



## PRE-PROPOSAL CONFERENCE AGENDA

Date: August 7, 2015
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Time: 2:00 pm
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### 1. Opening/Welcome:

Solicitation Number	RFP LAG0104REBID
Project Description:	INEDEPENDENT CONSUMER ADVOCATE FOR AE'S RESIDENTIAL & SMALL COMMERCIAL CUSTOMERS

### 2. Sign-in: All attendees shall sign in.

### 3. Introductions: Introduction of City staff. Attendees shall identify themselves and the company they represent.

### 4. Project Information: Explanation of Proposal closing date and time and the time for submission of the Compliance Plan, if applicable.

Closing Date	August 21, 2015
Time Proposals are Due	2:00 PM
Buyer's Name	Leslie Giannattasio

#### Submission of Offers: Review of Cover Sheet

- A. **Mailing:** Offers must be returned in a sealed envelope or container marked on the outside with the Offeror's name, address, solicitation number, and the closing date and time. Telegraphic or facsimile Offers **will not** be accepted. Address:

City of Austin  
Purchasing Office  
Municipal Building  
124 W. 8<sup>th</sup> St., Rm. 308  
Austin, Texas 78701  
(512) 974-2500

**Note: Responses not submitted in a sealed envelope or container will not be considered. Responses submitted late will not be considered. It is the responsibility of the Respondent to ensure that their Response is received before the Response closing time. There are no exceptions.**

### 5. General Solicitation Requirements: (Presented by Purchasing)

- A. Please remember that Sections 0100 (Definitions), 0200 Solicitation Instructions, and 0300 (Standard Purchase Provisions) are incorporated into this solicitation and subsequent contract by reference. These documents can be located on line at <http://www.austintexas.gov/department/standard-bid-documents>.

Section 0100, Purchase Definitions  
Section 0200, Solicitation Instructions

- B. Section 0300 Standard Terms and Conditions and Section 0400, Supplemental Terms and Conditions:

These two sections comprise the basis of all City contracts. It is important that you are aware of these terms and conditions and discuss them with the necessary parties within your firm and identify in your response any exceptions to these terms and conditions.

- C. Supplemental Purchase Provisions, Section 0400, these augment the Standard Terms and Conditions; they will be incorporated into any resultant Contract. Of note:

1. **Insurance:** Insurance is required for the resulting contract. Contractor shall provide a certificate of Insurance as Verification of coverages requires to the City, prior to contract execution and with 14 calendar days after written request from the City. Worker's Compensation and Employers' Liability Insurance, Commercial General Liability Insurance, Business Automobile Liability Insurance and Professional Liability Insurance.

2. **Term Of Contract:** The Term of Contract shall become effective on the date executed by the City (“Effective Date”) and shall remain in effect until the earliest of when the deliverables set forth in the Scope of Work are complete or the City terminates the Contract.
3. **Non-Collusion, Non-Conflict of Interest, and Anti-Lobbying:** From the moment that the solicitation was issued until the contract is executed, all communications regarding this solicitation must go to the Authorized Contact Person, Leslie Giannattasio. This requirement is necessary to maintain the integrity of the solicitation process and ensure that all proposers have the same opportunity. **Any representation to anyone else may result in the Offer being disqualified from consideration from award.**

D. **Questions:** All questions will be answered via an addendum posted on our website.

All requests for explanations or clarifications must be submitted in writing to the Purchasing Office no later than 2:00 pm on August 12, 2015. Submissions may be made via email to [Leslie.Giannattasio@austinenergy.com](mailto:Leslie.Giannattasio@austinenergy.com).

6. **MBE/WBE Procurement Program**, (Presented by SMBR – Harold Tolbert): This solicitation has no participation goals for subcontracting; however, please be advised that if you will be subcontracting any portion of this contract, you must comply with City’s MBE/WBE Procurement Program. Reference the No Goals Utilization Plan (Section 0900) included by reference in the solicitation for information on compliance requirements. Failure to comply with these requirements may result in rejection of your Response.

**\*Please utilize for your reference the MBE/WBE No Goal Solicitation Tip Sheet provided below as follows:**



## MBE/WBE Procurement Program No Goal Solicitation Tip Sheet

The City has determined that no goals are appropriate for this project. Even though no goals have been established for this solicitation, the Bidder/Proposer is required to comply with the City’s MBE/WBE Procurement Program, if areas of subcontracting are identified. Areas of subcontracting include services, supplies, or materials that the Bidder/Proposer does not perform with its own workforce or supply in its inventory. The following tips are suggestions that apply only to No Goal procurements.

### GENERAL INFORMATION

- ✓ Review the solicitation and determine whether subcontractors/subconsultants will be needed in order to submit a bid/proposal response. It is critical to contact the City as early as possible of subcontracting opportunities in order to meet requirements and timelines set out in the solicitation.
- ✓ If subcontracting opportunities are identified, contact SMBR immediately at 512-974-7600 to speak with the solicitation point of contact and obtain Good Faith Effort instructions. To request MBE/WBE availability lists, email SMBR at [SMBRComplianceDocuments@austintexas.gov](mailto:SMBRComplianceDocuments@austintexas.gov). Emails to SMBR should include:
  - Solicitation Number and Project Description in the subject line.
  - List of services, materials, or supplies that will be subcontracted (i.e. marketing services, auditing, copying, transformer, etc.).
  - Courtesy copy the Authorized Procurement Agent on all email communication with SMBR.
- ✓ Perform good faith efforts to obtain MBEs and WBEs as instructed by SMBR.
- ✓ Failure to comply with the MBE/WBE Procurement Program will result in the rejection of bids/proposals.
- ✓ The MBE/WBE Procurement Program requirements apply throughout the completion of the project when areas of subcontracting are identified.

### NO GOAL UTILIZATION PLAN

- ✓ Subcontractors/subconsultants identified by Bidders/Proposers should be listed on Form 0900 No Goal Utilization plan and submitted with the bid/proposal. The form can be found online by clicking the “Standard Bid Documents” tab at the City of Austin’s website in Vendor Connection. The link to the website is [https://www.ci.austin.tx.us/financeonline/vendor\\_connection/index.cfm](https://www.ci.austin.tx.us/financeonline/vendor_connection/index.cfm).
- ✓ Only City of Austin certified MBEs and WBEs will be counted, and must be certified for the scope of work they are listed to perform. This information can be found using the Certified Vendor Directory located on SMBR’s website at <http://www.austintexas.gov/smbr> (click on “MBE/WBE/DBE Certified Vendor” toward the bottom of the web page). Please contact SMBR if you experience any problems using the directory.
- ✓ Participation is calculated based on the entire amount of the bid or proposal. For Invitation for Bid (IFB) procurements, use the base bid amount to calculate participation.
- ✓ Attach good faith efforts if adding non-certified firms. Documentation is not limited to the following:
  - Copy of written solicitation
  - Emails, phone logs, fax transmittals
  - Correspondence with MBEs and WBEs
  - Copy of advertisement (social media or newspaper ad)
  - Copy of notices sent to Minority & Community Organizations
  - Documentation of contact with SMBR (phone or email)

**SMALL & MINORITY BUSINESS RESOURCES CONTACT INFORMATION**

**SMBR Main Office**

512-974-7600 ♦ 512-974-7601 Fax

Website: [www.austintexas.gov/smbr](http://www.austintexas.gov/smbr)

MBE/WBE Availability List Requests: [SMBRComplianceDocuments@austintexas.gov](mailto:SMBRComplianceDocuments@austintexas.gov)

**\*\*\*If you are going to subcontract ANY portion of this contract, you must contact the City’s Small and Minority Business Resources Department (SMBR) at (512) 974-7600 and follow the instructions in the No Goals Utilization Plan (Section 0900).\*\*\***

**7. Scope of Work** (Presented by the Department – Barksdale English)

## PURCHASING OFFICE MEETING SIGN-IN SHEET

RFP & Description: LAG0104REBID – Independent Consumer Advocate for AE's Residential & Small Commercial Customers

Meeting Date:  
8/7/2015 @ 2:00pm

Buyer: Leslie Giannattasio

Place/Room: TLC  
#100

Please Print Legibly

Name	Company/Agency/Dept.	Phone	Email
Leslie Giannattasio	City of Austin Purchasing	322-6583 512	leslie.giannattasio@austintexas.gov
Harold Tolbert Jr	COA SMBR	974-7736 512	harold.tolbert@austintexas.gov
Carrie Walker	Austin Energy	332-6335 512	Carrie.Walker@austintexas.gov
Barksdale English	Austin Energy	322-6314	barksdale.english@austintexas.gov
Keith Howardman	Oxford Advisors	—	—
Paul Cory	Oxford Advisors	—	7 via telephone