

**CITY OF AUSTIN
PURCHASING OFFICE
PROPOSAL PREPARATION INSTRUCTIONS AND EVALUATION FACTORS
SOLICITATION NUMBER: RFP 1100 EAL3001**

1. **PROPOSAL FORMAT**

Prefacing the proposal, the Proposer shall provide an Executive Summary of three (3) pages or less, which gives in brief, concise terms, a summation of the proposal. The proposal itself shall be organized in the following format and informational sequence:

- A. **Business Organization:** State full name and address of your organization and identify parent company if you are a subsidiary. Specify the branch office or other subordinate element which will perform, or assist in performing, work herein. Indicate whether you operate as a partnership, corporation, or individual. Include the State in which incorporated or licensed to operate.
- B. **Concept and Solution:** Define in detail your understanding of the requirement presented in the Scope of Work (Section 0500) and your solution to accomplish the work. Describe the factors that contribute to the effectiveness of your services. At a minimum include the following information:
- a. Describe your approach to reviewing Austin Energy's current ergonomic program and make recommendations for enhancements and improvements.
 - 1) What does your firm consider the top three to five most essential elements of a comprehensive and effective ergonomic program for an organization in our industry, and with a similar employee population? Provide an explanation for the importance of each of the elements that you select.
 - b. Discuss your approach to providing ergonomic assessments.
 - 1) Describe how you propose to structure the assessment in terms of registration process, consolidating the consultant's visits to each location, length of assessment.
 - 2) Describe how your firm would transition team members to work on the Austin Energy account to ensure adherence to confidentiality, safety, security, and other Austin Energy requirements.
 - 3) Explain how your firm typically incorporates recommendations for improvements, e.g., start with the employees who are most at risk for injury, start with the location with the largest group of employees, roll out all recommendations at once?
 - 4) Outline how assessment and evaluation records will be kept and how confidential information will be handled.
 - 5) Provide information on how your firm proposes to track all of the steps involved in assessments and evaluations from beginning to end (e.g., what is recommended, did the employee practice the postures, did the employee request the purchase of recommended products to address the concerns, is the employee using the products consistently and correctly, how have the employee's actions resulted in increased comfort, less stress, fewer injuries?) If your firm tracks all of these steps, explain what method you use to coordinate the communications between your firm, your corporate customer, and your customer's employees, and what benefits have you observed. If you track fewer than the steps listed above, explain why, detail your process and indicate the benefits.
 - 6) Describe your firm's proposed role in marketing the services to Austin Energy employees, and your suggestions for how Austin Energy can assist.

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- 7) Outline how your firm will make recommendations for the purchase of furniture or related accessories that are brand-neutral.
- 8) Elaborate on your firm's practice to 1) recommend follow-up evaluations to all employees who have been assessed, 2) only do follow-up evaluations when requested by the employees, 3) only do follow-up evaluations in certain situations, or 4) some other method? If you select either of the last two methods, please elaborate.
- 9) Describe the reports your firm will provide to Austin Energy.

c. How will you provide training to Austin Energy employees?

- 1) Describe how you define a successful training program.
- 2) Provide suggested topics, and a brief description of each.
- 3) Explain your instructional methodology (e.g., interactive, lecture, small group discussion/problem solving, demonstrations, subject matter expert presenters, videos) and applicability to each suggested topic.
- 4) Describe how your firm proposes to provide ongoing ergonomic consulting services throughout the term of the Contract.
- 5) Include a list of potential topics that you would expect to address for this task.

C. **Work Plan:** Provide a detailed work plan for carrying out tasks related to your proposed solution. Include such time-related displays, graphs, and charts as necessary to show tasks, sub-tasks, milestones, and deliverables.

- 1) Provide a proposed schedule for delivering each component of services described in the Scope of Work.
- 2) Describe the tasks and schedule for reviewing and assessing Austin Energy's current ergonomic program.
- 3) Provide a communication plan that describes how services will be marketed to employees, how information will be communicated to employees about their assessments (e.g., written evaluations, handouts showing recommended postures, links to sites where employees can review how to perform the recommended techniques), schedule.
- 4) Provide a plan for assessing program effectiveness (e.g., track/analyze data sets, performance indicators, reduced injuries, customer satisfaction – both Austin Energy and employees), schedule.
- 5) Provide a training plan that includes description of each training class, length of class, number of students per class, student to teacher ratio, class format, schedule.
- 6) Provide a plan for ongoing consulting services.

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- D. **Project Management Structure:** Provide a general explanation and chart which specifies project leadership and reporting responsibilities; and interface the team with City project management and team personnel. If use of subcontractors is proposed, identify their placement in the primary management structure, and provide internal management description for each subcontractor.
- E. **Prior Experience:** Describe your firm and staff's experience providing services described in the Scope of Work to clients similar to Austin Energy. Describe only relevant corporate experience and individual experience for personnel who will be actively engaged in the project. Do not include corporate experience unless personnel assigned to this project actively participated. Do not include experience prior to 2008.
- i. Submit at least 3 complete and verifiable references. References shall consist of customers to whom the offeror has provided the same or similar services. Include: organization name; year(s) services were provided; brief description of services provided; and a valid reference name, title, address, phone number, and email address of a principal person who represents the organization and can speak to the services based on the involvement at the time of delivery. References shall indicate a record of positive past performance. The City at its discretion may check references in order to determine the Offeror's experience and ability to provide the services described in this Solicitation.
 - ii. Submit five samples of reports of assessments that you propose to provide to the Austin Energy project manager. If the samples reference actual clients, redact personally identifiable information. The samples should illustrate your firm's expertise in a variety of categories.
- F. **Personnel:** Include names and qualifications of all professional personnel who will be assigned to this project. State the primary work assigned to each person and the percentage of time each person will devote to this work. Identify key persons by name and title. Provide all resumes.
- G. **Local Business Presence:** The City seeks opportunities for businesses in the Austin Corporate City Limits to participate on City contracts. A firm (Offeror or Subcontractor) is considered to have a Local Business Presence if the firm is headquartered in the Austin Corporate City Limits, or has a branch office located in the Austin Corporate City Limits in operation for the last five (5) years, currently employs residents of the City of Austin, Texas, and will use employees that reside in the City of Austin, Texas, to support this contract. The City defines headquarters as the administrative center where most of the important functions and full responsibility for managing and coordinating the business activities of the firm are located. The City defines branch office as a smaller, remotely located office that is separate from a firm's headquarters that offers the services requested and required under this solicitation. Points will be awarded through a combination of the Offeror's Local Business Presence and/or the Local Business Presence of their subcontractors. Evaluation of the Team's Percentage of Local Business Presence will be based on the dollar amount of work as reflected in the Offeror's MBE/WBE Compliance Plan or MBE/WBE Utilization Plan. Specify if and by which definition the Offeror or Subcontractor(s) have a local business presence.
- H. **Service-Disabled Veteran Business Enterprise (SDVBE):** Pursuant to the interim Service-Disabled Veteran Business Enterprise Program, Offerors submitting proposals in response to an RFP shall receive a three point (3 percent) preference if the Offeror, at the same time the proposal is submitted, is certified by the State of Texas, Comptroller of Public Accounts as a Historically Underutilized Business and is a Service-Disabled Veteran Business Enterprise. This preference does not apply to subcontractors. To receive this preference, Offerors shall complete the enclosed Section 0840 Service-Disabled Veterans Business Enterprise Preference Form, in accordance with the Additional Solicitation Instructions included therein.

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- I. **Proposal Acceptance Period:** All proposals are valid for a period of one hundred and eighty (180) calendar days subsequent to the RFP closing date unless a longer acceptance period is offered in the proposal
- J. **Proprietary Information:** All material submitted to the City becomes public property and is subject to the Texas Open Records Act upon receipt. If a Proposer does not desire proprietary information in the proposal to be disclosed, each page must be identified and marked proprietary at time of submittal. The City will, to the extent allowed by law, endeavor to protect such information from disclosure. The final decision as to what information must be disclosed, however, lies with the Texas Attorney General. Failure to identify proprietary information will result in all unmarked sections being deemed non-proprietary and available upon public request.
- K. **Authorized Negotiator:** Include name, address, and telephone number of person in your organization authorized to negotiate Contract terms and render binding decisions on Contract matters.
- L. **Cost Proposal:** Information described in the following subsections is required from each Proposer. Your method of costing may or may not be used but should be described. A firm fixed price or not-to-exceed Contract is contemplated, with progress payments as mutually determined to be appropriate.
- i. Manpower. Itemize to show the following for each category of personnel with separate hourly rates:
 - (1) estimated hours for each category of personnel
 - (2) rate applied for each category of personnel
 - (3) total cost
 - ii. Itemize cost of supplies and materials
 - iii. Other itemized direct costs
 - iv. If applicable, general and administrative burden. Indicate base used, percentage, and total cost relative to this procurement.
 - v. Travel expenses. All travel lodging expenses in connection with the Contract for which reimbursement may be claimed by the Contractor under the terms of the Solicitation will be reviewed against the City's Travel Policy as published and maintained by the City's Controller's Office and the Current United States General Services Administration Domestic Per Diem Rates (the "Rates") as published and maintained on the Internet at:

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

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

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2. EXCEPTIONS:

State exceptions to the City’s Standard Purchase Terms and Conditions, Supplemental Purchase Provision, Scope of Work or any other part of the Solicitation. Include a full explanation of the reason for said exceptions, and include proposed language for any alternative term.

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

3. PROPOSAL PREPARATION COSTS:

All costs directly or indirectly related to preparation of a response to the RFP or any oral presentation required to supplement and/or clarify a proposal which may be required by the City shall be the sole responsibility of the Proposer.

4. EVALUATION FACTORS AND AWARD:

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

B. Evaluation Factors:

i. 100 points.

(1) Concept and Solution – (24 points)

(2) Work Plan – (20 points)

(3) Experience and Personnel – (20 points)

(4) Total Evaluated Cost – (23 points)

(5) Service-Disabled Veteran Business Enterprise Preference (3 points)

(6) LOCAL BUSINESS PRESENCE (Maximum 10 points)

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

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

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recommendations on that basis.