

Responding to RFPs 101

*How to Submit Strong, Compelling RFP Responses for
City of Tulsa Opportunities*

Updated February 2022



Creating a Great Customer Experience

Making our procurement process as accessible and friendly as possible is a priority for the City of Tulsa. We want your bidding experience to be clear, efficient, and welcoming, no matter what service or product your firm provides.



We especially welcome businesses that are new to contracting with the City – we're so glad you're here!



Responding to RFPs 101 will cover...

- **WHAT:** an overview of the Request for Proposal (RFP) form's structure, content, and purpose. This does **not** focus on the Invitation for Bid (IFB).
- **HOW:** guidelines for submitting RFP responses to the City Clerk's office correctly.
- **HOW:** 5 tips for writing strong and compelling RFP responses that best highlight your firm's strengths.

GOAL: To learn how to respond to RFPs accurately and effectively, such that you present RFP responses that best highlight your firm's strengths.



Housekeeping

- Have a question? Put it in the chat! We'll save **the last 15~ minutes to address your questions and comments**. I'll also address questions in the chat over breaks during the “quiz” sections of the training.
- Stay muted unless speaking.
- This session will be recorded for future reference and posted on Tulsa's [“Selling to the City” website](#).



What is an RFP?

City of Tulsa Finance Department

Request for Proposal

Professional Services for:
Language Access – Translation, Interpretation, and Cultural Competency Training

Request for Proposal

RFP TAC1051A

Professional Services for:
Hauling and Disposal of Household Pollutants

NIGP Commodity Code(s):
968-71 Solid or Liquid Waste Disposal

- **A problem to solve**: An RFP is the document the City uses to promote an opportunity for a vendor to help the City address a particular need or achieve a certain goal. The RFP will describe what they expect from a vendor and how their performance will be measured.
- **A job description**: The RFP will also lay out how candidates' responses will be evaluated based on a set of criteria. Unlike IFBs, RFPs are primarily evaluated on **qualitative factors**.
- **An opportunity for innovation**: Upon reading the RFP, you can reach out to your buyer with questions and comments regarding the specifications and what product or service best suits the City's needs.



**But what does an RFP typically look like?
What's the purpose of each section?**



Cover Page

City of Tulsa

Finance Department

Request for Proposal

22-917

Professional Services for:
Nuisance Wildlife Control Operators

Right away you know:

- What the City wants
- NIGP commodity codes (which are key to vendor registration!)

The rest of the page tells you:

- Key dates: pre-proposal conference, question deadline, proposal submission
- Assigned buyer

RFP Schedule

EVENT	DATE
RFP Issue Date	2/16/2022
Pre-Proposal Conference	2/27/2022 at 9:00 AM CT
Deadline for Questions <i>Submit to assigned buyer via email.</i>	3/04/2022 <i>10 Days prior to RFP due date</i>
Proposal Due Date <i>Mail or deliver to City Clerk address. Proposals are open the day after the due date.</i>	3/16/2022

If You have any questions or need additional information, contact the Assigned Buyer:

Donny Tiemann | dtiemann@cityoftulsa.org

All questions should be emailed with the RFP number in the subject line.



Sections I-III: Overview and Background

These sections tell you:

I. STATEMENT OF PURPOSE:

The City of Tulsa's Municipal Employees' Retirement Plan ("MERP" or "Plan") is administered by a seven (7) member Board of Trustees. The Plan is governed by Title 28, Tulsa Revised Ordinances. The duties of the Board include, but are not limited to, establishing by-laws, formulating policy and implementing procedures to accomplish the objectives of the Plan, establishing general investment policies and guidelines, reviewing, approving and authorizing all payments and expenditures from the Fund, and exercising discretionary authority in construing the terms of the Plan.

With this Request for Proposal (RFP), the MERP Board of Trustees is seeking to secure professional services to provide actuarial and consulting services.

We enthusiastically look forward to receiving your proposal.

- What problem the City is trying to solve
- Why the City needs this service to solve the problem
- What context and consideration a vendor needs to know when addressing this problem



Sections IV-V: Scope of Work and Deliverables

These sections tell you:

- What activities, reports, and/or products the City expects to be completed during this contract
- What requirements the City expects the vendor to meet
- Why those activities and requirements are crucial to the RFP's goals and outcomes

SCOPE OF WORK

1. Humanely capture, relocate or euthanize coyotes within Tulsa city limits using the most update, sophisticated wildlife removal techniques; identify;
2. Work in collaboration with the City and Tulsa Animal Welfare (TAW) to identify targeted neighborhood areas, conduct investigations or evaluate a nuisance coyote complaints and/damage prior to taking removal actions;
3. Assist staff in the development of a proposed method of control and prevention measures to eliminate or minimized future human/coyote (wildlife) conflicts, including educational materials.

IV. SCOPE OF WORK:

- A. The Respondent shall perform work in a manner that both incorporates and aligns with the values of a Resilient City as exemplified in our Existing Plans and Studies In-Progress.
- B. The Respondent shall develop objectives through these lenses—reflective, resourceful, inclusive, integrated, robust, redundant, and flexible
- C. The Respondent shall identify, research and analyze uses for the identified property. This is **not** a request for planning services.
- D. The Respondent shall work with the City to develop and administer a Request for Proposal (RFP) selection process for the future development of the site, in accordance with findings from the feasibility study.
- E. The Respondent's proposal shall observe, foster and support racial equity and economic justice.
- F. Respondents shall articulate the ways in which their process is inclusive of and honor the legacy of the Greenwood neighborhood: a nationally known center of business for African-Americans and the heart of Tulsa's African-American community.



Section VI: Performance Metrics and Contract Management

This section tells you:

- How the City will be tracking vendor performance and progress towards outcomes
- Who will collect those metrics and how often
- How the City will engage with the vendor during the contract

VI. PERFORMANCE METRICS AND CONTRACT MANAGEMENT

Performance Metrics

The following performance metrics highlight key priorities that will be analyzed with the awarded vendor collaboratively during the life of the contract. This is not an exhaustive list, but rather an indication of significant performance metrics of interest to City of Tulsa. The City looks forward to working with awarded vendors to define additional important performance metrics during contract negotiations. The final set of performance metrics and frequency of collection will be negotiated by the successful proposer and the City prior to the finalization of an agreement between parties and may be adjusted over time as needed.

Performance Metric	Data Source	Data Collection Frequency	Data Collection Responsibility
% of Tulsa lockbox payments successfully converted to electronic payment (i.e. reduction of hard copy checks)	Vendor internal data	Quarterly	Vendor
% of Tulsa residents who find paying for Utility bills a simple, straightforward process	Survey	Quarterly	City of Tulsa

An RFP is NOT the contract – the final performance metrics will ultimately be determined by the chosen vendor and the City collectively.



Section VIII: Response Form Questions

VIII. RESPONSE QUESTIONS AND PROPOSAL REQUIREMENTS

COVID-19 Relief Grants for Community Assistance and Recovery Initiatives

Project Title [Click or tap here to enter text.](#)

PROJECT ABSTRACT – (Please limit answers to one paragraph each):

1. Share a brief description of the proposed project, including project activities to be undertaken and resources used.

[Click or tap here to enter text.](#)

2. Provide a high-level overall timetable of the proposed project. Project must be initiated after grant agreement execution and conclude no later than March 31, 2022.

[Click or tap here to enter text.](#)

3. Provide a high-level budget summary. Please make clear what COVID-19 Relief funds will be used for.

[Click or tap here to enter text.](#)

4. Is the proposed project an extension or expansion of an existing offering or service? If so, please briefly summarize your existing offering. If not, please describe your experience with similar projects.

This section describes:

- What written content or responses you need to provide in order to demonstrate your qualifications
- What the City will use to determine your “score” on various evaluation criteria to determine the strongest RFP response

Our goal is to keep things **simple and accessible**: all respondents answer the same questions in the same manner to share their qualifications and strengths.



Section IX: Evaluation Criteria

This section discusses:

- **How responses are evaluated:** The RFP will list various categories, each with a point value, and a basic description of what a top score looks like. Typically points add up to 100.
- Again, RFPs are primarily evaluated on **qualitative factors**, not just price. These can include:
 - Qualifications and experience
 - Service delivery
 - Staff capacity and training
 - Familiarity with project context or recipients
 - Past performance

IX. EVALUATION OF PROPOSALS:

The approval of the selected Respondent will be subject to the final determination of the City and will be contingent on the successful completion of a contract between the City and the selected Respondent(s).

In this RFP, a panel consisting of not less than three City of Tulsa employees will evaluate proposals, others with be included as deemed necessary to provide expertise in the review of proposals. 2-3 finalist RFP responses may be selected for further group interviews for final evaluation. Final selection shall be the sole determination of the City, and if a selection is made it will be to the Respondent whose proposal is determined to be in the best interests of the City.

All bids will be evaluated using the following criteria:

Category	Total Points	What Would a Top Score Look Like?
Qualifications and Experience	20	Exceptional proposers will have the qualifications and experience to provide one or more service described in the work scope for at least tier one languages (Spanish, Burmese, Zopau (Zomi), Vietnamese) on an as-needed basis to the City's 19 departments
Staff Capacity and Training	25	Exceptional proposers will have high-quality interpreters who adhere to established language services and confidentiality standards and best practices.
Service Delivery and Oversight	40	Exceptional proposers will provide high quality and timely services.
Pricing and Cost Proposal	15	Exceptional bidders will provide a comprehensive schedule of all fees proposed (including fees associated with after-hours, last-minute or nontraditional requests)



Quiz Time!

Which of these statements is TRUE?

- A. There is NO part of the RFP explicitly dedicated to the RFP's goals and the context surrounding them.**
- B. RFPs are primarily evaluated on qualitative factors, such as past performance and staff capacity.**
- C. Performance metrics are the methods the City will use to evaluate RFP responses.**
- D. You can choose to “opt out” of certain evaluation criteria. RFP responses are each evaluated on a different set of criteria.**

**So how do I respond to an RFP
correctly? How and what do I need to
submit?**



What should ALWAYS be in my RFP response?

Use the included bidder checklist as your guide.
EVERY RFP response requires:

- Cover letter
- Respondent information sheet
- Proposal response form/written proposal narrative
- Price summary sheet
- Affidavit (**notarized and signed!**)
- Any additional information (recommendations, materials) required by the RFP.

RESPONDENT CHECKLIST

Use this checklist to ensure You have properly read and completed all documents listed below. This document (the RFP) contains all the following materials, which must be completed and returned to the City of Tulsa Clerk's Office. We recommend You include this checklist with your proposal.

Proposer's Name: _____

RESPONDENT CHECKLIST	
RESPONDENT DOCUMENTS	INCLUDED?
Cover Letter	
Respondent Information Sheet	
Proposal Response Form	
Price Summary Sheet	
Affidavit (Non-Collusion and Interest) (required form)	
Additional Information (Optional)	
Reference sheet (include information for 2 references)	

Supplementary materials vary greatly between RFPs. Make sure to read the checklist included in *your* RFP.



How should I submit my RFP response?

*You **MUST** mail or submit your hard copy RFP response to the following address:*



**Office of the City Clerk – City of Tulsa
175 E. 2ND St., Suite 260
Tulsa, OK 74103**

RFP responses must be received no later than **5:00pm CST on the bid submission date** listed on the first page of the RFP.

- Occasionally the City will also ask that you also send a thumb drive (2 or more) and/or email a digital copy to a specific email address.



How should I submit my RFP response?

Use the included RFP packet label to ensure the address is correct and that you have the right information.

Make sure this is your firm's **legal name**.

FROM: Ralph Respondent
Okie Financial Audit Services (OFAS)
123 Cincinnati Avenue
Tulsa, OK 74104

City of Tulsa - City Clerk's Office
175 East 2nd Street, Suite 260
Tulsa, OK, 7410

Remember to write the RFP number and description on your label.

Respondent Submission For:
RFP# 22-786
RFP DESCRIPTION: Financial Auditing



Quiz Time!

Which of the following is FALSE?

- A. Your packing label should include the RFP #.**
- B. When mailing your RFP response, the packet should be directed to the City Clerk's office, NOT the programmatic department overseeing the RFP.**
- C. You can fax or email your RFP response to the City Clerk's office.**
- D. The affidavit needs to be notarized and signed by an authorized agent.**

5 Most Common Errors Firms Make in RFP Responses



1. Not Including the Right Documents

Make sure to read the respondent checklist carefully: include in your RFP response ALL the materials requested. No more, no less. If all the required documents are not included, you will be considered **non-responsive**.

RESPONDENT CHECKLIST

Use this checklist to ensure You have properly read and completed all documents listed below. This document (the RFP) contains all the following materials, which must be completed and returned to the City of Tulsa Clerk's Office. We recommend You include this checklist with your proposal.

Proposer's Name: _____

RESPONDENT CHECKLIST	
RESPONDENT DOCUMENTS	INCLUDED?
Cover Letter	
Respondent Information Sheet	
Proposal Response Form	
Price Summary Sheet	
Affidavit (Non-Collusion and Interest) (required form)	
Additional Information (Optional)	
Reference sheet (include information for 2 references)	

You also don't get any extra points for attaching material that was not asked for! Only include materials listed on this checklist!



2. Not Customizing Your Response to the City of Tulsa's Needs

Purchasing staff can see a “copy-paste” job from a mile away. Don't recycle, customize! Make sure that your RFP response genuinely responds to the questions asked and demonstrates how your firm can meet *Tulsa's* needs, not any client's. Check that you've addressed all evaluation criteria.



3. Sharing Overly Lengthy Responses to See “What Sticks”

Longer responses do not mean better responses! We like brevity. Focus on the questions being asked. If 150 words answer the question, then a 1000-word responses only make it harder for City of Tulsa to read and review your proposal in a timely manner.



4. Not Featuring Specific Examples in Your Response

One of the best ways to demonstrate your value-add as a vendor is to share specific examples of how your services address our needs.



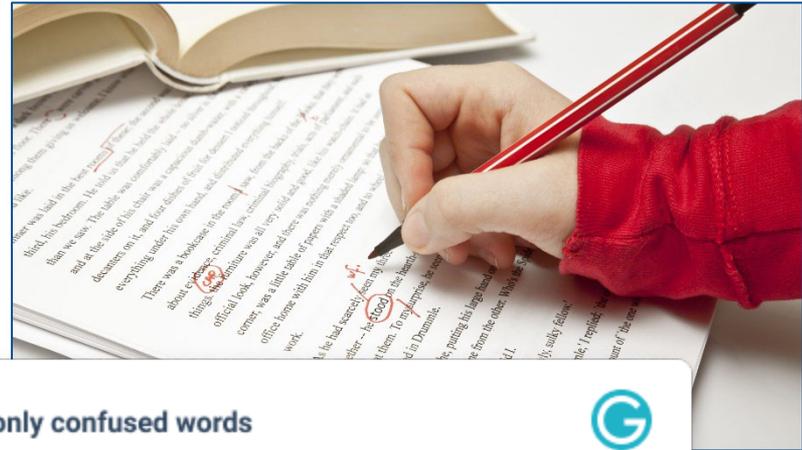
Don't rely on generic descriptions and vague promises! Answer the RFP response questions using examples of past projects or descriptions of approaches unique to your firm.

5. Forgetting to Review Before Submission

You'd be surprised to see how many error-filled RFPs the City of Tulsa receives. Make sure to:

- Do a proper spell check.
- Review formatting and grammar.
- Remove Track Changes and Google Doc comments.

Ask colleagues to review your RFP response and confirm that you included all the necessary materials AND demonstrate that you meet the specifications.



Commonly confused words

I wasnt sure what to except.

I **wasn't** sure what to **expect**.

Quiz Time!

What are key things to review before submitting your RFP?

- A. Whether your responses answer the questions asked in the RFP and address Tulsa's needs**
- B. Spelling and grammar**
- C. Whether or not you included the right attachments**
- D. You should review all these components before submitting!**

How can I hear about upcoming RFPs?

City of Tulsa Vendor Registration Form

Vendor Information

Instructions: Complete the section below to provide basic information about your business or firm. Complete the sections below to provide basic information about your business or firm in order to conduct business with the City of Tulsa. If you have any questions, you can reach Jina Djahedian at jdjahedian@cityoftulsa.org

Company Name*
As shown on tax returns and organizational documents

Doing Business As (if applicable)

Register online!

- [Complete online registration](#) – including W9 and EFT forms.
- You'll then receive email notifications about bid opportunities based on what **commodity codes** your firm selects.
- Having trouble with bid registration? Email Jina Djahedian at jdjahedian@cityoftulsa.org

<https://www.cityoftulsa.org/government/departments/finance/selling-to-the-city/register-as-a-vendor/>



Questions? Comments?

Feel free to email Steve Johnson (smjohnson@cityoftulsa.org), Shelley Crayton (scrayton@cityoftulsa.org), or purchasing@cityoftulsa.org.

Thanks!

