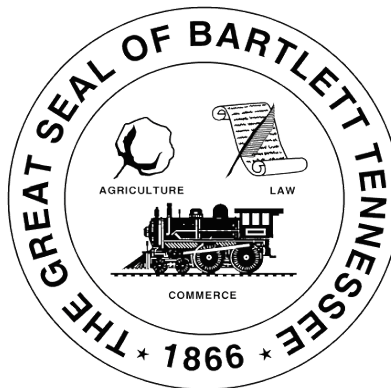


CITY OF BARTLETT

***MAYOR'S OFFICE
6400 STAGE ROAD
BARTLETT, TENNESSEE 38134***

David Parsons, Mayor
Steve Sones, Chief Administrative Officer
Kevin Franz, IT Director



REQUEST FOR QUALIFICATIONS

RFQ # FY2026-08-007

DUE: Friday September 12, 2025, no later than 2:00 p.m. (CST)

Addendum #1 - Questions/Answers

PROFESSIONAL COST REDUCTION CONSULTING SERVICES

The City of Bartlett is soliciting written requests for qualifications, on a competitive basis from qualified companies or professionals to provide Professional Cost Reduction Services – City-Wide contracts and categories.

1. On page 3, states "The proposer shall also provide three (3) references from municipal governments, county governments, or similar organizations where comparable services have been performed (see Exhibit B)." Then on page 17 section 3 for References "a. Include at least three (3) other clients for whom the Proposer has provided services."

My question is, are you looking for a total of 6 references or a minimum of 3?

City answer: 3 references total are sufficient

2. My other questions are related to insurance. In the consultant space we do not typically have clients request some of this coverage. Understandable if contractors are on site doing work such as construction, but for consultant work, not on site, it might not be necessary.
 - a. An Auto Policy of \$1M is beyond what most consultants carry. Especially now, driving is a very minor or even not applicable to the services offered. Members of our team are across the country and only a core TN-based team would need to visit the city in person; will this still be required in order to provide services?

City answer: \$500,000 is sufficient

- b. Professional Liability is very important for some professional positions the City may conduct an RFP for, but for a general cost consultant there are very few situations that would raise a claim of any kind. We carry \$1M as a standard but as it is a niche industry finding additional coverage may be difficult as there are no policies specific to this industry, is this requirement set in stone?

City answer: Will keep as is, company awarded contract will need to provide proof after award.

Subject	Question	RFP Reference
Performance-Based Model	How does the city define and verify "actual, hard-dollar savings"?	Introduction pg. 3 Services pg. 7 If costs savings per contract are less than previous year.
Performance-Based Model	What is the expected frequency or format of savings reports or progress updates?	Introduction pg. 3 Services pg. 7 Propose that in your response
Scope of Work	What specific cost categories or departments will be	Scope of work pg. 6

	prioritized in the assessment (e.g., utilities, telecom, office supplies)?	
Scope of Work	Are there any existing contracts or vendors the City intends to exclude from the review, beyond the noted franchise fees?	Scope of Work pg. 6 This was taken out of the RFQ. I think they downloaded a previous copy - KF
Evaluation Criteria & Process	Can the City elaborate on how "cost to the City" will be evaluated given the performance-based fee structure?	Proposal Evaluation and Award pg. 17 City anticipates cost being a percentage of the savings for a set period of time.
Insurance Requirements	Are certificates of insurance required at RFP submission or only upon award?	Insurance Requirements pg. 13 Upon Award
Other	Is there any expectation for on-site work, or can services be delivered remotely?	N/A Remotely is fine

1. **Focus Areas:** Could the City describe the primary focus areas of anticipated cost reductions (e.g., procurement, utilities, contracts, operations), and share whether insights into spending patterns - such as consolidated vendor analytics - are within scope? City wants to cast a wide net and have the company identify potential cost savings that the City may have overlooked.
2. **Data Access:** Will the City be able to provide access to historical purchasing, contracts, and invoice data to support analysis of long-term savings potential, or does the City prefer solutions that operate on a standalone or vendor-provided data basis? City would provide historical invoicing data so company could suggest possible savings.
3. **Evaluation Criteria:** Beyond basic qualifications, could the City clarify how proposals will be evaluated - specifically, will the evaluation be based on best value or lowest price technically acceptable? Additionally, how does the City view the value of enhanced analytic capabilities such as spend visibility, contract centralization, and continuous savings identification? City will evaluate based on potential savings company might provide. With this being a performance-based request, City anticipates cost being a percentage of the savings for a set period of time. Visibility such as dashboards etc would benefit company.

4. **Will the City please clarify or remove the requirement for Exhibit A, Drug and Alcohol Testing Acknowledgement Statement and Affidavit?** Our counsel informs us it is not possible to determine whether our policy is more or less stringent than the City of Bartlett. However, we do operate under a federally approved drug-free workplace plan. Will the City accept an attestation that we are operating under a federally approved plan? Or, in the alternative, will the City remove the requirement, or clarify exactly what is required to comply? **City's Drug and Alcohol Policy is attached to this addendum for review.**
5. **Will the City please remove or waive the requirement for the proposal to be submitted in hard copy?** We note that many municipalities and agencies we work with are eliminating hard-copy requirements of this type to save on cost and reduce waste. Will the City accept delivery by email instead? **Yes, email would be acceptable**
6. **Will the City please clarify the size and character of the expense categories that the selected firm will identify cost-saving opportunities within?** This may impact various elements such as the time schedule and assumptions in the methodology. In particular:
 1. What is the approximate annual value (\$M) of the indirect expense categories the City of Bartlett expects to be analyzed to identify, validate, and implement cost-saving opportunities? **Guestimate would be up to \$20M.**
 2. Are these expense categories solely within the General Fund, or will they also include categories in other funds? Will the Bartlett School Fund be included? **Categories in other funds may be pertinent, however Bartlett School Fund not included.**
 3. Will capital expenditures be included, or will only operating expenditures be included? **Only operating expenditures**
 4. We assume based on the service description of "indirect expense categories" that all personnel-related costs (salary, benefits, fringe, retirement funds, etc.) are excluded. Will the City please confirm this? **Confirmed**

CHAPTER 10: ALCOHOL AND SUBSTANCE ABUSE POLICY

10.1 BACKGROUND

The City of Bartlett has a legal responsibility and management obligation to ensure a safe work environment, as well as paramount interest in protecting the public by ensuring that employees are mentally, physically and emotionally fit to perform their assigned duties. The City and the employee could be found liable if the City fails to assure that employees can perform their duties without endangering themselves, other employees or the public.

There is sufficient evidence to conclude that the use of illegal or banned substances, including drugs or those substances that create the same effect as those drugs; the abuse of prescription medications, including the mixing of similar medications; the illegal use or abuse of alcohol; or drug or alcohol dependence; can impair an employee's performance and general physical and mental health.

10.2 POLICY

The possession and/or use of illegal drugs or the excessive use of alcohol by an employee of the City of Bartlett is a crime in this jurisdiction and clearly unacceptable. Therefore, the City of Bartlett has adopted this written policy to ensure an employee's fitness for duty as a condition of his/her employment. All City employees are employees at will.

A. City employees shall not take or be under the influence of any drug or dangerous substance unless prescribed by the employee's licensed physician. An employee who is required to take prescription medicine that may limit their ability to perform any assigned job task shall notify their immediate supervisor of the medication prescribed and the duration of time the employee is expected to be taking the medication.

Such notification is of special importance for Fire and EMS personnel, Law Enforcement personnel (including jailers and dispatchers) and any employee assigned to drive a city vehicle or equipment. Failure to notify is a violation of this policy and the employee is subject to disciplinary action, up to and including termination.

B. City employees are prohibited from the use, possession, manufacture, distribution, and/or sale of drugs, or any other controlled substance on or off the job. Any violation will be subject to disciplinary action as set forth in #10.12 and 10.13 of this section.

C. Any City employee who has reason to believe that another employee is using illegal drugs, abusing alcohol or prescription drugs, or illegally in possession of drugs or alcohol shall report the facts to management immediately. Failure to do so is a violation of this policy and is subject to disciplinary action up to and including termination.

D. Any employee convicted of an off-duty drug or alcohol-related crime will be deemed to be in violation of this policy and subject to disciplinary action up to and including termination.

E. The City will comply with current published regulations of the U.S. Department of Transportation as they relate to employees licensed to operate vehicles or equipment with a loaded capacity of 26,000 lbs. or more.

F. All property belonging to the municipality including computers is subject to inspection at any time without notice as there is no expectation of privacy in such property.

1. Property includes, but is not limited to, vehicles, desks, containers, files, and storage lockers.
2. Employees assigned lockers (that are locked by the employee) are also subject to inspection by the employee's supervisor after reasonable advance notice (unless waived by the Mayor or Chief Administrative Officer) and in the presence of the employee.

G. As a condition of continued employment with the City, all employees must abide by the City's policy and notify their immediate supervisor of any criminal drug statute convictions within five (5) work days after such conviction. The City, in turn, is required to inform any granting or contracting agency within ten (10) work days of such notification, if applicable.

H. Failure to comply with the provisions or intent of this policy will be grounds for disciplinary action up to and including termination. Certain employees may be required to complete an approved employee assistance or rehabilitation program.

K. The City shall provide written notice of its Alcohol and Substance Abuse Policy to all employees.

10.3 DRUG TESTING

It is the City's policy to require a drug test in the following situations:

1. New Employee (Post job offer test).
2. Random under U.S. DOT regulations.
3. Random with approval by the Mayor.

4. When an employee is involved in an at-fault vehicle or equipment accident while in the course of work for the City.
5. When the Department Director determines there is reasonable suspicion or reasonable cause to warrant testing.

10.4 DRUGS & ALCOHOL SCREENING SUBSTANCES

When drug and alcohol screening is required under the provisions of this policy, a urinalysis test will be given to detect the presence of the drug groups listed below, and alcohol will be tested for using a DOT-approved evidential breath testing instrument. Following DOT Testing rules, having a blood alcohol concentration (BAC) of 0.04% or greater will be considered as a level that is positive. This provided list is not intended as an exhaustive inventory of every drug for which an employee can be tested. The selection of drugs subject to testing will be based on the ability of each drug to affect job performance and on known abuse in the community, which can include but is not limited to:

1. Alcohol
2. Amphetamines
3. Barbiturates
4. Benzodiazepines
5. Buprenorphine
6. Cocaine
7. Marijuana
8. Methadone
9. Opiates / Opioids
10. Oxycodone
11. Phencyclidine
12. Other illegal substances, as requested by the City

10.5 VOLUNTARY DISCLOSURE OF DRUG AND/OR ALCOHOL USE

No disciplinary action may be taken pursuant to this drug policy against employees other than a Fire, EMS, Law Enforcement (including jailer and dispatcher), water safety employee, or classroom instructors who voluntarily identify themselves as drug or alcohol abusers, obtain counseling and rehabilitation through the City of Bartlett's Employee Assistance Program or other program sanctioned by the City of Bartlett, and after that refrain from violating the City of Bartlett's policy on drug and alcohol abuse. However, voluntary identification will not prohibit disciplinary action for violating the City of Bartlett personnel policies and procedures outside of what is being disclosed.

For Fire, EMS, Law Enforcement (including jailer and dispatcher), water safety employees, and classroom instructors, no disciplinary action may be taken pursuant to this drug policy against such employees who voluntarily identify themselves as prescription drug or alcohol abusers, obtain counseling and rehabilitation through the

City of Bartlett's Employee Assistance Program or other program sanctioned by the City of Bartlett, and after that refrain from violating the City of Bartlett's policy on drug and alcohol abuse. However, voluntary identification will not prohibit disciplinary action for violating the City of Bartlett personnel policies and procedures outside of what is being disclosed.

These provisions apply to voluntary disclosure of a substance abuse problem by any employee of the City of Bartlett. The voluntary disclosure must occur before an employee is notified of or otherwise becomes subject to a pending drug and/or alcohol test. An employee with a positive, confirmed test for drugs or alcohol is subject to disciplinary action up to and including termination of employment. Voluntary disclosure provisions do not apply to applicants.

Leave for substance abuse treatment will be counted as family and medical leave to the extent the employee is eligible for such leave. Employees not eligible for FMLA leave are entitled to an unpaid leave of up to thirty (30) consecutive calendar days for substance abuse treatment. The employee must first exhaust all vacation, sick, and compensatory time available.

Prior to any return-to-duty consideration of an employee following voluntary substance abuse treatment, the employee shall obtain a return-to-duty recommendation from the City of Bartlett's substance abuse professional. The substance abuse professional may suggest conditions of reinstatement of the employee, including after-care and return-to-duty and /or random drug and alcohol testing requirements. The Department Director and Personnel Director of the City of Bartlett will consider each case individually and set forth final reinstatement conditions to active duty. The employee must meet these conditions of reinstatement.

Failure to complete treatment, follow-up care conditions, or the failure of any drug or alcohol screening required by the City of Bartlett or the care provider will result in disciplinary action, including termination of employment. Applicants for all employment classes with the City will be required to undergo a drug screening upon the offer of employment.

Employees are allowed one (1) instance of Voluntary Disclosure during their employment with the City.

10.6 CONSENT

All applicants for employment with the City of Bartlett are made aware of required drug testing by a statement on the application form, and the applicant acknowledges understanding when signing the application. Before a drug screening is administered, employees and job applicants are asked to sign a consent form at the test site authorizing the test and permitting the release of test results to those City officials with a need to know. The consent form shall also provide space for

employees and applicants to indicate current or recent use of prescription or over-the-counter medication.

10.7 JOB APPLICANT TESTING: GENERAL STANDARD

Applicants for all classes of employment with the City will be required to undergo a drug screening upon the offer of employment and prior to their final appointment.

10.8 EMPLOYEE TESTING: REASONABLE SUSPICION

The City may require a current City employee to undergo drug and alcohol testing if there is reasonable suspicion that the employee is under the influence of drugs or alcohol during working hours, or there is reasonable information that the employee is involved in illegal drug use, prescription drug abuse, or excessive use of alcohol off the job.

Reasonable suspicion means a belief based on specific facts and reasonable inferences drawn from those facts that an employee is under the influence of drugs or alcohol on the job or abusing drugs or alcohol off the job. Circumstances which constitute a basis for determining reasonable suspicion may include, but are not limited to:

1. A pattern of abnormal or erratic behavior;
2. Information provided by a reliable and credible source;
3. A work-related accident;
4. Direct observation of drug or alcohol use; or
5. Presence of the physical symptoms of drug or alcohol use (i.e., glassy or bloodshot eyes, alcohol odor on breath, slurred speech, poor coordination and/or reflexes).

Supervisors are required to detail in writing, the specific facts, symptoms, or observations that formed the basis for their determination that reasonable suspicion existed to warrant the testing of an employee. This documentation shall be forwarded to the appropriate Department Director or designated alternate.

10.9 REFUSAL TO CONSENT: APPLICANT

A job applicant who refuses to consent to a drug screening will be denied employment with the City.

10.10 REFUSAL TO CONSENT: EMPLOYEES

An employee who refuses to consent to, or unnecessarily postpones a drug and/or alcohol test when reasonable suspicion of drug or alcohol use has been identified, is subject to disciplinary action up to and including termination. The reason(s) for the

refusal or delay shall be considered in determining the appropriate disciplinary action, if any.

10.11 CONFIRMATION OF TEST RESULTS

When an employee or job applicant's drug test yields a positive result, the testing agency shall administer a second test using a gas chromatography/mass spectrometry test. The second test shall use a portion of the same test sample provided by the employee or applicant for use in the first test.

If the second test is confirmed as a positive test result by the Medical Review Officer (MRO), the employee or applicant shall be notified of the results by the testing agency or appropriate Department Director or designated alternate after confirmation from the Medical Review Officer. The individual will be made aware of the particular substance found and its concentration level.

10.12 CONSEQUENCES OF A CONFIRMING POSITIVE TEST RESULT: JOB APPLICANTS

Job applicants will be denied employment with the City if their initial positive test results have been confirmed by a second test. Applicants shall be informed if they are rejected on the basis of confirmed positive drug test results.

10.13 CONSEQUENCES OF A CONFIRMING POSITIVE TEST RESULT: CURRENT EMPLOYEES

If a current employee's positive test result has been confirmed by the second test, the employee is subject to disciplinary action up to and including termination. Factors to be considered in determining the appropriate disciplinary response include: the employee's job assignment, work history, length of employment, current job performance, and record of prior disciplinary action.

10.14 THE RIGHT TO A HEARING

If an employee's positive test results have been confirmed, the employee is entitled to a departmental administrative hearing before any disciplinary action is finalized. The employee may have legal representation present, but the representative will not be allowed to participate during this administrative process.

If disciplinary action is taken, the employee can appeal any action taken as a result of a drug/alcohol test to the City's Grievance Review Board. This appeal must be made in writing to the Mayor or Personnel Director within five (5) workdays of receiving notice of the discipline. Employees may be represented by legal counsel, present evidence and witnesses on their behalf, and confront and cross-examine the evidence and witnesses used against them. The time limitations for scheduling a

Review Board hearing and the rendering of a written decision by the Board are set forth in Chapter 13, Complaint and Grievance Procedures, in this Personnel Policy.

10.15 MANDATORY EMPLOYEE ASSISTANCE PROGRAM REFERRAL

- A. Upon the first confirmed determination that an employee, other than a Fire, EMS, Law Enforcement (including jailer and dispatcher), water safety employee, or classroom instructor, has tested positive for drugs and alcohol, the City shall refer the employee to an Employee Assistance Program (EAP) for assessment, counseling, and rehabilitation. The employee is expected to cooperate fully with the EAP and complete the program recommended by the EAP.
- B. Failure to report to the EAP, failure to cooperate, or the failure of a subsequent drug or alcohol test while employed by the City will be grounds for termination.
- C. Employees attending counseling and rehabilitation may take sick leave, vacation, compensatory time, or be given a leave of absence without pay.
- D. Employees assigned to drive City equipment or a City vehicle will be removed from driving status, even if such requires a position and/or pay downgrade, and will be directed to the EAP for assessment.
- E. There will be no second referral to the Employee Assistance Program because of positive drug or alcohol tests.

10.16 CONFIDENTIALITY OF TEST RESULTS

All information from an employee's or applicant's drug and alcohol test is confidential and only those individuals with a need to know are to be informed of test results. Disclosure of test results to any other person, agency, or organization is prohibited unless written authorization is obtained from the employee or applicant. The results of a positive drug test shall not be released until the results are confirmed by the second test. The records of unconfirmed positive test results and negative test results shall be destroyed by the testing laboratory.

10.17 LABORATORY TESTING REQUIREMENTS

All drug and alcohol testing of employees and applicants shall be conducted at medical facilities or laboratories selected by the City and shall be done by accredited laboratories certified by the National Institute on Drug Abuse (NIDA), an arm of the U. S. Department of Health and Human Services. Factors to be considered by the City in selecting a testing facility include:

- A. Testing procedures which ensure privacy to employees and applicants consistent with the prevention of tampering; methods of analysis which ensure reliable test results, including the use of gas chromatography/mass spectrometry to confirm positive test results;
- B. Chain-of-Custody procedures which ensure proper identification, labeling, and handling of test samples; and
- C. Retention and storage procedures which ensure reliable results on confirmatory test of original samples.

10.18 EXCEPTIONS

This policy does not apply to an employee's exposure or possession of alcohol and/or illegal drugs in the context of an authorized work assignment (i.e., police, fire or EMS duties, undercover law enforcement operations, intoxilyzer demonstrations, etc.). In all cases of exposure to illicit drugs or substances that may be harmful to an employee's health, the individual must report the incident to their Department Director, through their effective chain of command, and the City's Health and Safety Officer.