

**DRAFT**

The Chief Administrative Officer for  
City **of Burlington, Vermont**

**Request for Proposals**

for

Budget Consulting Services

for the Burlington City Council

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## **Introduction**

Please be advised that the Chief Administrative Officer of the City of Burlington, Vermont is requesting proposals to provide budget consulting services to the Burlington City Council for the Fiscal Year 2011 budget process.

All prospective responders will be afforded an opportunity to submit statements of qualifications in response to this request and will not be discriminated against on the basis of political or religious affiliation, race, color, national origin, age, sex, sexual orientation, gender expression, veteran status or disability in receiving consideration for any award of any contract entered into pursuant to this Request.

This Request for Proposals (RFP) is an invitation by the City of Burlington for Respondents to submit a proposal for services as a competitive bid. Submittal of a proposal does not create any right in or expectation to a contract with the City of Burlington. The City of Burlington reserves the right to reject any or all proposals and to negotiate with one or more bidders to further modify the proposals. The City will not incur a financial obligation for any costs incurred by any company in preparing their proposals.

### **1. Purpose**

- The City of Burlington, Vermont (COB) is soliciting the services of a qualified consultant for the purpose of providing budget consulting services to the Burlington City Council for the FY2011 budget process.
- The requested services include, but are not limited to the review and explanation of the proposed budget to the City Councilors, and documentation for any proposed changes to Burlington City Council and Administration.
- Services will require frequent evening meetings, extensive research working with the City Administration, and regular updates to the Burlington City Council in a formal presentation manner.

### **2. Background /General information**

- The Burlington City Council consists of 14 elected City Councilors, 2 from each ward of the City. The City Administration is led by an elected Mayor and an appointed Chief Administrative Officer. There are 650+ employees in the City of Burlington.
- The City of Burlington Operating Budget is \$220 million and contains a general fund, four special revenue funds, five enterprise funds, a retirement trust and the school department budget.
- The focus for the consultant will be on the following major city departments: police, fire, parks, DPW and human resources. Details of the services required will be negotiated with the Burlington City Council or its representatives after a consultant is selected. However, this

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contract will be for a limited period of time and will be concluded prior to or at the end of the adoption of the FY 2011 Budget.

### 3. General Submittal Information

Interested vendors should submit two separate proposals under separate cover. The first proposal is the Technical Requirements Proposal (TRP) and should provide the vendors proposed services pursuant to this RFP. The second proposal is the Cost Proposal (CP) and should set forth the vendors proposed compensation for the study.

- Provide one copy of the Cost Proposal (CP) under separate sealed cover and five complete copies of the Technical Requirements Proposal (TRP) under separate cover.
- Send proposals to:

Jonathan Leopold, Chief Administrative Officer  
City of Burlington  
City Hall  
149 Church Street  
Burlington, Vermont 0540.1

c. Submittals are due on or before 4:00 p.m., Tuesday, February 16, 2010

### 4. The Technical Requirements Proposal (TRP)

The TRP should set forth the vendor's proposed services, methodologies and general qualifications.

- **Consultant's business information**
  - i. Consultant's official business name, address (both physical and mailing), telephone and fax numbers, type of business such as sole proprietorship, partnership, or corporation, including the State of incorporation;
  - ii. Length of time in business;
  - iii. Location(s) of business operations;
  - iv. Firm's qualifications;
  - v. Qualifications and experience of key personnel;
  - vi. Evidence of meeting outlined qualification requirements, including:
    - a) identification of similar projects performed; and

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b) appropriate references including the name, address, telephone number, fax and email address of at least three clients for whom similar services were performed.

- **Statement Regarding Proposed Services**

- i. Provide a description of the proposed services to be performed and the deliverables and product to be provided to the City.

## 5. Cost Proposal

The vendor should submit under separate sealed cover the vendor's proposed cost for performing the study and related services

- Provide a time and materials with a maximum fixed price bid for providing the services in general for a specified time frame. The quote shall include a detailed itemized price breakdown of the lump sum maximum price.
- To the extent desired, additional recommendations and services or options may be included as additions to the basic project on an optional basis. These optional items shall be priced separately as additional services.
- The CP should identify the vendor's hour rates for additional services beyond the scope of this RFP.

## 6. Minimum Requirements of the Consultant

- The Consultant should have completed budget consultations in a public or municipal environment similar in scope and responsibilities to the requested services of COB. The Consultant should have been performing these services for a minimum of five years.

The COB will make work space available for the consultant to use when conducting interviews with employees or research.

## 7. Contact During Procurement Process

The City is committed to a proposal process that maintains the highest level of integrity. Accordingly, all communications are limited to those authorized by and described in this RFP. Any attempt to influence any of the participants, whether that attempt is oral or written, formal or informal, direct or indirect, outside of the RFP process is strictly prohibited and may result in the disqualification of a proposal.

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- All contact prior to 4:00 pm February 10, 2010 shall be through COB's Assistant Chief Administrative Officer, Ben Pacy.
- All questions/concerns/requests must be in written form and transmitted via email to:

Ben Pacy, Assistant Chief Administrative Officer, City Hall, 149 Church Street,  
Burlington, Vermont 05401 or to [BPacy@ci.burlington.vt.us](mailto:BPacy@ci.burlington.vt.us).

- All proposals received by the City of Burlington are subject to the Access to Public Records law of the State of Vermont.
- The City will, at its discretion, schedule presentations and interviews of selected proposals.

## 8. Criteria for Evaluation of Proposals

Proposals will be evaluated in terms of the degree to which the proposal reflects an optimum balance of the services to be provided and the cost.

- COB will evaluate each of the submitted quotes to determine if they demonstrate that the Consultant understands the scope of services requested and can demonstrate a clear cost effective plan for accomplishing the requirements listed.
- All proposals submitted will be evaluated using the following criteria:
  - i. Compliance with the RFP;
  - ii. Demonstrated understanding of the project and a clear written plan for action for accomplishing the scope of services requested;
  - iii. Full description of the recommended services to be provided by the Consultant and a timeline for the start and completion of the various services as well as an overall time for completion;
  - iv. Ability to complete the work within the time specified including a listing of the number of staff expected to be utilized on the project;
  - v. Qualification of the firm, including but not limited to its experience and personnel assigned to the project and any subcontractors, if any;
  - vi. The methodologies and data to be utilized by the vendor; and
  - vii. Cost

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## 9. Scope of Services

### • General services required:

- i. The Consultant will meet with the Burlington City Council and develop a work plan and agenda for providing information to questions or concerns identified by the members of the City Council relative to the fiscal year 2011 budget.
- ii. The Consultant will report back to the Burlington City Council in a format and schedule determined by the members of the City Council.
- in. The Consultant will be required to draw on experience and research to address the City Council with explanations of fund accounting practices, financing mechanisms, public bonding procedures, lease purchase agreements, long term and short term investing procedures and best practices, etc.
- iv. The Consultant will maintain formal records of all research, communications and presentations to the Burlington City Council for public record purposes.

## 10. Project Deadlines

This project should begin no later than March 9, 2010. The projected completion date will be determined by the final contract, but will not to extend beyond the adoption of the FY2011 Budget.

### 1.1. Proposal Acceptance Period

All proposals submitted for the City's consideration must provide for an acceptance period guaranteeing the City that both the administrative and cost proposals will remain in effect and may be accepted by the City for a period of not less than sixty (60) days from the date of the submission of the proposal.

## 12. Changes, Modifications and/or Cancellation of RFP

The City of Burlington reserves the right to make changes in this RFP by issuance of written addendum or amendments. Any addendum or amendments, whether made as a result of a potential written inquiry or otherwise, will be provided to all vendors.

## 13. Rejection of Proposals

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The City reserves the right to reject any and/or all proposals based on the judgment of the City of the best interest of the City. All fees and costs associated with the proposal should be guaranteed for the term of the contract.

## **14. Contract Cancellation**

The City of Burlington reserves the right to cancel the contract at any time with thirty (30) days notice of cancellation or non-renewal of contract.

## **15. Support of Consultant's Efforts**

COB will provide the following information in support:

- i. Access to the City's fund accounting software
- ii. Copy of last printed approved budget
- iii. Copies of Department budget documents and requests
- iv. Detailed information on current pay and benefit levels
- v. Copy of Organizational charts
- vi. Access to City Department Heads

## **16. Payment**

The Consultant will be paid in full upon completion of the project and in accordance with an agreed upon schedule of progress payments and approved deliverables.