



# Request for Information For Telecommunication Audit

## Request for Information

The City of Winston-Salem is issuing this Request for Information (RFI) to qualified companies that provide telecommunication auditing and expense management services. Vendor experience and skills should include the following:

- Telecom invoice and billing validation
- In-depth understanding of complex tax and tariff codes
- Analysis of fees and surcharges
- Usage analysis
- Contract compliance

**Note:** All questions concerning this RFI should be directed to Todd Porter: [toddp@cityofws.org](mailto:toddp@cityofws.org) Questions will be accepted through 12:00 Noon, June 15, 2018.

Businesses are invited to submit responses for providing the requested telecommunication auditing and expense management services to the City by **12:00 Noon on June 22, 2018**. Responses submitted after this deadline will not be considered. The submittal, in PDF format, should be submitted to Todd Porter., IS Infrastructure Services Coordinator, to the following email address: [toddp@cityofws.org](mailto:toddp@cityofws.org)

## Background Information

The City of Winston-Salem has deployed Voice over Internet Protocol (VoIP) technology throughout core facilities and has replaced its Primary Rate Interface (PRI) technology with a Session Initiation Protocol (SIP) trunk solution for communications to the Public Switched Telephone Network (PSTN). The City still has Centrex lines at locations throughout office buildings, recreation centers, fairgrounds, fire stations, water treatment facilities, and various service operations locations.

The City has also implemented over 125 miles of fiber to connect core facilities. This allows for the replacement of some leased data communication services.

There are plans to migrate other facilities over to the City's fiber infrastructure and VoIP platform as project funding is approved.

The following companies provide communication services to the City and are candidates for auditing:

- AT&T Centrex, POT's, 1FB and long distance service
- CenturyLink and Windstream local telephone service
- Spectrum Business Class Metro-E and cable modem service
- CenturyLink /Level(3) SIP Trunk
- Verizon Wireless cellular voice and data service

## Telecom Audit Services

The ideal service offering will include a comprehensive baseline evaluation of the City's telecommunications environment to identify billing inaccuracies, recover available credits, review contractual compliance, and develop opportunities for process improvement and service optimization. The following are major objectives:

- Review of telecommunication service contracts for local and long distance telephone service.
- Review data communication leased lines, cable modem services.
- Review the cellular voice and data services.
- Review a minimum of six consecutive months of invoices for the services mentioned above to verify billing accuracy based on service contracts and other published rates.
- Provide written and an oral report of the audit's discoveries and recommendations. The presentation does not need to be on-site.
- Evaluate the cost effectiveness of the City's current telecommunication contracts and provide a written report of any recommended changes to current practices.

## Questions for Vendors

1. How many years of telecommunication auditing experience do you have?
2. What differentiates your company from others in this market space?
3. What information and documentation do you require to perform the audit?
4. What is the typical cost-recovery percentage that your clients experience after an audit?
5. What are the cost to the City to perform this audit?
6. What is your methodology of performing this type of audit?
7. Can you provide three references that have utilized your services in the last year?

**Note:** References must be of similar size and complexity. Similar size and complexity means an audit involving local telephone, long distance, leased lines and cellular services of an annual expenditure of at least \$500,000. The references must include a brief description of services performed, the contact's name and telephone number.

## RFI Response Evaluation - Evaluation Criteria

All proposals received prior to the established due date/time will be evaluated and considered based on the completeness of the responses to the defined specifications. The City of Winston-Salem reserves the right to award this contract to the vendor deemed best suited to achieve the goals and desires outlined in this RFI.

Respondents will be evaluated for selection on the basis of the Proposer most qualified to meet the requirements of this RFP. Major criteria to be considered in evaluation may include, but shall not necessarily be limited to:

- **M/WBE Commitment (20%)** – Proposer's efforts to comply with all the terms and conditions of the City of Winston-Salem's Minority and Women Business Enterprise (M/WBE) Program through award of subcontracts to minority and women owned business enterprises and utilization of minority and women owned business enterprise suppliers to the fullest extent consistent with the efficient performance of this contract.
- **Local Business (Distance from City of Winston-Salem) (20%)** - Proposer's business location/distance from City of Winston-Salem.
- **Work Experience (20%)** - The background, education, and experience of the respondent in providing similar services elsewhere, including and especially the level of experience in working with municipalities, and the quality of services performed. Determination that the selected respondent has no contractual relationships that would result in a conflict of interest to the City's contract. Proposer should include a list of at least three references that have utilized your services in the last year.

- **Cost (20%)** The total cost of providing all the required services to perform this audit.
- **Methodology (20%)** Has the vendor demonstrated an understanding of the services requested by Winston-Salem by proposing a methodology and project timeline that will deliver a successful implementation of those services?

The following table list the weighted criteria for our evaluation process:

<b>Factor</b>	<b>Criteria</b>	<b>Weight</b>
1	M/WBE	20
2	Local Vendor	20
3	Experience	20
4	Cost	20
5	Methodology	20

**Contact information:**

Tom Kureczka  
 Chief Information Officer  
[tomk@cityofws.org](mailto:tomk@cityofws.org)

Todd Porter  
 IS Infrastructure Services Coordinator  
[toddp@cityofws.org](mailto:toddp@cityofws.org)

100 E. First Street Ste. 520  
 Winston Salem, North Carolina 27101

P.O. Box 2511  
 Winston Salem, North Carolina 27102

**MINORITY/WOMEN BUSINESS ENTERPRISE (M/WBE)  
PROGRAM PARTICIPATION**

**SPECIAL INSTRUCTIONS FOR PROPOSALS ESTIMATED TO COST LESS THAN \$100,000 REGARDING  
COMPLIANCE WITH THE CITY OF WINSTON-SALEM'S AND/OR CITY/COUNTY UTILITY  
COMMISSION'S MINORITY AND WOMEN BUSINESS ENTERPRISE (M/WBE) PROGRAM**

Policy

It is the policy of the City of Winston-Salem and/or the City/County Utility Commission (an agency of the City of Winston-Salem), that minority and women owned business enterprises shall have an equal opportunity to participate in the performance of contracts financed in whole or in part with City and/or Commission funds.

Obligation of Proposers

Proposers agree to use their best efforts to comply with all the terms and conditions of the City of Winston-Salem's and/or City/County Utility Commission's Minority and Women Business Enterprise (M/WBE) Program, as the same may be amended from time to time, through the award of subcontracts to minority and women owned business enterprises and utilization of minority and women owned business enterprise suppliers to the fullest extent consistent with the efficient performance of this contract. As used in this contract, the term "minority and women business" shall mean a company that is 51% or more owned and controlled by minority group members or women.

A **10%** goal for participation by minority and women-owned businesses has been established for this request for letters of interest. A proposer may meet this goal through the participation of M/WBE sub-consultants and/or through his/her own performance on the project if the proposer is a certified minority/woman-owned firm. If it is the normal practice of the proposer to perform all elements of this type of service with its own workforce and without the use of sub-consultants, the proposer must certify, by the submission of Affidavit B, that if they do employ any sub-consultants during the contract, they will be subject to the M/WBE goal established for this request for letters of interest. The utilization of M/WBE firms accounts for 20% of the evaluation and scoring, and will not be allocated to proposals in which an Affidavit B is submitted. A proposer may meet the 10% goal through the participation of M/WBE sub consultants and/or through their own performance on the project if the proposer is a certified minority and/or woman owned firm.

Firms are highly encouraged to consider any and all possibilities for M/WBE participation. A complete list of State of North Carolina HUB certified MBE's and WBE's is available at <https://www.ips.state.nc.us/vendor/searchvendor.aspx?t=h>. The 10% M/WBE goal may be satisfied by an entity that qualifies as a Minority Business Enterprise under N.C. General Statute 143-128, and that has been certified by the State of North Carolina. During the course of the contract successful consultant will be required to submit **Minority Documentation for Contract Payments, Affidavit F**, with each monthly pay application. Final payment will be withheld until the consultant completes and submits an **Affidavit of Payment to M/WBE Sub Consultants**. The City, however, at its discretion may require additional periodic reports. Final payment will be withheld until it has been determined that the goal percentages for M/WBE participation, previously agreed to by the successful consultant, have been confirmed by the City and/or Commission.

**MWBE Documentation** -Firms are required to include following documentation with the proposal. **Failure to do so will render your proposal as non-responsive:**

- Identification of Minority Business Participation- must be submitted with your letter of interest if your firm will employ any sub-consultants on this project; or
- Affidavit B - Intent to Perform Contract with Own Workforce, if the proposer intends to perform 100% of the work required for the contract without the use of sub-consultants.

**Additional M/WBE Forms** – To be utilized by the firm who is awarded the contract with the Owner Affidavit F - Minority Documentation for Contract Payments, M/WBE Replacement Request Form, and the Final Affidavit of Payment to M/WBE Sub-consultants.

Questions or inquires relative to City of Winston-Salem's Minority and Women Business Enterprise (M/WBE) Program must be directed to **Tiesha Hinton, Business Inclusion Manager** at [tieshah@cityofws.org](mailto:tieshah@cityofws.org) or phone 336-734-1262.

**\*\*\*MUST BE SUBMITTED WITH PROPOSAL\*\*\***

(Unless the prime consultant intends to perform 100% of the work with Own Workforce)

**IDENTIFICATION OF MINORITY BUSINESS PARTICIPATION**

\_\_\_\_\_  
(Name of Project)

I, \_\_\_\_\_  
(Name of Consultant)

do hereby certify, as \_\_\_\_\_ (insert title and name of company)  
that on this project, \_\_\_\_\_ (insert name of company) will use the following  
M/WBE firms as consultants. A proposer may meet the 10% goal through the participation of M/WBE sub-  
consultants and/or through their own performance on the project if the proposer is a certified minority and/or  
woman-owned firm.

The Proposer shall identify on its proposal the M/WBE businesses to be used on this project **and** pursuant to subsection (f) of this statute provide the total percentage of the proposal that will be performed by the minority businesses. **Failure to list, at a minimum, the minority firm business name and the total percentage of M/WBE firms contracting will render your proposal as non-responsive and will not be considered for award.** If the Proposer has no minority participation, they shall indicate this on the table below by entering the word "None" or the number "0." **Blank forms will not be deemed to represent zero participation.**

Minority Firm Name Phone Number	City-State	Minority Category*	Type of Work	Percent of Project Work
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

\* Minority Categories: Black, African American (B), Hispanic (H), Asian American (AA), American Indian (AI), Female (WF), Socially and Economically Disadvantaged (SE), and Disabled (D).

The total percentage of M/WBE firms contracting will be \_\_\_\_\_ %

**AFFIDAVIT B**

**INTENT TO PERFORM CONTRACT WITH OWN WORK FORCE**

County of \_\_\_\_\_

Affidavit \_\_\_\_\_

(Name of Firm)

I, hereby, certify that it is the intent of the aforesaid Firm to perform 100% of the work required for the contract:

\_\_\_\_\_

(Name of Project)

In making this certification, the Proposer states:

- That the proposer does not customarily subcontract elements of this type project,
- Normally performs, has the capability to perform, and will perform all elements of the work on this project with his/her own current work force, and
- Agrees to provide any additional information or documentation requested by the City of Winston-Salem in support of the above statement.

The undersigned hereby certifies that he/she has read this certification and is authorized to bind the Proposer to the commitments herein contained.

Date: \_\_\_\_\_

Name of Officer: \_\_\_\_\_

Signature \_\_\_\_\_

Title \_\_\_\_\_

State of North Carolina, County of \_\_\_\_\_ Subscribed and sworn before me,

This \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Notary Public \_\_\_\_\_ My commission expires \_\_\_\_\_

**SEAL**

*In the event the Proposer does not self-perform 100% of the work, the contract will be subject to the M/WBE goals originally established for this project, as well as, good faith efforts and documentation requirements of this program. The utilization of M/WBE firms accounts for 20% of the evaluation and scoring, and will not be allocated to proposals in which an Affidavit B is submitted. A proposer may meet the 10% goal through the participation of M/WBE sub-consultants and/or through their own performance on the project if the proposer is a certified minority and/or woman-owned firm.*

**THIS DOCUMENT MUST BE SUBMITTED  
WITH EACH PAY REQUEST AND FINAL PAYMENT**

**AFFIDAVIT "F"**

**MINORITY DOCUMENTATION FOR CONTRACT PAYMENTS**

Prime Consultant: \_\_\_\_\_  
 Address & Phone Number: \_\_\_\_\_  
 Project Name: \_\_\_\_\_  
 Pay Application Number: \_\_\_\_\_ Period: \_\_\_\_\_

The following is a list of payments to be made to minority business sub-consultants on this project for the above mentioned period.

Minority Firm Name and Address	Minority Category*	Amount Paid For This Period	Amount Paid To Date
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

\* Minority Categories: Black, African American (B), Hispanic (H), Asian American (AA), American Indian (AI), Female (WF), Socially and Economically Disadvantaged (SE), and Disabled (D).

Date: \_\_\_\_\_ Approved/Certified by \_\_\_\_\_

In addition to the list of payments above, I hereby certify that no sub-consultant who was identified and listed on Affidavit A- Minority Participation/Good Faith Efforts Form, has been replaced without approval from the City of Winston-Salem's M/WBE Division.  
 Note: Additional M/WBE's can be added for new work only. In this case, please notify M/WBE staff.

Name: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Signature \_\_\_\_\_

The above mentioned project is approximately \_\_\_\_\_ percent complete

**TO BE COMPLETED AND SUBMITTED PRIOR TO FINAL PAYMENT BEING MADE  
AFFIDAVIT OF PAYMENT TO  
M/WBE SUBCONSULTANTS**

The undersigned certifies that \_\_\_\_\_  
 (Name of Proposer)  
 has made payment to all M/WBE sub-consultants listed below in accordance with the contract requirements for \_\_\_\_\_  
 (Name of Project)

Your contractual requirements for this project is **10%** with certified M/WBE firms.

Sub- consultant	Address	Amount Paid
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

(Attached another sheet if needed)

Authorized Signature \_\_\_\_\_  
 On this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, \_\_\_\_\_  
 (Name of Authorized Person)

appeared before me, being personally known, being duly sworn, did execute the foregoing affidavit, and did so state that he/she was properly authorized by \_\_\_\_\_  
 to execute the affidavit and did so on his/her free act and deed. (Name of Bidder)

Notary Public \_\_\_\_\_ My commission expires \_\_\_\_\_

**SEAL**

**TO BE COMPLETED BY CITY**  
**M/WBE SPENDING**

Project: \_\_\_\_\_

Original Proposal Cost: \$ \_\_\_\_\_

Contractual Requirement: M/WBE **10%**

Subcontract Spending: M/WBE \$ \_\_\_\_\_ %

Verified this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ By: \_\_\_\_\_  
 M/WBE Staff



## MWBE Replacement Request Form

It is the policy of Winston-Salem and the City/County Utility Commission (an agency of the City of Winston Salem), that minority and women-owned business enterprises shall have an equal opportunity to participate in the performance of contracts financed in whole or in part with the City and/or Commission funds.

In accordance with the "Identification of Minority Participation Form", no sub-consultant who is identified and listed on this form may be replaced with a different sub-consultant unless: A) the sub-consultant's proposal is later determined by the consultant to be non-responsible or non-responsive, or the listed sub-consultant refuses to enter into a contract for the complete performance of the work, or

B) With the approval of the City of Winston-Salem's M/WBE Division, good cause has been demonstrated. Prior to substituting a sub-consultant, the Consultant shall identify the substitute sub-consultant and inform the City of Winston-Salem's M/WBE Division of its good faith efforts; including the M/WBE Replacement Request Form.

In order to meet the terms stated above, an M/WBE Replacement Request Form must be completed. Replacement of an MWBE without written approval from the City of Winston Salem MWBE office is a violation of contract provisions and may result in the Consultant being disqualified from submitting proposals on future City and/or Commission projects.

If a committed MWBE sub-consultant is terminated for a good cause, the Consultant will make a Good Faith Effort to find another M/WBE sub-consultant to substitute for the terminated M/WBE. This Good Faith Effort shall be directed at finding another M/WBE to perform at least the same amount of work under the contract as the M/WBE that was terminated, to the extent needed to meet the contract goal established for the project.

**Replacement M/WBE:** \_\_\_\_\_

**Amount of Subcontract:** \_\_\_\_\_

**Work to be performed:** \_\_\_\_\_

**New Committed M/WBE Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

By signing this document, the Consultant, M/WBE, and City of Winston Salem's M/WBE Division acknowledges that the 5 days to respond was given, and concurs with the process of replacing the named M/WBE sub-consultant.

\_\_\_\_\_  
Original M/WBE Signature (where possible) Date

\_\_\_\_\_  
Consultant Signature Date

\_\_\_\_\_  
M/WBE Staff Signature Date

## INSTRUCTIONS FOR SUBMITTAL OF M/WBE REPLACEMENT REQUEST FORM

IN ADDITION TO SUBMITTING THIS FORM, THE CONSULTANT MUST ENSURE THAT THE FOLLOWING STEPS ARE SATISFIED.

1. Prior to starting the replacement process, the consultant is responsible for coordinating with the M/WBE sub-consultant to see if they are willing and able to perform the work as indicated in their contract. If the Consultant notices a reoccurring issue with an M/WBE sub-consultant, the Consultant shall notify the City of Winston Salem M/WBE staff and keep them abreast of the issues.

2. If the M/WBE sub-consultant cannot perform the work or if the Consultant shows good cause for replacement, M/WBE staff will coordinate with the Consultant to begin the M/WBE replacement process. M/WBE staff will coordinate with other City departments as appropriate.

*(Examples of good cause include: M/WBE fails or refuses to execute a written contract; M/WBE fails or refuses to perform the work of its subcontract consistent with normal industry standards; M/WBE fails to meet reasonable, nondiscriminatory bond requirements; M/WBE becomes bankrupt, insolvent, or exhibits credit unworthiness; M/WBE is ineligible to work because of suspension and debarment proceedings; M/WBE voluntarily withdraws from the project and provides written notice; M/WBE owner dies or becomes disabled and is unable to complete its work; or other documented good cause that compels termination. Good cause does not exist where the Contractor terminates a committed M/WBE for failure or refusal to perform the work of the subcontract results from bad faith or discriminatory action of the prime consultant.)*

3. Before requesting the City of Winston Salem's consent for the proposed termination/replacement of an M/WBE, the Consultant shall give written notice of the proposal, including the reason for termination/replacement, to the M/WBE firm with a copy to the City of Winston Salem M/WBE staff. The M/WBE shall be given **five days** to respond unless the five day requirement needs to be reduced, due to public necessity (e.g. safety).

4. After the notice period has passed, the M/WBE staff will ensure the Consultant has submitted all supporting documentation for the M/WBE replacement. Letters, phone logs, emails or any other correspondence between the Consultant, the M/WBE sub-consultant, and/or City staff will be considered supporting documentation. This documentation must provide valid reason(s) for replacement as well as the opportunity to correct the issue. Consultants cannot replace for convenience or perform the work with its own forces or those of an affiliate.

5. Once the Consultant is given approval by the City of Winston Salem M/WBE staff to replace an M/WBE sub-consultant, M/WBE staff will send notification to the City project manager and the City/County Purchasing Department for informational purposes.

6. Signature lines on form: Ideally, the form should contain the signature of the original M/WBE sub-consultant being replaced. However, if this is not possible (i.e. the M/WBE will not sign), the documentation supporting the decision and acknowledgement of the reasons for replacement of the M/WBE sub-consultant should be attached. The form shall also be signed by the replacement M/WBE to show their participation on the project as the new committed M/WBE.