

CONTRACTING 101: HOW TO RESPOND TO A REQUEST FOR PROPOSAL (RFP)

DPS Workshop Series | Hosted by: Jackie Umbles

The Department of Procurement Services is committed to Communications and Outreach, which is key to keeping citizens informed of bid opportunities, new programs, and innovations.

Also, ensure that you download a copy of our most recent **Consolidated Buying Plan**. This is a 15-month forecast including hundreds of upcoming opportunities for 12 city agencies. To download, go to: **www.chicago.gov/dps**.

We encourage you to follow us on our website **www.chicago.gov/dps** for the latest news, updates, and our calendar of events. Go online, www.chicago.gov/DPS and click on the letter icon and sign-up for our **Email Newsletter: DPS Alerts** full of news that you can use.

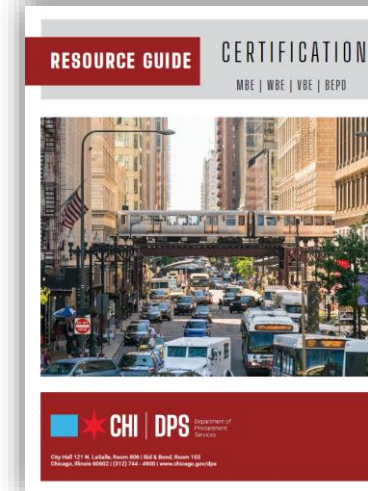
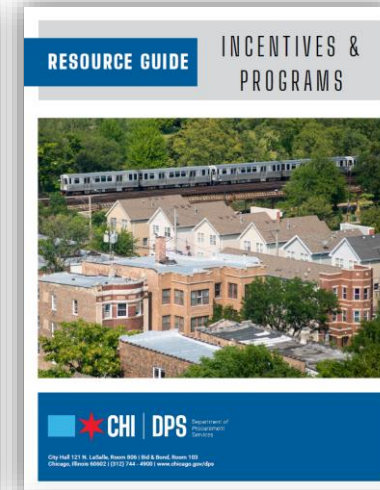
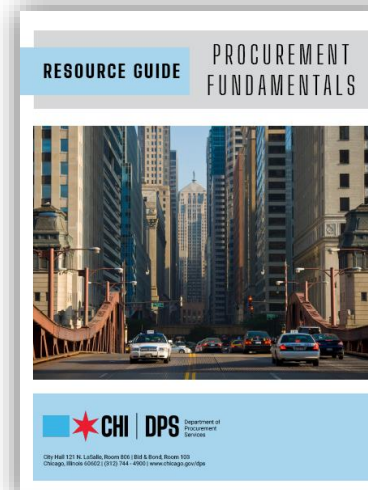
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- NOTE: Legal advertisements for the City of Chicago Department of Procurement Services (DPS) appear in the Chicago Tribune. Information about DPS contracting opportunities will be available at www.chicago.gov/bids.

Welcome

RESOURCE GUIDES

- DPS has published a four-volume set of Resource Guides, expanding on the guiding principle of transparency.
- The Resource Guides were divided into key areas of the procurement process:
 - Contract Administration
 - Incentives and Programs
 - Certification
 - Compliance
- Download now at www.chicago.gov/dpsguides



Today's Workshop

- Everyone is muted upon entry for the presentation portion of the workshop
- We ask that you hold your questions to the end of the presentation. You can use the chat feature to type out your question and the speaker will answer the questions at the end of the presentation.
- To Send a Question: **Use only the Q & A panel to ask your question. Do not use the chat panel**
 - Use the **Q & A panel** on the right side of your screen.
 - In the Send to or To drop-down list, select the recipient of the message.
 - Enter your message in the chat text box, then press Enter on your keyboard.

Note: If you join a meeting, session, or event in progress, you can see only the Q & A that participants send after you join.

CONTRACTING 101: HOW TO RESPOND TO A REQUEST FOR PROPOSAL (RFP)

Today's Workshop | Presented by: Bernie Harges

- Department Overview
- Tips for Finding Opportunities
- RFP vs Competitive Bid?
- RFP Proposal Format
- RFP Proposal Content
- RFP Evaluation Criteria
- Tips for Preparing RFP Proposal
- eProcurement Submission
- Proposal Evaluation and Award

OUR GOALS AT A GLANCE

DEPARTMENT OVERVIEW

DPS is the contracting authority for the procurement of goods and services for the City of Chicago. We work together as a team and with our customers to guarantee an open, fair, and timely process by establishing, communicating and enforcing superior business practices.

Tips for Finding Bid Opportunities

- Bids valued over \$100,000.00 and RFP's are publicly advertised in Chicago Tribune.
- Bids and RFPs are posted weekly to view and download on the CoC Department of Procurement Services (DPS) website:
 - www.chicago.gov/bids and www.chicago.gov/city/en/depts/dps/isupplier/current-bids.html
- Bid opportunities are posted in CoC DPS Bid & Bond Room 103, City Hall, 121 N. LaSalle St.
- See CoC Buying Plan and register your company for DPS Alerts on the DPS website at www.chicago.gov/Procurement.
- Attend Pre-Bid Conferences. Network with other potential bidders to partner on the bid, subcontract or submit as prime.
- Check Bid Take Out List posted on DPS website.

RFP vs Competitive Bid

REQUEST FOR PROPOSAL (“RFP”)

- Method of procurement to hire a professional services consultant to implement a new project in various professional service disciplines.
- Project specific.
- Used when the City does not have in-house technical experts or resources to implement a project or provide services.



COMPETITIVE BID (“BID”)

- Method of procurement to purchase supplies, equipment, maintenance, and/or repair services and construction.
- Detailed bid specification prepared.
- Structured as project-specific with specific quantities (One Time) or “blanket” indefinite quantity usage (aka Depends Upon Requirements (DUR) Term Agreement) for goods and/or services.
- Proposal Page line items include the defined unit of measures and specific or estimated quantities.

**Use of RFP
vs.
Competitive
Bid?**

RFP vs Competitive Bid?

- Bid specification details every aspect of product or services. An RFP defines project objectives and scope of service parameters but does not specify in detail every aspect of how to accomplish or perform the required services. The City seeks proposals from qualified vendors detailing their proposed plan to implement and complete the project.
- An RFP entails a detailed evaluation of proposals by an Evaluation Committee (“EC”) based on the evaluation criterion published in the RFP. The EC is comprised of various stakeholder departments.
- For a competitive bid, the contract award is to the “lowest responsive and responsible bidder,” meeting City specifications based on department review of Bid Tabulation & recommendation of award.
- For an RFP, vendor selection is to the highest-rated or ranked Respondent to the RFP, not the lowest price. Price can be negotiated.

- RFP content is standardized but may vary depending upon the project, for example, City-funded or State/Federal Grant funding.

MBE/WBE vs. DBE Goals

- Minority Business Enterprise (MBE) and Women Business Enterprise (WBE) participation goals typically are in all City-funded projects.
- Disadvantaged Business Enterprise (DBE) participation goals may be required for State or Federal grant-funded projects.
- If DBE goals, Local Preference terms (e.g., Chicago Based Business Preference, MBE/WBE, etc.) will be removed if prohibited by the grantor.

RFQ Additional Information

RFP Proposal Format

eProcurement Electronic Proposals

- Proposals must be word-searchable
- Sections of the proposal should be organized in subject matter sequence in the Required Content of Proposal section of the RFP. Each page should be numbered in a manner to be uniquely identified.
- Proposals must be clear, concise, and well organized.
- A redacted Proposal must be submitted.

Proposal Content

- Cover Letter
- Executive Summary
- Professional Qualifications and Specialized Experience of Respondent and Team Members
- Professional Qualifications and Specialized Experience of Key Personnel
- Implementation or Work Plan
- Cost Proposal (Submit on City form for equitable comparisons)
- MBE/WBE or DBE Plan (Schedules C-1 and D-1)
- Financial Statements (Audited last 3 years or equivalent)
- Online Economic Disclosure Statement Certificate of Filing and Affidavit (“EDS”)
- Legal Actions (Last 5 years)
- Insurance (Required at time of contract award)

RFP Proposal Content

RFP Evaluation Criteria

RFP evaluation criterion will vary depending upon the project, but the most common ones are as follows:

- Professional Qualifications & Specialized Experience, Local Availability of Team (Prime, joint venture partners or subcontractors, if any).
 - Current and Past Performance Record + References
 - Certifications and/or Licenses
- Professional Qualifications & Specialized Experience, Local Availability of Key Personnel.
 - Resumes/Role on Project + Organization Chart/Dedicated Resources
- Implementation or Work Plan
- Cost Proposal
- MBE/WBE Commitment (25% MBE and 5% WBE Participation Goals or Other Goals Set) DBE may apply if federally funded project.
- Financial Statements
- Compliance with Laws, Ordinances, and Statutes. EDS Certifications.
- Legal Actions
- Conflict of Interest

Tips for Preparing RFP Proposals

- Exhibit forms that must be completed as part of the proposal submission will vary depending upon the RFP, but the following exhibit forms are universal to every RFP:
 1. Company Profile Information
 2. Company References/Client Profile Information
 3. MBE/WBE or DBE Compliance Plan (Schedule C-1 and D-1) and/or Waiver?
 4. Online Economic Disclosure Statement and Affidavit (“EDS”), which includes Disclosure of Retained Parties and Familial Relationships with Elected City Officials and Department Heads and Other Certifications. For online EDS instructions, go to: <http://webapps.Chicago.gov/EDSWeb>.
 5. Insurance Certificate (Required at Contract Award)
- Review City Standard Contract Terms and Conditions if attached as an RFP exhibit to determine if your firm can perform under those terms & conditions.
- Verify the existence of any Addendum issued by the City before submitting a proposal.

Tips for Preparing RFP Proposal

Tips for Submitting RFP Proposal

eProcurement Submissions



- The City has transitioned from paper proposal submissions to online submissions of RFPs and RFQs via eProcurement. Vendors must register in iSupplier to submit electronic submissions through eProcurement. Proposals cannot be submitted via eProcurement after the published due date.
 - "iSupplier" refers to the City's eProcurement computer system for electronic bidding and providing Contractors with access to contract, ordering, and payment information for their City contracts.
 - Allow three business days to complete registration.
- Pay attention to the RFP instructions for proposal submission requirements.
- Cover letter must be signed by an authorized officer and acknowledge any Addendum issued.
- Make a checklist of all submittal requirements per the Proposal Required Content section to verify completeness of proposal before submitting to DPS.

- The eProcurement RFP document can be viewed and downloaded using the following link: <https://www.chicago.gov/city/en/depts/dps/isupplier/current-bids.html>
- Register in iSupplier: <https://www.chicago.gov/city/en/depts/dps/isupplier/login-register.html>
- Addendum: <http://www.chicago.gov/eprocurement>
- Pre-Proposal Conference Attendees:
https://www.chicago.gov/city/en/depts/dps/supp_info/2017PreBidandPreSubmittalConferenceAttendees.html
- Takeout list: www.chicago.gov/TOL
- eProcurement Workshop Schedule:
<https://www.chicago.gov/city/en/depts/dps/provdrs/eprocurement.html>
- eProcurement Instructional Documents:
<https://www.chicago.gov/city/en/depts/dps/isupplier/online-training-materials.html>

eProcurement Submission Resources

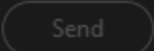
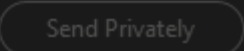
Proposal Evaluation and Award

- Respondents to the RFP are posted on the website. No other information about proposals or evaluation is available until after completion of the contract award. 20
- All Freedom of Information Act (FOIA) requests received are held until after contract award. Debriefing meetings can be requested in writing to CPO.
- Evaluation Committee (“EC”) evaluates proposals in 3 Phases:
 1. Preliminary Proposal Assessment (Checklist for “Responsiveness?”)
 2. Proposal Evaluation
 3. Site Visits, Demonstrations, Oral Presentations, if necessary
- Vendor selection and declination letters sent to Respondents, as applicable. The city is not obligated to select any vendor.
- Contract award contingent on the successful negotiation of terms and pricing. City not obligated to award a contract. RFP may allow multiple awards by Service Category or separate Projects.

▼ Q & A  

All (0)

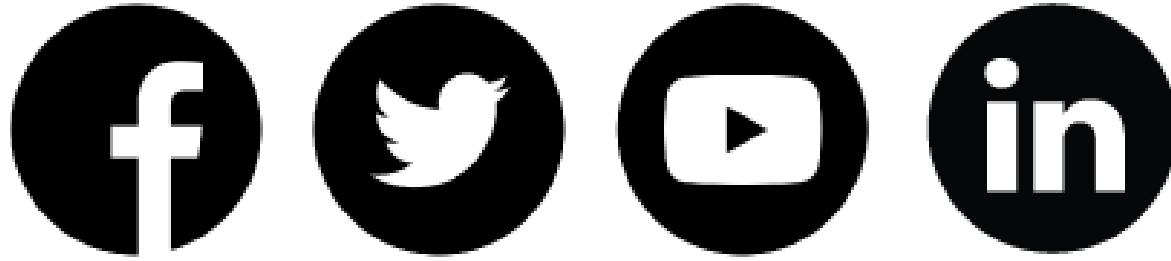
Select a question and then type your answer here.
There's a 512-character limit.



QUESTIONS?

Do you have a question? Please use the WebEx Q&A feature as shown.



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