



Issue Date: October 31, 2023

SUBJECT: REQUEST FOR QUOTES (RFQ) FOR CENTRAL SERVICES COST ALLOCATION PLAN

The City of Gastonia Finance Department (City) invites qualified proposals for:

Central Services Cost Allocation Plan

Closing: Proposals shall be submitted electronically before 3:00PM EST, Tuesday 11/28/2023 by sending via email to Gina Merrell at gina.merrell@gastonianc.gov. All communications related to this RFQ shall be submitted to the same email address. It is the Responder's responsibility to allow sufficient time to complete and send electronically its proposal, including all documentation required by this RFQ, prior to the stated deadline. The transmitting email must have the following subject line: **RFQ for Central Services Cost Allocation Plan**

The City will only consider electronic proposals that have been transmitted successfully and issued an accepted response from the City as received. **Transmission of proposals by any other means will not be accepted.** Failure to successfully transmit an electronic proposal shall be at the Responder's sole risk and no relief will be given for late or improperly submitted proposals.

The City of Gastonia reserves the right to reject any proposal for failure to comply with all requirements of this notice or of any of the contract documents; however, it may waive any minor defects or informalities at its discretion. The City further reserves the right to reject all proposals or award a contract which, in its judgment, is in the best interest of the City.

Issuance of this RFQ and/or receipt of proposals does not commit City to award a contract.

Signed,

Purchasing Specialist
City of Gastonia
Garland Municipal Business Center
150 S. York Street, Gastonia, NC 28052
Website: www.cityofgastonia.com

10/31/2023

SUBJECT: REQUEST FOR QUOTES (RFQ)

SECTION I

INVITATION

The City of Gastonia Finance Department (City) invites proposals from qualified companies (Responders) for:

Central Services Cost Allocation Plan

Please read this entire RFQ package and include all requested information and forms in your proposal. Proposals must be signed by an authorized agent of the company submitting a proposal in order to be considered responsive.

Background:

Gastonia desires to contract with a qualified firm to prepare a Cost Allocation Plan that identifies overhead costs for the Water/Sewer, Electric, Solid Waste, Stormwater, and Transit enterprise funds. After the cost plan has been reviewed in draft and final versions, the consultant will be responsible for preparing excel worksheets showing the percent of each central service department that can be charged to each enterprise fund. The engagement will include at least one on-site visit to go over all methodologies and results with management.

Assuming a start date before January 1, 2024, the City desires a draft of the cost allocation plan by March 15, 2024, and a final plan and all supporting schedules to be completed by April 26, 2024.

Tentative RFQ Schedule

(Subject to change at City's discretion)

1. Issue RFQ.....10/31/2023
2. Written Questions from Responder Due.....3:00pm EST, 11/09/2023
3. Responses from City Due.....11/14/2023
4. Proposals Due3:00pm EST, 11/28/2023
5. Proposal Evaluation Completed.....12/04/2023
6. Contract Negotiations Begin.....12/05/2023
7. Contract Executed.....12/29/2023

SECTION II.

RFQ INSTRUCTIONS

A. Proposal Format

The proposal should provide the following information:

1. Describe your approach and the procedures followed in developing the cost allocation plan for Gastonia.
2. Identify the firm's managers and key staff members who would be assigned in the preparation of the plan. Describe their roles and provide a brief description of their professional experience.
3. Describe the experience, knowledge and training which your firm has in developing cost allocation plans.
4. Explain how you would plan to use City staff to assist you during the fieldwork.
5. Describe your firm's fee schedule. If you expect to incur expenses exclusive of the fees listed above, or if your fees are computed on a basis other than per calculation, please provide a listing of such expenses and fees.
6. Assure that timelines, as provided by the City, will be met.

B. Examination of Proposal Documents

By submitting a proposal, Responders represent they have thoroughly examined and become familiar with the work required under this RFQ, understand the project objectives or have asked questions to clarify the project, and are capable of performing quality work to achieve the City's objectives.

C. Addenda

Substantive City changes to the requirements will be made by written addendum. Any written addenda issued pertaining to this RFQ shall be incorporated into the terms and conditions of any resulting Purchase Order and/or Agreement. Copies of all Addenda will be furnished through the City's Procurement Office no later than 72 hours prior to the proposal Due Date and Time.

It is the sole responsibility of firms to ensure they have received all addenda prior to submitting a proposal. To this end, each Responder should contact the City's Purchasing Division prior to the proposal due date to verify receipt of all Addenda issued. Firms shall acknowledge receipt of all Addenda when submitting their electronic proposals.

D. Clarifications

1. Examination of Documents

Should a Responder require clarifications to this RFQ, Responder shall notify the City in writing in accordance with Section D.2 below. Should it be found that the point in question is not clearly and fully set forth in the RFQ, the City shall issue a written addendum clarifying the matter.

2. Submitting Requests

Firms shall submit all questions, clarifications or comments to Gina Merrell, Budget and Grants Administrator at gina.merrell@gastonianc.gov

3. City Responses

- a. Responses from the City will be communicated in writing by way of addendum in accordance with Section C above. The City shall not be bound to any modifications to or deviations from the requirements set forth in this RFQ as the result of any oral instruction.
- b. The Tentative Schedule may change at any time. Any and all changes to the Tentative Schedule will be made by way of addendum. If an Addendum is issued less than 72 hours before the proposal due date and time, the proposal due date will be extended.

E. Submission of Proposals

1. Date and Time

All proposals shall be submitted no later than **3:00PM EST on Tuesday, 11/28/2023.**

2. Electronic Submission

Proposals shall be submitted electronically by sending via email to Gina Merrell, at gina.merrell@gastonianc.org. It is the Responder's responsibility to allow sufficient time to complete and submit their proposal, including all documentation required by this RFQ, prior to the stated deadline. **Only electronic proposals will be accepted;**

hard copy proposals will be rejected as nonresponsive and returned unopened without exception.

3. **Acceptance of Proposals**

- a. The City reserves the right to accept or reject any and all proposals, or any item or part thereof, or to waive any informalities or irregularities in a proposal.
- b. The City reserves the right to withdraw this RFQ at any time without prior notice.
- c. The City makes no representations that any contract will be awarded to any Responder responding to this RFQ.

F. Proposal Withdrawal

Electronic proposals may be withdrawn by firm prior to the date and time set forth in Section E.1 above. After that time, firms may not withdraw their proposals for a period of ninety (90) days from the Proposal Submittal Deadline. At no time may the successful firm(s) withdraw their proposal(s).

G. Pre-Contractual Expenses

Pre-contractual expenses are defined as expenses incurred by the Responder in:

1. Preparing its proposal in response to this RFQ;
2. Submitting the proposal to City;
3. Negotiating with City on any matter related to the proposal; or
4. Any other expenses incurred by the Responder prior to date of award, if any.

The City shall not, in any event, be liable for any pre-contractual expenses incurred by respondent in the preparation of its proposal. The Responder shall not include any such expenses as part of its proposal.

H. Contract Award

Issuance of this RFQ and receipt of proposals does not commit the City to award a contract. The City reserves the right to postpone the proposal opening for its own convenience, to accept or reject any or all proposals received in response to this RFQ, to request additional information from firms as appropriate, to negotiate with other than the selected Responder(s) should negotiations with the selected Responder(s) be terminated, to negotiate with more than one Responder simultaneously, or to cancel all or part of this RFQ.

I. Contract Term

The initial contract term will be for seven months and is anticipated to be 1/1/2024 – 6/30/2024 with the option of a contract extension through 6/30/2026.

J. Acceptance of Order

The successful Responder(s) will be required to accept a Purchase Order and execute a written Agreement in accordance with and including as a part thereof the published notice of Request for Proposals and this Request for Proposals, including all requirements, conditions and specifications contained herein, with no exceptions other than those specifically listed in the written purchase order and/or Agreement.

K. Public Records

Responses (proposals) to this RFQ and the documents constituting any contract entered into thereafter become the exclusive property of the City and shall be subject to the North Carolina General Statutes 132-1. The City's use and disclosure of its records are governed by this law.

L. Special Provisions for Services

1. Accessibility. Responders shall be fully informed regarding any peculiarities and limitations of the spaces available for the performance of work under this contract. Responders shall exercise due and particular caution to determine that all parts of the work are made quickly and easily accessible.
2. Authority of the City of Gastonia. Subject to the power and authority of the City as provided by law in this contract, the City shall in all cases determine the quantity, quality, and acceptability of the work, materials and supplies for which payment is to be made under this contract. The City shall decide questions that may arise relative to the fulfillment of the contract or the obligations of the Respondent hereunder.
3. Changes in Work. The City may, at any time work is in progress, by written order and without notice to the sureties, make alterations in the terms of work as shown in the specifications, require the performance of extra work, decrease the quantity of work, or make such other changes as the City may find necessary or desirable. The Respondent shall not claim forfeiture of contract by reasons of such changes by the City. Changes in work and the amount of compensation to be paid to the Respondent for any extra work as so ordered shall be determined in accordance with the unit prices quoted.

4. Contract Incorporation. This contract embodies the entire contract between the City and the Respondent. The parties shall not be bound by or be liable for any statement, representation, promise, inducement or understanding of any kind or nature not set forth herein. No changes, amendments, or modifications of any of the terms or conditions of the contract shall be valid unless reduced to writing and signed by both parties. The complete contract shall include the entire contents of the RFQ solicitation, all addenda, all of Respondent's successful submittal, supplemental agreements, change orders, performance bond(s), and any and all written agreements which alter, amend or extend the contract.
5. Rejection of Work. Respondent agrees that the City has the right to make all final determinations as to whether the work has been satisfactorily completed.

M. Evaluation Criteria

The City is soliciting firms and/or individuals who have established knowledge and experience preparing a cost allocation plan with the services requested in this RFQ. The City will evaluate each proposal based on the following criteria:

- 1) Experience of Firm and Personnel
- 2) Value

Qualification of Firm – 80 points

- a. Strength and stability of the firm;
- b. Technical competence and experience of firm's firms in general providing similar services;
- c. Demonstrated knowledge of the scope of work required, capability of performing specific tasks outlined in the RFQ;
- d. Adequacy of staff to provide required services;
- e. Reputation of firm in providing similar services;
- f. Qualifications, education, technical competence, and experience of staff;
- g. Proposal demonstrates the following:
 - i. Describes the qualifications and experience of each proposed Respondent team member, including key areas of expertise of each team member, plus their anticipated level of participation for the proposed type of service.
- h. Evidence of successful completion of similar projects.

Value - 20 points

- a. The total fee will be judged for value and used as the basis of comparison between the proposals submitted.

N. Evaluation Procedure

An Evaluation Committee comprised of City staff will be appointed to review and evaluate all proposals received in accordance with the above criteria.

During the evaluation period, the City may do any or all of the following:

1. Generate a “short list” and conduct interviews with the top candidates;
2. Conduct on-site visits and/or tours of the candidates’ places of business; and
3. Conduct negotiations with the most qualified candidate(s).

Firms should be aware, however, that award may be made without Respondent visits, project visits, interviews, or further discussions or negotiations.

O. Award

City staff will submit a recommendation to the City Manager for consideration and approval of the proposal(s) evaluated by staff to be the most qualified for this project. The City anticipates making final selections and awards on or about December 29, 2023.