



Internal Audit Office

MAYOR
Oscar Leoser

DATE: February 26, 2021

TO: Robert Cortinas, Chief Financial Officer

CITY COUNCIL

FROM: Edmundo S. Calderon, CIA, CGAP, CRMA, Chief Internal Auditor

District 1
Peter Svarzbein

SUBJECT: Solicitation No. 2021-0043R Review – Project 2021-03

District 2
Alexandra Annello

At your request, the Internal Audit Office conducted a review of Solicitation No. 2021-0043R 457(b) Deferred Compensation Plan Administrator and 401(a) Profit Sharing Plan Administrator. This engagement was accepted based on the engagement’s potential to improve management of risks, add value, and/or improve the organization’s operations (IIA 2010.C1). The work performed does not constitute an engagement conducted in accordance with Generally Accepted Government Auditing Standards (GAS 1.16). The observations and conclusions that are reported in this memorandum do not require Management responses.

District 3
Cassandra Hernandez

Background:

District 4
Joe Molinar

On January 29, 2021 the Chief Financial Officer contacted the Chief Internal Auditor requesting assistance in reviewing Solicitation 2021-0043R. The Chief Financial Officer advised that the Human Resources Department was in the process of awarding a contract to Empower Retirement, LLC as administrator for the City’s 457(b) Deferred Compensation Plan and 401(a) Profit Sharing Plan. Per the Chief Financial Officer, a meeting took place on January 29, 2021, with the Mayor, 2 City Representatives, Representatives from both the Policemen and Firemen Unions, and City Staff. There were concerns voiced over the current Solicitation Process. Therefore, a request was made for the Internal Audit Office to review the Solicitation Process.

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Isabel Salcido

District 6
Claudia L. Rodriguez

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Henry Rivera

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Cissy Lizarraga

On February 1 the current incumbent, Prudential Retirement Insurance and Annuity Company, filed a protest regarding the selection of Empower Retirement, LLC. In their Protest Letter, Prudential disagreed with the scoring of their qualifications regarding the solicitation.

CITY MANAGER
Tommy Gonzalez

Objectives:

Our objectives were the following:

- To determine if any irregularities occurred during the review and evaluation process that would have voided any of the six proposals submitted for Solicitation 2021-0043R.
- To review the six proposals submitted for completeness against Solicitation 2021-0043R requirements.
- It is not our objective to reevaluate the proposals for technical subject matter or to re-score the submitted proposals. The scoring methodology used in scoring the technical components is very subjective in nature. Therefore, we examined the content of evaluations submitted by the scorers for conformance with the requirement of Solicitation 2021-0043R.

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Methodology:

In order to complete this review, we conducted the following:

- Reviewed RFP 2021-0043R to gain an understanding of the procurement.
- Reviewed RFP 2009-097R to review the previous procurement awarded August 25, 2009.
- Reviewed the City Council's Agenda dated February 2, 2021.
- Reviewed Prudential Retirement's City of El Paso Plan Summary as of June 30, 2020.
- Reviewed HUB International Proposal for Deferred Compensation 401(a) & 457(b) Evaluation Services dated November 6, 2020.
- Reviewed HUB International's City of El Paso 457(b) & 401(a) Recordkeeper RFP Analysis dated December 11, 2020.
- Reviewed the 6 Proposals received by the City of El Paso in connection with Solicitation 2021-0043R.
- Conducted an interview with Bruce Collins, Purchasing Department Director.
- Conducted an interview with Mary Michel, Human Resources Assistant Director.
- Conducted an interview with Darrell Ellisor, Senior VP, HUB International, Houston TX.
- Conducted an interview with City Representative Henry Rivera, Financial Oversight & Audit Committee Member.
- Conducted an interview with City Representative Cassandra Hernandez, Financial Oversight & Audit Committee Member.
- Reviewed the Solicitation Scoring Sheets completed by HUB International for Factors A-E for RFP 2021-0043R.
- Reviewed the Solicitation Scoring Sheets completed for City of El Paso's Staff by the Purchasing Department for Factors F-G for RFP 2021-0043R.
- Reviewed the Prudential Retirement's Protest Letter dated February 1, 2021 received by the City of El Paso.

Scope:

We reviewed documents pertaining to Solicitation 2021-0043R from 9-15-2020 to February 1, 2021. We reviewed the RFP, 6 Proposals Submitted, HUB International Proposal for Evaluation Services, HUB International's analysis and score sheets, City of El Paso's Staff Score Sheets, and the Prudential's Protest Letter.



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Results

OBSERVATION #1 Scoring of RFP 2021-0043R

In reviewing the process used in Scoring RFP 2021-0043R, it was determined that an Evaluation Committee was established of 5 City Employees and the firm of HUB International, as a Consultant. HUB International scored the following Factors:

- Factor A, Plan Administration, Maximum Points 20
- Factor B, Services Offered to Employees, Maximum Points 15
- Factor C, Investments Offered to Plan Participants, Maximum Points 20
- Factor D, Administration Services, Maximum Points 15
- Factor E, Cost Recovery and Financial Guarantees, Maximum Points 10

The City of El Paso’s Staff with the assistance of the Purchasing Department scored the following Factors:

- Factor F, Past Performance, Maximum Points 10
- Factor G, References, Maximum Points 10

Total Maximum Points 100

HUB International conducted their review in their Houston, TX Office. It was completed by experienced and knowledgeable HUB International employees. Subject Matter Experts were used by HUB International for each Evaluation Factor. HUB International provided a detailed analysis of their evaluations to the Evaluation Committee. The analysis was dated December 11, 2020. A copy was provided to the Internal Audit Office.

The City of El Paso’s Staff completed their analysis with the assistance of the Purchasing Department. The analysis was very organized, well supported, and informative. The analysis was provided to the Internal Audit Office by the Purchasing Department.

The Internal Audit Office identified no irregularities in this process. Both analyses were well documented and supported as related to the Evaluation Factors.

RECOMMENDATION

None





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OBSERVATION #2 Comparison of RFPs

The Internal Audit Office conducted a comparison of RFP 2009-097R and RFP 2021-0043R. Our objective was to identify any similarities and differences in both RFP 2009-097R and RFP 2021-0043R. Based on the documents and information provided we identified the following:

1. Both RFPs had 7 Evaluation Factors. The 7 Evaluation Factors in RFP 2009-097R were:
 - Factor A, Experience of Proposal Firm, Maximum Points 10
 - Factor B, Proposal Firm References, Maximum Points 10
 - Factor C, Cost Recovery and Financial Guarantees, Maximum Points 5
 - Factor D, Services offered to Employees, Maximum Points 30
 - Factor E, Investments offered to Plan participants, Maximum Points 30
 - Factor F, Administrative Services, Maximum Points 10
 - Factor G, Post Employment Health Plan, Maximum Points 5

Total Maximum Points 100

The 7 Evaluation Factors for RFP 2021-0043R were identified in Observation #1. In comparing both RFPs, we identified 6 factors were common between both. There was 1 Factor different for each RFP; RFP 2009-097R had a Post Employment Health Plan Factor and RFP 2021-0043R had a Plan Administration Factor. The Internal Audit Office was unable to speak to any City employees connected to RFP 2009-097R to gain an understanding of the basis for the factors, those employees have either retired or left employment with the City of El Paso.

2. Each RFP had a Question & Answer Component. Questions were asked by the Proposers and answered by the City Purchasing Department. No differences noted in this area.

3. In reviewing RFP 2009-097R, 9 references were required under Factor B – Proposed Firm References. Maximum 10 points. The references were categorized as follows:
 - Three references (name, title, phone number) of current clients who sponsor governmental 457(b) deferred compensation plans....
 - Three references (name, title, phone number) of current clients who sponsor governmental defined contribution plans....
 - Three references (name, title, phone number) of former governmental deferred compensation plans....

In comparing the above to RFP 2021-0043R, which required a total of 6 references under Factor F – Past Performance & Factor G – References. Maximum 10 Points each for a total of 20 points.

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- Factor F required three comparable contracts completed or in progress with the City and/or any other Government entities or private sector firms for the past 5 years. Maximum 10 points.
- Factor G required three references of projects comparable in size and complexity to the requirements delineated with this solicitation. Maximum 10 points.

There is a difference in the number of references required for each RFP, 9 versus 6. The type of references required for both are also different. We are unable to determine the purpose for the references required in RFP 2009-097R, since those involved are no longer actively employed with the City of El Paso. The reference requirements in RFP 2021-0043R appear to be appropriate for this type of solicitation.

4. RFP 2009-097R Evaluation Committee had a different make-up when compared to RFP 2021-0043R Evaluation Committee. Refer to Observation #1 for a description of RFP 2021-0043R Evaluation Committee. RFP 2009-097R Evaluation Committee consisted of the following:

- City of El Paso’s Office of Management & Budget Director
- Associate Accountant, El Paso Water Utility
- Representative, El Paso Municipal Police Officers Association
- Representative, City of El Paso’s City Employees’ Pension Fund
- Representative, Local 51, International Association of Firefighters, Inc.
- Consultant, The Hay Group, Philadelphia, PA
- Consultant, Cornerstone Companies, Bethlehem, PA

The make-up of the Evaluation Committees for both RFPs was established differently. RFP 2009-097R Evaluation Committee had the representation of City Employees, Interested Parties, and Consultants. RFP 2021-0043R had the representation of City Employees and Consultants; but no interested parties.

RECOMMENDATION

The make-up of the Evaluation Committees was established differently when compared between RFP 2009-097R & RFP 2021-0043R. The make-up of the Evaluation Committees is not wrong, just different. The Purchasing Department Director has stated “Best Practices” in his response to this Observation. We recommend the readers of this report review the “Management Responses” listed after this report to gain an understanding of the decision process used in deciding the make-up of the Evaluation Committees.





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OBSERVATION #3 Factor F – Past Performance & Factor G – Reference

The Internal Audit Office conducted a review of Factor F – Past Performance & Factor G – References requirements on RFP 2021-0043R.

Factor F – Past Performance required the Proposers to provide *“three comparable contracts completed or in progress with the City and/or any other Government entities or private sector firms for the past five years.”* The three comparable contracts required contact information to be provided in a prescribed format as listed in the Solicitation.

In reviewing the Score Sheet, we identified that 3 out of 6 Proposers earned points and 3 out of 6 Proposers did not earn points for Factor F. Lincoln Retirement and ICMA Retirement Corp earned 10 points. Empower Retirement earned 6.67 points. Prudential Retirement, VOYA Institutional Plan, Massachusetts Mutual did not earn points. It was determined in our review, Prudential Retirement, VOYA Institutional Plan, and Massachusetts Mutual did not provide contact information in the required format as listed in RFP 2021-0043R. For Empower Retirement, the Purchasing Department was able to confirm 2 out of the 3 contacts information, thus earning 6.67 points. Lincoln Retirement and ICMA Retirement satisfied Factor F requirements and earned 10 points each.

The Internal Audit Office did not identify any irregularities in Factor – F. Unfortunately, the 3 Proposers mentioned above did not provide Contact Information in the required format as required in the Solicitation, thus earning zero points.

Factor – G References, required the Proposers to provide *“three references of projects comparable in size and complexity to the requirements delineated within this solicitation.”* The three references were required to be provided in a prescribed format listed in the Solicitation.

In reviewing the Score sheet, every Proposer earned points in this category. Empower Retirement, Prudential Retirement, and VOYA Institutional earned 10 points each. Lincoln Retirement earned 9.33 points. ICMA Retirement earned 6.67 points. Massachusetts Mutual earned 6.00 points. By reviewing the Purchasing Department analysis, points were earned by the type of reference received.

The Internal Audit Office did not identify any irregularities in Factor G.

RECOMMENDATION

None





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OBSERVATION #4 Confidential Documents and Information

While conducting interviews for this review, the topic of confidential documents was mentioned on numerous occasions. During our review, we identified 2 documents that were either marked “Confidential” or contained verbiage indicating the information was considered “Proprietary”.

The first document identified was provided by Prudential Retirement in their Proposal. The document was in response to Factor F – Past Performance. The document is titled, *“Prudential Client List.”* Prudential Retirement considered the names of their clients as proprietary and therefore did not provide their client’s names or contact information. This information was a required component for Factor F. This resulted in Prudential Retirement earning zero points for Factor F. More information is provided in Observation #3 of this memorandum.

The second document identified was also provided by Prudential Retirement (as the incumbent) in response to Question #16 of the Question & Answer (Q&A) portion of the solicitation. Question #16 stated “What is the current recordkeeping fee for the plan today?” The document is titled, *Prudential Estimated Revenue Available for Recordkeeping Expenses*, as of 6/30/2020. In examining email exchanges between the City’s Human Resources Assistant Director and Prudential Retirement’s Vice-President for Key Accounts, the data contained in the document was discussed and decided to be used as a response to Question #16. The document was included in Amendment A002 and made available to all Proposers.

The data was provided to the City as a response to a Proposer’s question with no objections from Prudential Retirement. Copies of the emails were obtained by the Internal Audit Office.

RECOMMENDATION

Care, awareness, and caution must be used when handling documents marked “Confidential” and/or “Proprietary” information. No irregularities were noted in our review of the confidential or propriety documents contained in this Solicitation.





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OBSERVATION 5 Typographical Errors in RFP 2009-097R & RFP 2021-0043R

In evaluating the content of the Request for Proposals (RFP) 2009-097R and RFP 2021-0043R, the Internal Audit Office identified two Typographical Errors.

The Internal Audit Office reviewed RFP 2009-097R in order to establish a basis for the award of RFP 2021-0043R. On August 25, 2009, RFP 2009-097R awarded the Administration of the 457(b) & 401(a) Plans to Prudential Retirement. The first Typographical Error identified is listed in Section B, Page 2, Item F, #2 of the RFP 2009-097R which states:

“Contract(s) will be awarded for an initial five (5) year period beginning January 1, 2010 through December 31, 2015. In addition and upon mutual agreement, the contract(s) contains the option to renew for two additional three (3) year periods.”

The time frame mentioned in Item F, #2 is for 6 years. So, this prompted us to verify the Contract Timeframe. In reviewing City Council’s Meeting Minutes, we were able to identify the following:

- City Council’s Meeting Minutes of August 25, 2009 approved a 5 Year Award. Although the time frame in RFP 2009-097R listed is a 6-year period, the award was only for 5 years from January 1, 2010 to December 31, 2014.
- City Council’s Meeting Minutes of December 9, 2014 authorized the Purchasing Department to exercise the City’s Option to extend Contract 2009-097R for 3 additional years from January 1, 2015 to December 31, 2017.
- City Council’s Meeting Minutes of December 19, 2017 authorized the Purchasing Department to exercise the City’s Option to extend Contract 2009-097R for 3 additional years from January 1, 2018 to December 31, 2020.

Based on the information reviewed, we found the Time Frame for Award for RFP 2009-0097R to be appropriate. Therefore, the start date of January 1, 2021 for the Award on RFP 2021-0043R is also appropriate.

The second Typographical Error identified is listed in RFP 2021-0043R Page 31 under EVALUATION FACTOR G – References. The last sentence in this section contains a mathematical formula for scoring the confirmation of References.

“10 total points ÷ 3 = 1.67 points per reference”

The correct formula should be:

“10 total points ÷ 3 = 3.33 points per reference”

This typographical error did not cause any scoring differences.

RECOMMENDATION

None

Page 8

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Conclusion

The Internal Audit Office conducted a thorough review of Solicitation 2021-0043R and determined that no major irregularities occurred in the Evaluation Process. We did not attempt to re-score the Solicitation Proposals, as the scoring process is very subjective in nature. Our objective was to review the Evaluation Process and identify pertinent facts.

Listed below is a short restatement of the highlights identified for each of our Observations.

- **Observation #1** – Evaluated the process used in scoring RFP 2021-0043R Evaluation Factors and no irregularities were noted. We found a fair, well documented and well-supported Evaluation Process.
- **Observation #2** – Found consistency with establishing the Evaluation Factors in RFP 2009-097R and RFP 2021-0043R. Identified both Solicitations had a Question and Answer component. There was a difference in the number of References required for each Solicitation, 9 references in RFP 2009-097R versus 6 references in RFP 2021-0043R. Identified a difference in the make-up of the Evaluation Committees from RFP 2009-097R to RFP 2021-0043R.
- **Observation #3** – Our review identified that for Factor F – Past Performance, 3 out of 6 Proposers did not submit contact information in the required format listed for Solicitation RFP 2021-0043R. Therefore 3 out of 6 Proposers did not earn points for Factor F. For Factor G – References, all 6 Proposers submitted sufficient information to earn points in this category.
- **Observation #4** – After examining documents marked “Confidential” or “Proprietary”, we determined no unauthorized “Confidential” documents were released. Emails obtained by the Internal Audit Office, demonstrated that Prudential Retirement did not object to releasing the document. A document submitted by Prudential Retirement in their Proposal was marked “Proprietary”, which was recognized and honored. Unfortunately, Prudential Retirement did not earn points for Factor F – Past Performance due to not providing Client’s contact information.
- **Observation #5** – During our review, we identified 1 typographical error each within Solicitation 2009-097R and Solicitation 2021-0043R, respectively. Each typographical error appears to be clerical in nature and did not have a mathematical impact on either solicitation.

If you have any questions please feel free to contact me at extension 212-1365.

cc: Tomas Gonzalez, City Manager
Financial Oversight & Audit Committee
Robert Cortinas, Chief Financial Officer
Bruce Collins, Purchasing Department Director

Page 9

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DELIVERING EXCEPTIONAL SERVICES

Solicitation 2021-0043R Review
Management Responses



Purchasing & Strategic Sourcing Department

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INTER-OFFICE CORRESPONDENCE

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Tommy Gonzalez

DATE: March 4, 2021

TO: Edmundo S. Calderon, CIA, CGAP, CRMA
Chief Internal Auditor

FROM: Bruce D. Collins, CPPO
Director, Purchasing & Strategic Sourcing

THUR: Robert Cortinas
Chief Financial Officer

SUBJECT: Solicitation No. 2021-0043R Review-Project 2021-03

This communication serves to provide feedback on our review of the draft report on the subject item. Our feedback and comments correspond to the numbers assigned for the observations.

Again, thank you for the opportunity to review and provide feedback on the draft. The feedback is as follows:

Observation #2 – Comparison of RFPs

Observation 2 #4, Evaluation Committee Make-Up

Feedback:

1. We disagree with the recommendation that make-up of the evaluation committee should be composed of same structure of the previous award. Best practices that the composition of evaluation committees should be done based on those who are able and qualified to fairly evaluate the solicitations and not because of the previous make-up of past committees. In most cases a chair or lead of the evaluation committee is the contract administrator or senior member of the committee. All members of the committee have equal votes.

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Purchasing & Strategic Sourcing Department

MAYOR
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March 4, 2021
Page 2
Draft Report - Solicitation No. 2021-0043R Review-Project 2021-03

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Peter Svarzbein

Observation #2 – Comparison of RFPs (Continued)

District 2
Alexandra Annelo

2. We disagree that the make-up of the evaluation committee should remain the same as the previous evaluation committee. In this case the third-party consultant conducted the evaluation on all but two factors. The remaining two factors (verification of references and comparable projects) were conducted by P&SS.

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Cassandra Hernandez

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3. The recommendation does not acknowledge that (i) the scope of services for contracts being renewed in most cases are 3,5 and, in this case, 10-year-old. Consequently, the scope of service may need to adjust for current market conditions, new entrants into the market, expectation of the City's customers and City employees;

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4. The subject matter experts for said services should be entitled to make improvements and/or updates to the evaluation factors for replacement contract.

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5. Requiring the same number of references in each solicitation, especially those separated by ten years, is not a best practice. The State Local Government Code requirements for a RFP, are primarily that the solicitation must identify (i) the evaluation factors and (ii) relative weight of each factor. Abbreviated. Having fixed evaluation factors lead to the failure in the San Jacinto Plaza award. Council subsequently revised the CSP policy wherein the selection of evaluation factors and weight are established on a case-by-case basis and the responsibility of user department and Purchasing.

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March 4, 2021
Page 3
Draft Report - Solicitation No. 2021-0043R Review-Project 2021-03

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Peter Svarzbein

Observation #3 – Factor F-Past Performance & Factor G – References
Observation 3, References

District 2
Alexsandra Anello

Feedback:

District 3
Cassandra Hernandez

Recommend include a notation that the RPF it clearly states (i) offeror’s should contact their references in advance and advise them the City will be performing a reference check; (ii) how references will be contacted (email and telephone) and the (iii) number of attempts which will be made by the City”.

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Observation #5 – Typographical Errors
Observation 5, Typographical Error RFP 2021-0043R

District 6
Claudia L. Rodriguez

Feedback:

District 7
Henry Rivera

Recommend a notation be added that “although the formula within the example had a typo, the scoring documents reviewed by your office show that the formula was applied consistently and correctly”.

District 8
Cissy Lizarraga

Thank you again for affording me, the opportunity to review the draft and provide feedback.

CITY MANAGER
Tommy Gonzalez

Sincerely,

Bruce D. Collins, CPPO

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