, County Procurement Officer: (714) 567-5177, maria.pirona@ocgov.com

Client: New Braunfels Utility, TX

Year(s) Work Performed: 2020 - 2021

Description of Work Summary: NIGP Consulting was engaged by New Braunfels Utility to conduct a procurement assessment of the entity, including a review and analysis of existing policy, procurement structure, practice and staffing. A final report was provided to the entity with recommendation for improvements. Based upon the report, the entity decided to proceed with a Procurement Transformation Project, to actively implement the recommendations. The planned procurement transformation project including staff augmentation services.

Project Contact: David Hubbard, Chief Administrative Officer, (830)629-8451, dhubbard@nbutexas.com

Client: San Joaquin Delta College

Year(s) Work Performed: 2021

Description of Work Summary: NIGP Consulting was engaged by San Joaquin Delta College to conduct a procurement assessment, including a review and analysis of existing policy, procurement structure, practice and staffing. A final report was provided to the entity with recommendation for improvements. In addition, the College engaged NIGP Consulting to provide staff augmentation support services, and staff advisory services. Augmented staff are facilitating sourcing processes and related procurement services.

Project Contact: Dr. Amanda Preston-Nelson, Vice President of Administrative Services, (209)954-5151 x5022, amanda.nelson@deltacollege.edu

TAB F – PRICE PROPOSAL

Price Proposal for Public Sector Procurement Consulting Services Rate Chart		NCT 2021-083
NIGP Consulting powered by Periscope Holdings Inc		
Item	Description	Hourly Rate
1.	Procurement Analyst	\$80/Hr
2.	Procurement Support Specialist	\$110/Hr
3.	Senior Procurement Support Specialist	\$140/Hr
4.	Procurement Consultant	\$200/Hr
5.	Senior Procurement Consultant	\$250/Hr
	Project Related Work: Specific projects under this contract are based upon the established level of efforts multiplied by the hourly rate(s) for the applicable positions. Projects are priced on a firm-fixed basis using the above rates.	Based upon above hourly rates

Note: All rates are for virtual/remote work. Travel related expenses are charged in addition to the defined rates for any work performed on-site at the request of the client. Travel related expenses include business class airfare, hotel accommodations, local transportation (rental car, travel services, etc), local parking, meals (based upon Federal per diem rates), parking at airport of departure, parking on site, bag fees and expenses directly related to travel to the entity's site.

**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):

Periscope Holdings Inc

Signature of Authorized Representative:

Christopher Kennedy

Date: 11/30/2021

**ATTACHMENT II:
CERTIFICATIONS OF OFFEROR**

Name of Organization/Contractor(s):

Periscope Holdings Inc

Signature of Authorized Representative:

Christopher Kennedy

Date: 11/30/2021

**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):

Periscope Holdings Inc

Signature of Authorized Representative:

Christopher Kennedy

Date: 11/30/2021

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):

Periscope Holdings Inc

Signature of Authorized Representative:

Christopher Kennedy

Date: 11/30/2021

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

The Periscope Holdings Inc (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 Periscope Holdings Inc (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):

Periscope Holdings Inc

Signature of Authorized Representative:

Christopher Kennedy

Date: 11/30/2021

**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):

Periscope Holdings Inc

Signature of Authorized Representative:

Christopher Kennedy

Date: 11/30/2021

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/None

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.

Not Applicable/None

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 x Christopher Kennedy
Signature of vendor doing business with the governmental entity

11/30/2021
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):

Periscope Holdings Inc

Signature of Authorized Representative:

Christopher Kennedy

Date: 11/30/2021

**ATTACHMENT VIII:
CERTIFICATION OF GOOD STANDING
TEXAS CORPORATE FRANCHISE TAX CERTIFICATION**

Pursuant to Article 2.45, Texas Business Corporation Act, state agencies may not contract with for profit corporations that are delinquent in making state franchise tax payments. The following certification that the corporation entering into this offer is current in its franchise taxes must be signed by the individual authorized on Form 2031, Corporate Board of Directors Resolution, to sign the contract for the corporation.

The undersigned authorized representative of the corporation making the offer herein certified that the following indicated Proposal is true and correct and that the undersigned understands that making a false Proposal is a material breach of contract and is grounds for contract cancellation.

Indicate the certification that applies to your corporation:

 X The Corporation is a for-profit corporation and certifies that it is not delinquent in its franchise tax payments to the State of Texas.

_____ The Corporation is a non-profit corporation or is otherwise not subject to payment of franchise taxes to the State of Texas.

Type of Business (if not corporation): ☐ Sole Proprietor

☐ Partnership

☐ Other

Pursuant to Article 2.45, Texas Business Corporation Act, the North Central Texas Council of Governments reserves the right to request information regarding state franchise tax payments.

Christopher Kennedy

(Printed/Typed Name and Title of Authorized Representative)

Christopher Kennedy
Signature

Date: 11/30/2021

**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:

Not Applicable

Authorized Signature

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:

Christopher Kennedy

NAME OF AUTHORIZED PERSON:

Christopher Kennedy

NAME OF COMPANY:

Periscope Holdings Inc

DATE:

11/30/2021

-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: _____



**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: Periscope Holdings Inc

SIGNATURE: Christopher Kennedy

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: Periscope Holdings Inc

SIGNATURE: Christopher Kennedy

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.

None

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: Periscope Holdings, Inc.

SIGNATURE: *Christopher Kennedy*

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

EXHIBIT A
Service Area Designation Forms

RFP 2021-083	Texas Service Area Designation or Identification				
Proposer Name:	Periscope Holdings Inc				
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			
	X - Will serve the entire State of Texas				
	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			
2.	High Plains	Amarillo Lubbock			
3.	Northwest	Abilene Wichita Falls			
4.	Upper East	Longview Texarkana, TX-AR Metro Area Tyler			
5.	Southeast	Beaumont-Port Arthur			
6.	Gulf Coast	Houston-The Woodlands-Sugar Land			
7.	Central Texas	College Station-Bryan Killeen-Temple Waco			
8.	Capital Texas	Austin-Round Rock			
9.	Alamo	San Antonio-New Braunfels Victoria			
10.	South Texas	Brownsville-Harlingen Corpus Christi Laredo McAllen-Edinburg-Mission			
11.	West Texas	Midland Odessa San Angelo			
12.	Upper Rio Grande	El Paso			

RFP 2021-083	Nationwide Service Area Designation or Identification Form						
Proposer Name:	Periscope Holdings Inc						
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>X - Will service all Fifty (50) States</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	X - Will service all Fifty (50) States	
Will service all Fifty (50) States	Will not service Fifty (50) States						
X - Will service all Fifty (50) States							
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		