



CITY OF MADISON • FINANCE DEPARTMENT • PURCHASING SERVICES

Non-Competitive Selection Request

Date: 02/08/2023

Requisition Number: (8 characters)

Requestor Name: Yolanda Shelton-Morris

Requestor Phone Number: 6082666563

Requestor Email: yshelton-morris@cityofmadison.com

Fund: 1210 COMMUNITY DEVELOPMENT GRANTS

Agency: 62 COMMUNITY DEVELOPMENT

- Major:
- ☐ 53*** Supplies/Goods
 - ☐ 541** Utilities
 - ☐ 542** Building/Facility Maintenance/Repair
 - ☐ 543** Software/Equipment Maintenance/Repair
 - ☐ 544** Public Works Maintenance/Repair
 - ☐ 545** Training/HR-Related Services
 - ☒ 546** Consulting/Professional Services
 - ☐ 548** Grants/Loans/Insurance/Other Services

Total Purchase Amount: \$85,000.00

Vendor Name: EQT By Design

Product/Service Description: Consultant Services

☐ **\$50,000 and UNDER**
This form will be sent to the Purchasing Supervisor for review.

☒ **OVER \$50,000**
Complete this form and draft a resolution using the sample resolutions provided by the City Attorney to your Budget Analyst. **Your resolution will not be added to the Finance Committee agenda without this form.**

Check the box(es) for the exception criteria you feel are applicable:

- ☐ 1. Public exigency (emergency) will not permit the delay incident to advertising or other competitive processes.
- ☒ 2. The services or goods required are available from only one person or firm (i.e., **true** sole source).
- ☐ 3. The services are for professional services to be provided by attorneys.
- ☐ 4. The services are to be rendered by a university, college, or other educational institution.
- ☐ 5. No acceptable bids have been received after formal advertising.
- ☐ 6. Service fees are established by law or professional code.

- ☐ 7. A particular consultant has provided services to the City on a similar or continuing project in the recent past, and it would be economical to the City on the basis of time and money to retain the same consultant.
- ☐ 8. Otherwise authorized by law, rule, resolution, or regulation. Explain:
- ☐ If procurement is being paid with Federal or State grant funds, the vendor was identified by name in the approved Grant Application. (OPTIONAL)

REASON FOR REQUEST

WHY A COMPETITIVE SELECTION PROCESS CANNOT BE USED:

Provide **detailed** explanation below. For a true sole source, provide all information to explain why this product or service can only be purchased from this vendor. For one-of-a-kind items not sold through distributors, explain the unique performance features of the product requested that are not available from any other product. For services, detail the unique qualifications this vendor possesses, or other reason(s) that meet the criteria selected above. Identify specific, measurable factors and qualifications.

In 2022, the CDD issued a Request for Proposals (RFP) to identify a third-party consultant to help evaluate current services, engage community stakeholders, and craft strategies designed to help reach a more diverse population of older adults. The RFP was deemed unsuccessful because it elicited only a single response from an out-of-state firm with little experience with or exposure to Madison's community of older adults. EQT By Design is a skilled and experienced consultant in Madison that specializes in equity-centered community engagement, strategic planning, change management, and organizational culture design within government, community, and the corporate and nonprofit sectors. The services sought by the CDD require strong background and experience in elevating historically marginalized voices and perspectives to further equity-centered policy and systems change. EQT By Design has successfully performed services to gather, analyze and provide recommendations that helped build and implement strategic initiatives focused on equity-centered change for over 25 years. Thus, CDD desires to enter into a sole source contract with EQT By Design for surveying, and performing data analysis and research services beginning March 1, 2023, to December 31, 2023; and,

COMMENTS REGARDING PURCHASES OVER \$50,000

The City of Madison has paid EQT by Design a total of \$102,402.50 since 2017. Of that, \$10,000 was competitively selected through an informal selection process; \$90,749 was non-competitively selected, and \$1,653.50 was under the threshold for competitive selection.

Date:

Submit