



## Procurement Management Division

<b>Addendum #2</b>	<b>IT Contract Professional Services RFP #269-2015-060</b>
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To: All Prospective Service Providers

Date: July 15, 2015

Subject: Addendum #2 - IT Contract Professional Services, RFP #269-2015-060

Please note the specification changes/modifications below for the RFP.

Item #	Page #	Section #	Specification(s)	Change(s) Modification(s)
1	26	3.12.	Time Records	<p><b>Modification:</b>  <b>Section 3.12. is modified to read as follows to include the word “provide” in the first sentence:</b></p> <p><b>3.12. Time Records.</b>            The Service Provider shall provide access to an online portal for reviewing and approving weekly time cards. Access shall be granted to the individual(s) requested by the respective Department for each Supplement Agreement. Each Contractor shall be responsible for completing a weekly time card that accurately states the time billable to the City. Time may not be included on an invoice to the City unless prior approval via the online portal has occurred.</p>
2	37-39	6. Form 4	Pricing Worksheet	<p><b>Modification:</b>  <b>Form 4 is replaced in its entirety with the revised Form 4 included in Exhibit A.</b></p> <p>Service Providers are encouraged to note the revised Form 4 requires a Mark Up Percentage to be included for the Job Category “Other”.</p>
3	55	7., Exhibit A, Section 4.4.	Invoices	<p><b>Modification:</b>  <b>Subsection 4.4.3. is hereby added, to read as follows:</b></p> <p>4.4.3. Each invoice submitted by the Company shall include the following information for each Category:</p>

Item #	Page #	Section #	Specification(s)	Change(s) Modification(s)
				<ul style="list-style-type: none"> <li>• Pay Rate</li> <li>• Bill Rate</li> <li>• Mark Up Percentage</li> </ul>
4	9 31-32	1.6.13. 4.1.6.	Exceptions to the RFP	<p><b>Service Provider Question:</b> Is the City interested in receiving/reviewing the Service Provider's exceptions to the Sample Contract and Confidentiality and Non-Disclosure Agreement prior to the 7/29 due date? If so, what format would the City like to receive those in?</p> <p><b>Answer:</b> Any exceptions are required to be detailed in the Service Provider's proposal per Sections 1.6.13. and 4.1.6.</p>
5	11	2.5.	Submission of Proposals	<p><b>Service Provider Question:</b> Are all copies of the submitted proposal required to be signed by the Service Provider, as well as the original?</p> <p><b>Answer:</b> At a minimum, the original must contain completed/signed forms. The documents labeled copy should be a copy of the original. Wet ink signatures are not required on the copies, but a copy of the signed form should be included.</p>
6	12 7	2.5. 1.6.2.	Submission of Proposals  Trade Secrets and Personal Identification Information /Confidentiality	<p><b>Service Provider Question:</b> Is it possible for any contractor to obtain copies of other competitors' proposals "<i>once any trade secret issues have been resolved?</i>"</p> <p><b>Answer:</b> The City of Charlotte is a public entity, and as such, is subject to public information requests, in accordance with North Carolina State Statutes. Service Providers wishing to keep portions of their proposals "confidential" should also refer to Section 1.6.2. for further instructions on how to do so.</p>
7	14	3.2.	Charlotte Cooperative Purchasing Alliance	<p><b>Service Provider Question:</b> If a Service Provider has other contracts already in place with a CCPA registered Participating Public Agency, will the CCPA affect the Service Provider's ability to do business through its already established contracts?</p> <p><b>Answer:</b> CCPA registered Participating Public Agencies may participate in any CCPA contracts at their discretion. However, both Participating Public Agencies and any Service Providers they may already be under contract with should carefully consider the terms of any such pre-existing contract before utilizing a CCPA contract for similar services.</p>

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8	21-23	3.4.	Personnel Selection Process	<p><b>Service Provider Question:</b> The Service Provider Response expectation is very detailed, but what is the City response expectation?</p> <p><b>Answer:</b> Please see Sections 3.4.3., 3.4.4., and 3.4.5. of the RFP for the City's requirements during the Personnel selection process.</p>
9	21-22	3.4.1.	Request for Resumes Notification	<p><b>Service Provider Question:</b> Where will the bulk of the Contractors' services be performed?</p> <p><b>Answer:</b> For Services provided to the City, physical locations will vary by assignment, but will be located within or nearby the City of Charlotte. Specific details will be provided in each Request for Resumes Notification.</p> <p>Any Services provided to a Participating Public Agency will vary depending on the location of that particular agency.</p>
10	22 54	3.4.2. Section 7., Exhibit A., 4.2.	Service Provider Resume Response Expenses	<p><b>Service Provider Question:</b> Is the requirement for Candidates to live within a 100 mile radius of Charlotte mandatory if a Service Provider is able to relocate a Candidate that is selected to fill a position?</p> <p><b>Answer:</b> Service Providers are encouraged to consider Exhibit A – Sample Contract, Section 4.2., Expenses. The City is not required to pay for such travel expenses unless written approval is obtained from the City Point of Contact for the respective Supplement Agreement prior to the supplement starting. Service Providers are encouraged to provide any alternatives deemed beneficial in their proposal as a detailed exception.</p>

Item #	Page #	Section #	Specification(s)	Change(s) Modification(s)
11	24	3.7.	Administrative Fees	<p><b>Service Provider Question:</b> What is the purpose of the 'Administrative Fees', and why is it imperative for the Service Provider to pay the City a quarterly percentage?</p> <p>Does this fee apply to billed contractor expenses? Is the size of this fee % a determining factor in considering the award of the contract?</p> <p>What is the average administrative fee that vendors currently pay the City for participating in the CCPA? If this varies based on industry/amount of utilization, please provide details.</p> <p><b>Answer:</b> The administrative fee is a standard model used by many Cooperative Purchasing Agencies. The CCPA uses revenues from Administrative fees to operate the CCPA program, which includes, but is not limited to, a variety of activities including solicitation of various commodities, services, and technology goods and services, management of the program, reporting, and marketing of existing CCPA Contracts.</p> <p>Specific Administrative fees vary by Contract, as do additional rebates, if applicable. The minimum Administrative Fee is 1%, which is based off of total aggregate purchasing volumes across the City and ALL Participating Public Agencies for that respective contract. The Administrative Fee is required to be included on the Service Provider's Form 4, and cost effectiveness and value are a part of the Proposal Evaluation Criteria as detailed in RFP Section 5.</p>
	33	5.	Proposal Evaluation Criteria	
12	24	3.7.	Administrative Fees	<p><b>Service Provider Question:</b> Can the City provide a quarterly history of the 1% of overall CCPA Program spend?</p> <p><b>Answer:</b> This is the first time IT Contract Professional Services have been solicited under the Charlotte Cooperative Purchasing Alliance (CCPA). No data is available at this time.</p>
13	26	3.12.	Time Records	<p><b>Service Provider Question:</b> Would the City please clarify whether the City or the Service Provider provides the online portal for timekeeping?</p> <p><b>Answer:</b> The Service Provider is required to provide the online portal. Please see Item #1, above.</p>

Item #	Page #	Section #	Specification(s)	Change(s) Modification(s)
14	26	3.13.	Overtime	<p><b>Service Provider Question:</b> Would the City please clarify the City's standard regarding overtime?</p> <p><b>Answer:</b> Please reference Section 3.13. on page 26 for overtime standards. Any exceptions to the conditions detailed in Section 3.13 must be clearly detailed in the Exceptions portion of the Service Provider's proposal.</p>
15	28	3.19.	Additional Services	<p><b>Service Provider Question:</b> Can the Service Provider assume that any pay roller will be full time and have a pay rate of over \$15/hr?</p> <p><b>Answer:</b> The City does not set specific minimum pay rates for pay rolling. The specific pay rate details of each request for pay rolling will be negotiated at the time of request between the requesting department and the Service Provider. Service Providers wishing to take exception to the City's pay rolling requirements should include that information in their proposal as a detailed exception. Service Providers are instructed to include all pay rolling costs in their Pricing Worksheet (Form 4). Also, please refer to Attachment A herein for the revised Form 4.</p>
16	31	4.1.3.	Proposed Solution	<p><b>Service Provider Question:</b> Since this is a staff augmentation contract, can the City please clarify how the Service Provider's Proposed Solution should address each point from the Scope of Services?</p> <p><b>Answer:</b> The Service Provider should state whether its Proposed Solution complies and include any additional information requested. The Service Provider is permitted to include Supplemental Information as needed. Please reference RFP Section 4.1.3, page 31.</p>
17	31	4.1.5.	CCPA Plan	<p><b>Service Provider Question:</b> Does the City anticipate the number of Participating Public Agencies will grow, and if so, will this entail providing equipment, products, or personnel?</p> <p><b>Answer:</b> The City anticipates that the number of Participating Public Agencies will grow. While the CCPA currently includes over 40 available contracts for equipment, products, and personnel, the scope of this RFP covers only the Services described therein, as further detailed in Section 3.</p>

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18	37-38	6., Form 4	Pricing Worksheet	<p><b>Service Provider Question:</b> Is the Pay Rate meant to be inclusive of insurance &amp; fringes?</p> <p><b>Answer:</b> The Service Provider's proposal must include all costs associated with the Services, in accordance with Form 4. Please refer to Attachment A herein for an updated pricing form per Item #2, above.</p>
19	37-38	6., Form 4	Pricing Worksheet	<p><b>Service Provider Question:</b> With regard to pay/bill rates for participating CCPA agencies, will agencies outside of the City of Charlotte and State of North Carolina be subject to the same rates as outlined in our pricing proposal?</p> <p><b>Answer:</b> The City is requesting a high/low range for pay rates and bill rates, and a markup percentage from Service Providers in the RFP, Form 4. While pay and bill rates are anticipated to vary depending on the specific details and requirements of each job assignment, the Service Provider's markup percentage is required to remain the same in its completed Form 4. It is also understood that pay and bill rates may vary by region, but it is required that the Service Provider's markup percentage remain the same regardless. Also, please note the revised Form 4 in Attachment A, per Item #2, above.</p>
20	39	6., Form 4	Pricing Worksheet	<p><b>Service Provider Question:</b> For the CCPA "incentives/rebates" program, would this schedule apply to each entity separately, or to all participating agencies in the program in aggregate? For example, a Service Provider offers a 1% discount at \$500,000 in spend. Agency A spends \$350,000 on services, Agency B spends \$50,000 in services, and Agency C spends \$125,000 in services (combined total of \$525,000). Would all three (3) agencies then receive the rebate since total spend through the CCPA contract meets the threshold?</p> <p><b>Answer:</b> Typically, rebates are provided either on a per Participating Public Agency basis OR on an aggregate spend basis across all participating public agencies, including the City. The Service Provider is expected to define the terms of any rebate it wishes to offer on Form 4. Additional/supplemental pages may be attached by the Service Provider as needed to detail its offer(s).</p>

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21	43	6., Form 7	Service Provider Experience, Customer Base	<p><b>Service Provider Question:</b> How should the Service Provider define public sector clients? Would this include government contractors, Federal and/or state agencies, and/or public universities?</p> <p><b>Answer:</b> Public sector clients are typically those concerned with providing various government services. As stated in the RFP, the City prefers clients who are similar to the City, (i.e. another city, county, state agency, authority, etc.), but public universities may also be similar. Government contractors are less similar, since they are primarily private businesses, which are not publicly governed/controlled.</p>
22	43	6., Form 7	Service Provider Experience, User Groups	<p><b>Service Provider Question:</b> For the user group question section on Form 7, is the intent to indicate user groups the Service Provider participates in? Is the City interested in professional organizations in addition to user groups or should the Service Provider's response in this area be limited to user groups?</p> <p><b>Answer:</b> The City is interested in the user groups the Service Provider participates in, and professional organizations may be included, as well.</p>
23	43-45	6., Form 7	Service Provider's Background Response  Service Provider Questions	<p><b>Service Provider Question:</b> May Service Provider's develop a team approach to provide the best solution for the RFP?</p> <p><b>Answer:</b> Each proposal submitted must be from a Service Provider acting as the Primary Service Provider. Any subcontractors must be clearly defined and listed on Form 7.</p>
24	43-47	6., Forms 7 & 8	Service Provider's Background Response  Service Provider Questions	<p><b>Service Provider Question:</b> For items where supplemental pages need to be added (e.g., Required Forms 7 and 8), does the City prefer to have these supplemental pages to immediately follow the form/section they apply to, or would the City prefer the Service Provider include an additional section tabbed "Supplemental Materials" for these pages?</p> <p><b>Answer:</b> The City prefers that supplemental information for responses in Forms 7 and 8 immediately follow each respective Form.</p>

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25	45	6., Form 7	Additional Narrative Response, 10 <sup>th</sup> Narrative Question	<p><b>Service Provider Question:</b> Is the Service Provider's response here required only if 15% of the Services will be provided by a subcontractor?</p> <p><b>Answer:</b> The Service Provider's response is required if its team is composed of more than one (1) company (partnership), or if any subcontractor will provide more than 15% of Services.</p>
26	45	6., Form 7	Additional Narrative Response, 12 <sup>th</sup> Narrative Question	<p><b>Service Provider Question:</b> Please clarify what is meant by "level of staffing" in this request.</p> <p><b>Answer:</b> The level of staffing refers to the number of people working at the Service Provider's and/or any subcontractor(s) facilities.</p>
27	46	6., Form 8	Service Provider Questions, 2 <sup>nd</sup> Question	<p><b>Service Provider Question:</b> If this is a staff augmentation services contract, what information is expected in the project plan? If a Service Provider cannot use MS Project, what is an acceptable format for their project plan?</p> <p><b>Answer:</b> A Service Provider planning to establish a local presence in the Charlotte area should describe its plan for doing so under the second question in Form 8. While MS Project is a preferred format, it is not required, so the Service Provider may choose another format at its discretion.</p>
28	48	6., Form 9	Service Provider Contractor Information	<p><b>Service Provider Question:</b> If the Service Provider has provided similar services to various states, counties, cities, etc. across the U.S., but has not provided similar services in Charlotte, how should the Service Provider approach this Form?</p> <p><b>Answer:</b> The Service Provider should attach supplemental information to Form 9, detailing how it historically provided Contractors meeting the Category Descriptions listed in RFP Section 3.3.3. for a similar city or client. The Service Provider should still include current information about its ability to provide Contractors meeting the Category Descriptions in Charlotte.</p>
29	50-52	6., Form 10	References	<p><b>Service Provider Question:</b> May the Service Provider have more than one reference per entity?</p> <p><b>Answer:</b> The City is requesting the Service Provider list only one reference per entity.</p>



Item #	Page #	Section #	Specification(s)	Change(s) Modification(s)
30	50-52  33	6., Form 10  Section 5.	References  Proposal Evaluation Criteria	<p><b>Service Provider Question:</b> How significant of an impact will it be for a Service Provider with limited past performance, that may be unable to provide requested number of references?</p> <p><b>Answer:</b> The City will evaluate the Service Provider's proposal based on all of the criteria listed in RFP Section 5, rather than just one criterion. The City does not weigh any of the criteria, but the proposal should detail clearly how your company's experience supports its ability to provide the Services requested by the City.</p>
31	57	7, Exhibit A, Section 10.	Progress Reports	<p><b>Service Provider Question:</b> How would the Service Provider have this knowledge? It seems like the City manager would be the one to complete this.</p> <p><b>Answer:</b> The sample contract (Section 7., Exhibit A) is provided for reference purposes. This section may not be fully applicable to the Services as is, but will be negotiated with the final Service Providers recommended for award. The Service Provider should detail any exceptions to the conditions described in Section 10 clearly in the Exceptions portion of the Service Provider's proposal.</p>
32	76-77	7, Exhibit B	Sample Request For Resumes Notification	<p><b>Service Provider Question:</b> Can you please provide a sample Request for Resumes, so that we can see the types of information requested as well as the format?</p> <p><b>Answer:</b> Please refer to Exhibit B for the sample request for resumes. Since this RFP includes an updated template from what is currently used, the City does not have additional samples available to share at this time.</p>
33	76-77	7, Exhibit B	Sample Request For Resumes Notification	<p><b>Service Provider Question:</b> How does the City distribute its Request For Resumes among vendors? Will it use any VMS?</p> <p><b>Answer:</b> The City utilizes an InfoPath SharePoint webpart on the City's intranet site to automatically distribute all Request For Resumes to awarded vendors, based on the award categories detailed in their contracts.</p>

Item #	Page #	Section #	Specification(s)	Change(s) Modification(s)
34			General Question	<p><b>Service Provider Question:</b> Would the City please provide the total amount of overtime incurred by contracted employees in the last 12 months?</p> <p><b>Answer:</b> The City does not currently have the specific data requested for overtime.</p>

In order to constitute a complete proposal/bid response you must acknowledge receipt of this addendum with the Addenda Receipt Confirmation Form in Section 6 of the RFP in your Proposal.

***Any Service Provider not acknowledging receipt of an issued addendum may not be considered.***

In the event additional changes or clarifications to this RFP are warranted, all Service Providers are responsible for monitoring [www.ips.state.nc.us](http://www.ips.state.nc.us) for additional addenda.

We appreciate your interest in doing business with the City of Charlotte/Mecklenburg County and look forward to receiving a proposal/bid from your company.

Sincerely,

Philip Keller  
Procurement Officer

cc: RFP Team  
RFP File

**269-2014-060 – IT Contract Professional Services**  
**Addendum #2, Attachment A – Form 4 – Pricing Worksheet**

\*\*\*Updated Form 4 provided on next page\*\*\*

**REQUIRED FORM 4 - PRICING WORKSHEET**

**RFP # 269-2015-060**

**IT Contract Professional Services**

Regardless of exceptions taken, Service Providers shall provide pricing based on the requirements and terms set forth in this RFP. Pricing must be all-inclusive and cover every aspect of the Project. Cost must be in United States dollars rounded to the nearest quarter of a dollar. **If there are additional costs associated with the Services, please add to this chart. Your Price Proposal must reflect all costs that the City will be responsible for. Service Providers should only provide pricing for those Categories and Levels for which they are able to provide eligible professional IT Contractors.**

**Indicate the low/high Pay Rate range and Bill Rate range for each Category/Level/Type below, as well as the mark-up for each applicable category. Pay Rate and Bill Rate ranges, as well as Mark Up percentages indicated here shall be incorporated into the final Contract with the Service Provider.**

<b>CATEGORY</b>	<b>LEVEL</b>	<b>PAY RATE LOW</b>	<b>PAY RATE HIGH</b>	<b>BILL RATE LOW</b>	<b>BILL RATE HIGH</b>	<b>MARK UP %</b>
Business Analyst	Business Analyst Support					
	Business Analyst					
	Senior Business Analyst					
Project Manager	Project Manager Support					
	Project Manager					
	Senior Project Manager					
Application Specialist	Application Specialist Support					
	Application Specialist					
	Senior Application Specialist					
Testing Specialist	Testing Specialist Support					
	Testing Specialist					
	Senior Testing Specialist					
Technical Writer	Technical Writer Support					

	Technical Writer					
	Senior Technical Writer					
Training Specialist	Training Specialist Support					
	Training Specialist					
	Senior Training Specialist					
Network Engineer	Network Engineer Support					
	Network Engineer					
	Senior Network Engineer					
System Administrator	System Administrator Support					
	System Administrator					
	Senior System Administrator					
Database Administrator	Database Administrator Support					
	Database Administrator					
	Senior Database Administrator					
Security Engineer	Security Engineer Support					
	Security Engineer					
	Senior Security Engineer					
Technician	Technician Support					
	Technician					
	Senior Technician					
Other *						

**\* PLEASE NOTE: The Service Provider is not expected to provide Pay Rate and/or Bill Rate Ranges for the Job Category “Other”. However the Service Provider is required to indicate its Mark Up Percentage for the Job Category “Other”.**

Administrative Fees: Per Section 3.7., the Service Provider shall pay the City of Charlotte an Administrative Fee of \_\_\_% (minimum of 1%) based on all City and Participating Public Agency sales volumes within 30 days of the end of each calendar quarter set forth in the subsequent Contract. It is the responsibility of the Service Provider to set the Administrative Fee.

Pricing Incentives and Rebates: Service Providers shall identify any incentives and rebates offered based on volume, dollar amounts, or other criteria:

REBATE DESCRIPTION	AMOUNT / PERCENTAGE

Reference the Charlotte Cooperative Purchasing Alliance (CCPA) website at <http://www.charlottealliance.org>

In the table below, indicate the cost associated for each type of background check that may be requested from time to time. The Rates indicated here shall be incorporated into the final Contract with the Service Provider.

Type	Level	Cost
Criminal (Additional incidences – original and annual checks are at the expense of the Service Provider )	State	\$ /ea
	National	\$ /ea
DMV	State	\$ /ea
	National	\$ /ea
Employment	State	\$ /ea
	National	\$ /ea
Credit Check	State	\$ /ea
	National	\$ /ea
Sexual Offender Registry	State	\$ /ea
	National	\$ /ea

Please indicate the cost associated with “Pay Rolling” Services defined in RFP Section 3.19.

Additional Services	Cost
“Pay Rolling”	