



City of Burleson

REQUEST FOR QUALIFICATIONS

Qualification Reference Number: 2020-005

Project Title: Oil and Gas Management Services

Qualification Due Date: September 17, 2020

TABLE OF CONTENTS

Table of Contents	Page 2
Request for Qualifications	
(1) Introductions	Page 3
(2) Payment Terms.....	Page 3
(3) Notice to Award.....	Page 3
(4) Estimated Quantities.....	Page 3
(5) Certification of Agreement.....	Page 3
(6) Insurance.....	Page 3
(7) Term of Contract and Option to Extend.....	Page 4
Appendix A – Scope of Services and Schedule of Pricing	
(1) Submitting Vendor Information.....	Page 5
(2) Scope of Services	Page 5
(3) Submittal Requirements.....	Page 6
(4) Compliance with HB 89	Page 6
(5) Compliance with SB 252	Page 6
Appendix B – Conflict of Interest Form.....	Page 7
Appendix C -- No Intent to Submit Form	Page 9

CITY OF BURLESON REQUEST FOR QUALIFICATIONS

Date: September 17, 2020

RFQ #: 2020-005

From: Justin Scharnhorst, Purchasing Manager
City of Burleson
817-426-9646
jscharnhorst@burlesontx.com

1. INTRODUCTIONS: City of Burleson requests an immediate Qualification for Vendor(s) for **Oil and Gas Management Services**

QUALIFICATIONS DUE NO LATER THAN DAY, September 17, 2020 @ 3:00 P.M.

2. PAYMENT TERMS: Payment Terms for the City of Burleson are net 30 days after the City's receipt of the Vendor's invoice(s). Vendor should perform all services and provide all products, as determined by the City, prior to issuing the invoice(s). All charges are to be less sales tax as the City is sales tax exempt. Vendor's invoice must include:

- A. Name, address, and telephone number
- B. Name of requesting department
- C. Job site location (if applicable)
- D. Itemized description of services and/or product
- E. City's Purchase Order number
- F. City's RFQ number referenced above

Mail invoices directly to:

Accounts Payable
City of Burleson
141 West Renfro
Burleson, TX 76028

or

via email to accountspayable@burlesontx.com

Payment will be processed after requesting department notifies Finance that **all** services are satisfactorily performed and/or products are received in the expected condition from the Vendor. ***All submitted Qualifications must be accompanied by a signed and completed Form CIQ. Qualifications received without this form may be considered 'non-responsive.'***

NOTE TO VENDOR: ENTER ANY SPECIAL PAYMENT TERMS SUCH AS PARTIAL PAYMENTS, ETC. CALL PURCHASING MANAGER IF YOU ARE UNSURE.

3. NOTICE TO AWARD: Upon review of all Qualifications, Purchasing Manager will call awarded Vendor with a verbal 'NOTICE TO PROCEED.' 'Notice to Proceed' may be followed by a Purchase Order. All terms and conditions contained herein will be applied. Additional terms and conditions may be submitted by Vendor for City approval.

4. ESTIMATED QUANTITIES: The City does not guarantee to purchase any minimum or maximum quantity but does contemplate purchasing exclusively during the term of the contract from the successful vendor.

5. CERTIFICATION OF AGREEMENT: Please indicate below that vendor's Agreement will be subject to and comply with all applicable federal, state, and local laws, ordinances, rules and regulations.

Yes, We agree

No, We do not agree

6. INSURANCE: The Vendor, consistent with its status as an independent contractor, shall carry, and shall require any of its subcontractors to carry, at least the following insurance in such form, with such companies, and in such amounts (unless otherwise specified) as City may require:

6.1. Worker’s Compensation and Employer’s Liability insurance, including All States Endorsement, to the extent required by federal law and complying with the laws of the State of Texas;

6.2. Commercial General Liability insurance, including Blanket Contractual Liability, Broad Form Property Damage, Personal Injury, Completed Operations/Products Liability, Premises Liability, Medical Payments, Interest of Employees as additional insureds, and Broad Form General Liability Endorsements, for at least One Million Dollars (\$1,000,000) Combined Single Limit Bodily Injury and Property Damage on an occurrence basis;

6.3. Comprehensive Automobile Liability insurance covering all owned, non-owned or hired automobiles to be used by the Contractor, with coverage for at least One Million Dollars (\$1,000,000) Combined Single Limit Bodily Injury and Property Damage.

7. TERM OF CONTRACT AND OPTION TO EXTEND: Any contract resulting from this RFQ shall be effective **for three years from date of award.** The City anticipates that contract shall be renewed pursuant to the availability of funds and at the discretion of the City. The City may terminate this contract without cause. The following clauses shall be included in the contract:

7.1. Option Clause: It is agreed that City will have the option to extend the contract for up to two (2) additional years, in one-year intervals. To exercise this option, the City shall serve notice 30 days prior to contract termination or to the end of any one-year extension. The Option to Extend will not be considered if funding is unavailable or if the contractor’s past performance is not within the industry standard.

7.2. Evaluation Criteria:

An evaluation committee will evaluate the responses to this Request for Qualification, may interview one or more firms, and may recommend one or more firms to the City Council. The City reserves the right to reject any or all proposals.

Background and experience of firm.....	40%
<ul style="list-style-type: none">Demonstrate the ability to provide requested services.	
Knowledge of Industry.....	40%
<ul style="list-style-type: none">List Qualifications related to the requested services.	
Over all Planning	20%
<ul style="list-style-type: none">Possess the ability to complete a thorough audit of the City’s assets, current and not performing well sites.Demonstrate process improvements will help the City facilitate existing reporting structures.	

APPENDIX A – SCOPE OF SERVICES

RFQ#2020-005 Oil and Gas Management Services

1. SUBMITTING VENDOR INFORMATION:

Vendor Company Name: _____ Date: _____
Texas Certified Vendor # (CMBL): _____ HUB: Yes No (*circle one*)
Vendor Physical Address: _____
Vendor Mailing Address: _____
Owner Name (please print): _____ TIN: _____
Owner Phone: _____ Owner Email: _____

2. SCOPE OF SERVICES. City of Burleson is seeking to a vendor(s) to provide the following:

- Execute oil and gas division/transfer order instruments. Provide copies to City monthly for review and confirmation of City interests.
- The account is to administered under the provision of a qualified portfolio Project Manager.
- Review, receive and verify oil and gas division/transfer(s) order interests and income received.
- Audit / reconcile all payments between initial date of lease and current date. Reconciliations are to be provided to the City for inspection within 30 days upon request of the City or City Council.
- Process oil and gas revenues by well, property, and producer.
- Establish, as needed, an oil, gas and mineral properties account.
- Establish, as needed, sub-accounts for accounting and distribution purposes if requested by the City of Burleson.
- Receive and process from third parties all payments or funds arising out of Property transactions.
- Transfer income from City assets to the City or the City’s corporate trustee on a schedule to be established by the City.
- Prepare and provide timely monthly statements of all transactions during the preceding month and a monthly inventory of assets, and a quarterly mineral income reports to the City.
- Provide sample reports with this proposal of the monthly transaction report, inventory of assets report and quarterly mineral income reports.
- Provide professional advice regarding cash and/or installment sales, options, assignments, exchanges and partition of mineral interests as requested by the City.
- List in the submittal a single direct professional contact along with a bio of their professional, related experience.
- Prepare regular briefs on any updates related to the Gas Lease Program on Barnett Shale and other gas or oil mineral plays and the effect on leasing City mineral assets upon the City or Council’s request, but at least annually.

- Prepare written progress reports and present to the City if requested. This includes any necessary displays, models, or presentations.
- Other services deemed necessary by the Finance Director, City Manager, or the City Council.
- The City reserves the right to approve the portfolio Project Manager. The City also reserves the right to remove and replace the Portfolio Project Manager with (14) fourteen days written notice to the Consultant.

The Finance Director will provide the key point of contact for day to day project liaison services.

3. SUBMITTAL REQUIREMENTS: Qualifications must be submitted electronically through Bonfire and received by **September 17, 2020** at 3:00 p.m. Please visit <https://burlesontx.bonfirehub.com/login> and register for this free service. Once an account is created, the Qualification can be submitted electronically via Bonfire by selecting the appropriate Qualification Identification and following submittal instructions.

4. Compliance with HB 89: Proposer agrees per HB 89 vendor shall not boycott Israel at any time while providing products or services to the City of Burleson.

Yes, we agree **No, we do not agree** **N/A**

5. Compliance with SB 252: Proposer agrees per SB 252 vendor shall not do business with Iran, Sudan or a foreign terrorist organization while providing products or services to the City of Burleson.

Yes, we agree **No, we do not agree**

Appendix B – Form CIQ

INFORMATION REGARDING VENDOR CONFLICT OF INTEREST QUESTIONNAIRE

WHO: The following persons must file a Conflict of Interest Questionnaire with the City if the person has an employment or business relationship with an officer of the City that results in taxable income exceeding \$2,500 during the preceding twelve – month period, or an officer or a member of the officer’s family has accepted gifts with an aggregate value of more than \$250 during the previous twelve – month period and the person engages in any of the following actions:

1. contracts or seeks to contract for the sale or purchase of property, goods or services with the City, including any of the following:
 - a. written and implied contracts, utility purchases, purchase orders, credit card purchases and any purchase of goods and services by the City;
 - b. contracts for the purchase or sale of real property, personal property including an auction of property;
 - c. tax abatement and economic development agreements;
2. submits a bid to sell goods or services, or responds to a request for proposal for services;
3. enters into negotiations with the City for a contract; or
4. applies for a tax abatement and/or economic development incentive that will result in a contract with the City

EXCLUSIONS: A questionnaire statement need not be filed if the money paid to a local government official was a political contribution, a gift to a member of the officer’s family from a family member; a contract or purchase of less than \$2,500 or a transaction at a price and subject to terms available to the public; a payment for food, lodging, transportation or entertainment; or a transaction subject to rate or fee regulation by a governmental entity or agency.

WHAT: A person or business that contracts with the City or who seeks to contract with the City must file a “Conflict of Interest Questionnaire” (FORM CIQ) which is available online at www.ethics.state.tx.us and a copy of which is attached to this guideline. The form contains mandatory disclosures regarding “employment or business relationships” with a municipal officer. Officials may be asked to clarify or interpret various portions of the questionnaire.

WHEN: The person or business must file:

1. the questionnaire – no later than seven days after the date the person or business begins contract discussions or negotiations with the municipality, or submits an application, responds to a request for proposals or bids, correspondence, or other writing related to a potential contract or agreement with the City; and
2. an updated questionnaire – within seven days after the date of an event that would make a filed questionnaire incomplete or inaccurate.

It does not matter if the submittal of a bid or proposal results in a contract. The statute requires a vendor to file a FORM CIQ at the time a proposal is submitted or negotiations commence.

ENFORCEMENT: Failure to file a questionnaire is a Class C misdemeanor punishable by a fine not to exceed \$500. It is an exception to prosecution that the person files a FORM CIQ not later than seven business days after the person received notice of a violation.

NOTE: The City does not have a duty to ensure that a person files a Conflict of Interest Questionnaire.

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor or other person doing business with local governmental entity

FORM CIQ

This questionnaire reflects changes made to the law by H.B. 1491, 80th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code by a person who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the person meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code.

A person commits an offense if the person knowingly violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of person who has a business relationship with local governmental entity.

2 Check this box if you are filing an update to a previously filed questionnaire.

(The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date the originally filed questionnaire becomes incomplete or inaccurate.)

3 Name of local government officer with whom filer has employment or business relationship.

_____ Name of Officer

This section (item 3 including subparts A, B, C & D) must be completed for each officer with whom the filer has an employment or other business relationship as defined by Section 176.001(1-a), Local Government Code. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer named in this section receiving or likely to receive taxable income, other than investment income, from the filer of the questionnaire?

Yes No

B. Is the filer of the questionnaire receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer named in this section AND the taxable income is not received from the local governmental entity?

Yes No

C. Is the filer of this questionnaire employed by a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership of 10 percent or more?

Yes No

D. Describe each employment or business relationship with the local government officer named in this section.

4

_____ Signature of person doing business with the governmental entity

_____ Date

Appendix C: No Intent to Submit Form

If your firm has chosen not to submit a Qualification for this procurement, please complete this form and submit to:

City of Burleson
Purchasing Manager
141 West Renfro
Burleson, Texas 76028
Phone / Fax: 817-426-9646
Via email to jschamhorst@burlesontx.com

Please check all items that apply:

- | | |
|---|---|
| <input type="checkbox"/> Do not sell the item(s) required | <input type="checkbox"/> Cannot provide Insurance required |
| <input type="checkbox"/> Cannot be competitive | <input type="checkbox"/> Cannot provide Bonding required |
| <input type="checkbox"/> Cannot meet specifications highlighted in the attached request | <input type="checkbox"/> Cannot comply with Indemnification requirement |
| <input type="checkbox"/> Job too large | <input type="checkbox"/> Job too small |
| <input type="checkbox"/> Do not wish to do business with the City of Burleson | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Cannot submit electronically | |

Company Name: _____

Authorized Officer Name (Please print): _____

Telephone: (____) _____ Fax: (____) _____

I learned of this Request for Qualification by the following means:

- | | |
|---|---|
| <input type="checkbox"/> City Advertisement | <input type="checkbox"/> City E-mail Notification |
| <input type="checkbox"/> Website | <input type="checkbox"/> Cold Call to City |
| <input type="checkbox"/> Mailed Me a Copy | <input type="checkbox"/> Other |
| <input type="checkbox"/> Bonfire | |