

**TOWN OF CARRBORO
NORTH CAROLINA**



REQUEST FOR PROPOSALS
**Disparity Study for
Contracting and Procurement**

Proposals Due: March 3, 2023, at 3:00pm Eastern Time

Disparity Study for
Contracting and Procurement Procedures

PROPOSAL SCHEDULE

(Note: The below dates are subject to change)

Advertisement Date	February 5, 2023
Last Date for Questions	February 24, 2023, at 12:00pm EST
Proposal Due Date	March 3, 2023, at 3:00pm EST
Proposed Contact Award Date	April 4, 2023

CONTRACTING AND PROCUREMENT PROCEDURES

ISSUE DATE: February 5, 2023

ISSUING DEPARTMENT: Carrboro Economic Development
301 West Main Street
Carrboro, NC 27510

Proposals will be received until 3:00 P.M., Eastern Time on March 3, 2023. The purpose and intent of the Request for Proposals (RFP) is to solicit proposals from qualified firms to provide a Disparity Study for Town of Carrboro Contracting and Procurement Procedures.

All inquiries concerning the Scope of Services, Proposal Submission Requirements, or Procurement Procedures should be directed to:

Jon Hartman-Brown, Director
Economic Development Department
Email: JHartman-Brown@CarrboroNC.gov
Telephone: (919) 918-7319

Proposals shall be mailed and/or hand delivered to the Town shown above, and the envelope shall bear the name and number of this Request for Proposals (RFP). It is the sole responsibility of the Proposer to ensure that his/her Proposal reaches the Town by the designated date and hour indicated above.

In compliance with this Request for Proposals and to all the terms and conditions imposed herein, the undersigned offers and agrees to furnish the goods and services described in accordance with the attached signed proposal.

Firm Name: _____ Date: _____

Contact Name: _____ Email: _____

Address: _____ Phone: _____

By: _____ Signature: _____
(Name Typed/Printed) (Signature in Ink)

INSTRUCTIONS TO PROPOSERS

For a proposal to be considered, it must be based on scope of services contained herein and must be a complete response to this RFP. One (1) hard copy Original, four (4) hard “copies” of the Original, and a copy of your Proposal on a flash drive or other digital format, shall be submitted to the Town. The original Proposal should be marked “Original”. The copies must consist of all documents that are included in the “Original” Proposal.

Proposals shall be limited to thirty (30) double-sided pages or less and must be signed by an authorized representative. Each Proposal should be bound in a single volume with all relevant documentation. The letter of introduction, section dividers, detailed Résumés, forms, and dividers are not included in this page limit. The Town may elect to require oral presentations after receipt and review of the proposals.

- 1. COMMUNICATION WITH PROPOSERS:** All communications between the Town and prospective Proposers shall be in writing. E-mailed questions will be accepted and can be sent to JHartman-Brown@CarrboroNC.gov. Any inquiries, requests for interpretation, technical questions, clarification, or additional information shall be directed to Jon Hartman-Brown, Economic Development Director, at the email address above. All questions concerning this RFP shall reference the RFP number, section number and paragraph.

Questions and responses affecting the Scope of Services will be provided to all Proposers by issuance of an Addendum. **All questions must be received by no later than 12:00 P.M., Eastern Time on February 24, 2023**

- 2. PROPOSAL DUE DATE:** Proposals will be received until 3:00 P.M., Eastern Time, on March 3, 2023. Proposals must be mailed, or hand delivered to:
Town of Carrboro
Attn: Finance Director
301 West Main Street
Carrboro, NC 27510

Proposals shall be duly marked and/or identified with Proposer name and address.

- 3. DISCREPANCIES AND OMISSIONS:** Should a Proposer find discrepancies in, or omissions from the documents, or should be in doubt as to their meaning, he/she should at once notify the Town, and a written Addendum may be issued. The Town will not be responsible for any oral instructions. Acknowledgment of any Addendum received shall be noted on the Addendum Acknowledgement Form included in the Proposal. In closing of a contract, any Addendum issued shall become a part thereof.

EQUAL EMPLOYMENT OPPORTUNITY

NON-DISCRIMINATION IN EMPLOYMENT

Proposer shall not discriminate against any employee or applicant for employment because of age, sex, race, creed, national origin, disability or on the basis of sexual orientation or gender expression/identity. Proposer shall take affirmative action to ensure that applicants are employed and that employees are treated fairly and legally during employment with regard to their age, sex, race, creed, national origin, disability or on the basis of sexual orientation or gender expression/identity. In the event Proposer is determined by the final order of an appropriate agency or court to be in violation of any non-discrimination provision of federal, state, or local law or this provision, this Contract may be canceled, terminated, or suspended in whole or in part by Town, and Proposer may be declared ineligible for further Town contracts.

QUALIFICATIONS AND SUBMISSION REQUIREMENTS

The Proposal must include all the information set forth in this RFP and should be organized and tabbed appropriately. Unnecessary elaborate brochures or other materials beyond those sufficient to present a complete and effective response to this solution are not desired and may be construed as an indication of the Proposer's lack of cost consciousness. Therefore, elaborate artwork, expensive paper, and bindings, etc., are strongly discouraged.

One (1) Original hard copy, four (4) hard copies of the original, and a copy of your proposal on a flash drive or other digital format shall be submitted to the Town.

Tab 1 – Signed Forms

This Tab should include the following forms and information.

Proposal Form

Addendum Acknowledgement Form

Tab 2 – Executive Summary

This Tab should provide a summary of the Proposer's understanding of the Scope of Services requested in this RFP and emphasize any unique aspects or strengths of the Proposal.

Tab 3 – Corporate Overview

This Tab should present an overview of the Proposer's organization and should include the firm's name, address, phone and fax numbers, firm history, email address and phone number of the firm's representative for the Proposal.

Tab 4 – Approach

This Tab should present the Proposer's approach to providing the services specified in this RFP. This Tab should describe the services to be provided, who will provide the services, how the services will be provided, etc. This Tab should also include a description of the project methodology and timeline for project completion, etc. The Proposer should also include in this Section its plan for managing the work requirements.

Tab 5 – Organization and Staffing

This Tab should present the Proposer's proposed organization structure and staffing chart showing specific job classifications, number of employees and full-time equivalent employees by position and reporting relationships. Résumés for all managerial and key personnel should be provided in sufficient detail to be able to determine the nature and depth of each individual's relevant experience. This Tab should also identify any of the required services that the Proposer intends to subcontract, if any, providing for each (i) the reasons for subcontracting, (ii) the proposed subcontractor's responsibilities, (iii) information identifying proposed subcontractor's name, location, relevant personnel, and experience, and (iv) a letter from the proposed subcontractor

indicating their agreement to perform this role.

Tab 6 – Qualifications and Experience

In this Tab, the Proposer should describe its track record in performing services comparable to those specified in this RFP, other information relevant to deciding as to the ability of the Proposer to perform these services, a list of all similar work performed by your firm over the past five (5) years. This list should include the name of each client, a client contact and telephone number, the size and Scope of Work provided, effective dates of the contract(s) with this client, and the annual contract amount.

Tab 7 – Conflict of Interest

In this Tab the Proposer should describe any involvement that your firm, its employees, or its owner(s) have that may constitute a conflict of interest or potential conflict of interest.

EVALUATION AND AWARD CRITERIA

Based on the evaluation criteria outlined below, all Proposals will be evaluated and scored by the Evaluation Committee designated by the Town. Written or oral discussions may be requested, at the Town's discretion, relating to individual proposals.

1. Evaluation Criteria

Proposals will be evaluated using the following criteria and points (with a total of 10 points):

- a. Experience in providing this type of service for this size organization – 1 point
- b. Public Sector Experience – 1 point
- c. Demonstrated ability to meet commitments requested in the RFP – 2 points
- d. Qualifications of staff to be assigned to this project – 1 point
- e. Specific plans and methodology for providing the proposed services – 1 point
- f. References from at least 3 similar clients – 1 point
- g. Completion Timeline (goal of before January 15, 2024) – 1 point
- h. Cost Proposal – 2 points

2. Award of Contract

The Town reserves the right to award to a single Contractor deemed to be fully qualified and best suited among those submitting proposals based on the evaluation factors. Cost will be considered but shall not be the sole determining factor. Once the proposals are ranked and the most qualified firm(s) are determined, the Town may conduct further negotiations, and/or request presentations from firm(s) to further assist in the clarification of information and selection process.

SCOPE OF SERVICES

This Scope of Services will become part of the contract between the Town and the Proposer. The Proposer hereby agrees to provide services and/or materials to the Town pursuant to the provisions set forth below.

- 1. PURPOSE AND BACKGROUND:** The Town of Carrboro is seeking ways to provide better racial equity within its procurement and contracting services.

The purpose of the RFP is to solicit proposals from qualified firms to conduct a Disparity Study of the Town's procurement and contractual awards in construction, goods, services, and architectural and engineering services for the past five-year period to determine the effectiveness of the current MWBE program, and recommend modifications and adjustments, if necessary, that are in compliance with law.

- 2. TOWN DESIGNATED REPRESENTATIVE:**

Jon Hartman-Brown, Director
Department of Economic Development
301 West Main Street
Carrboro, NC 27510
Phone: (919) 918-7319 Email: JHartman-Brown@CarrboroNC.gov

- 3. WORK REQUIREMENTS:** The Proposer shall determine the availability of ready, willing, and able minority and women-owned businesses to participate in the Town's contracts. The Proposer shall identify each discrete group or category of minorities to be evaluated that may be individually affected by the Town programs, and whether such group or category is currently identified by the Town programs. This assessment shall consider capacity as a component of being "able". While analyzing availability, the Proposer shall precisely define its measure of availability and explain how such availability was calculated. The target area of the study is the counties of Orange, Durham, Chatham, and Alamance.

The Town considers businesses that are ready, willing, and able to perform as those that can provide the required work or goods, and available to perform when solicited. The Proposer shall ascertain whether a statistically significant disparity exists between the availability of ready, willing, and able minority and women-owned businesses and the utilization of such firms in the Town's contracts (whether as prime contractors, subcontractors, or suppliers). The study will consider the past five (5) fiscal years (July 2017-June 2022) of procurement and contracting. Any statistical disparity finding must be well documented by quantitative data.

If evidence of discrimination exists, the Proposer shall assess the extent to which the effects of discrimination can be addressed through race and gender-neutral means and whether narrowly tailored, race and gender specific remedies would be effective. Where appropriate, the Proposer will make recommendations for alternative policy and program directions based on legally

defensible best practices. The results and recommendations will serve as a reference document in the creation of directives, standards, and practices. The Town will require that the Proposer provide a clear, organized, and succinct executive summary of the study, which may be easily referenced and used.

Final Report to the Town shall include at least the following:

- (a) Identify categories of contracts for goods, services, construction, and architectural and engineering services typically awarded, the number of contracts and dollar amounts spent in each category for fiscal years July 2017 – June 30, 2022.
- (b) Analyze contracting and procurement data and conduct utilization analysis of minority, women, and non-minority firms in the procurement of goods, services, construction, and architectural and engineering services.
- (c) Analyze the utilization and availability data to determine if disparity continues to exist.
- (d) Collect and analyze anecdotal information obtained from surveys, focus groups and/or Town Council meetings.
- (e) Provide monthly progress reports to designated program representative.
- (f) Make recommendations for programmatic changes, including enhancements, if necessary, to include staffing.
- (g) Prepare draft report and review with relevant project staff. Provide draft in an electronic format, preferably PDF.
- (h) Present report findings to the Carrboro Town Council. Provide final report in an electronic format, preferably PDF, and in printed form.

- 4. ADDITIONAL INFORMATION:** The Town's procurement, awarded contract information, and accounts payable records are maintained in the Finance Department.

ATTACHMENTS AND AFFIDAVITS

Attachment A

PROPOSAL FORM

In accordance with the Scope of Services, we submit the following cost proposal to the Town of Carrboro for RFP # _____ entitled _____.

TOTAL PROPOSED COST

\$ _____
(Please include itemized costs.)

The above Total Proposed Cost should be based on being awarded the entire project.

I certify that the contents of this proposal are known to no one outside the firm, and to the best of my knowledge all requirements have been complied with.

Authorized Signature: _____ Date: _____

Name: _____ Title: _____

Firm Name: _____

Attachment B

ADDENDUM ACKNOWLEDGEMENT

Receipt of the following Addendum is acknowledged:

Addendum no. _____ Date: _____

Addendum no. _____ Date: _____

Addendum no. _____ Date: _____

Addendum no. _____ Date: _____

Addendum no. _____ Date: _____

Signature: _____ Date: _____

Title: _____

Name of Firm: _____