



PRE-PROPOSAL CONFERENCE

SALES AND USE TAX AUDIT SERVICES FOR THE FINANCE DEPARTMENT

February 25, 2016
2:00 PM



Agenda

- Opening Remarks
- RFP Overview
- General Information
 - ❖ Required Forms
 - ❖ Disqualifications
 - ❖ Other Requirements and Forms
 - ❖ Evaluation and Selection Process
- Questions and Answers
- Announcements

Introductions

- City of Houston Staff
 - ❖ Department Representatives
 - ❖ Key Staff – Subject Matter Experts
- Proposers

RFP Overview

Proposal submittal and delivery details:

- Thursday, March 17, 2016 at 2:00 p.m. CST
- Office of City Secretary, 900 Bagby, Room P101, Houston, TX 77002
- Four (4) copies, including one (1) marked “Original” and four (4) NON-PASSWORD PROTECTED electronic thumb drives containing the entire proposal and exhibits.
- Sealed boxes or envelope(s) bearing the assigned Solicitation Number: S66-T25698
 - Price Proposal – separate sealed envelope. Do not include on the thumb drive.

RFP Overview Cont'd

Proposal format:

- Printed “Original” signed in **BLUE** ink by individual(s) legally authorized to bind the proposer

General Instructions

Proposal Contact:

Shannon Pleasant – Sr. Procurement Specialist

- Submit all required forms
- Read the entire RFP
- Questions must be submitted to Shannon.Pleasant@houstontx.gov

Required Forms

- Offer and Submittal, References and Proposed Subcontractors (Exhibit I)
- MWBE Participation forms (Exhibit II)
- Fair Campaign Ordinance (Exhibit III)
- Affidavit of Ownership or Control (Exhibit IV)
- Anti-Collusion Statement (Exhibit V)
- Conflict of Interest Questionnaire (Exhibit VI)

Disqualifications

Vendor proposals subject to disqualifications:

- Late Proposal
- Violation of Quiet Period
- Non-Responsive (failure to answer required questions, complete forms, etc.)
- Exception to Indemnification Language
- Exceptions to COH Contract Terms

Other Requirement and Forms

Comments from the Office of Business Opportunity (OBO)

- Hire Houston First
- Minority and Woman Business Enterprises (MWBE) – 5% Goal
- Pay or Play (POP) program

Evaluation and Selection Process

- Criteria
- Process/Timeline
 - ❖ Oral Presentations
 - ❖ Site Visits
 - ❖ Contract Negotiations
 - ❖ Approval of City Council
- Notification of Award(s)

Questions and Answers

Responses to questions at today's pre-proposal conference are not binding,

- Submit questions by email to Shannon.Pleasant@houstontx.gov
- Official responses will be posted as Letter(s) of Clarification

THANK YOU

Thank you for your attendance today. We look forward to receiving your proposals.