



City of Houston RFP Technical Writing Workshop

EDUCATE. CONNECT. GROW.

Presented by the Office of Business Opportunity

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Welcoming Remarks



- Sign in
- Introductions
- Road map to success
- Questions





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Doing Business with the City



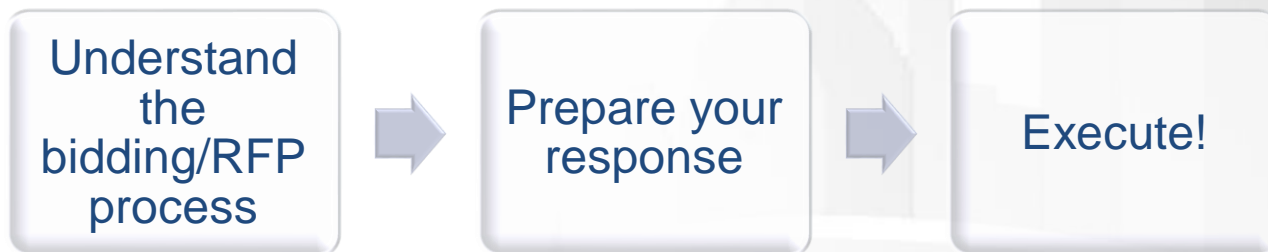
Doing Business with the City



The City of Houston awards over one billion dollars in construction, professional services, goods & services, purchase orders, and other various procurements each year.

Many businesses want to work on City contracts.

The best preparation for winning government contracts is



Doing Business with the City



Step 1: Create an online web account

- If you have never done business with the City of Houston before, create an online account by going to www.purchasing.houstontx.gov

Strategic Procurement x
purchasing.houstontx.gov

CITY OF HOUSTON STRATEGIC PROCUREMENT DIVISION

Please make a selection from the menu below

Guide to Doing Business with the City & FAQs	New Users Creat New Acct. User Name / PW	Existing User Register, Log In, or Search
Supplier Resources and Procurement	All About Formal Bids and RFPs	Search Bids, RFPs, Tabs, Pre-Bid Schedules
Forms Business, Pay or Play, Hiring, Etc.	Office of Business Opportunity	Strategic Procurement Buyer Groups
Purchasing Terms and Conditions	City of Houston Procurement Manual	State of Texas Bid Law



Doing Business with the City



Step 1: Fill out the form

← → C purchasing.houstontx.gov/Bid_RegForm.aspx

City of Houston Strategic Procurement

The complete online resource dedicated to doing business with the City of Houston.

Strategic Procurement Departmental Links

- Existing Suppliers Login
- Projected Procurement Opportunities
- NIGP Code Search and Commodity Provider Search
- Overview of Bid/RFP Processes
- Records Management
- The Chief Procurement Officer
- The City Purchasing Agent
- Employee Directory
- Citywide DPU (Departmental Purchasing Unit) Contact List
- Site Search
- Site Map

Finance Department
Strategic Procurement Division
City Hall Building
901 Bagby St., Concourse Level
Houston, TX 77002

Contact the City of Houston

- Jump to a different section -

Welcome New Users:
Use this section to Create Your Online Account

New Users
Create New Account
Username & Password

Please create your online web account here before you can access the Supplier Registration form to register as a City of Houston Supplier and receive a Supplier Number.

If you are not sure whether your company is register, [Click Here](#) to search for an existing supplier profile.

Please follow the instructions below, create and complete the online web account. This requires an email address, password and a physical address per one web account. **We highly recommend you use a general company email address, so the web account can be shared among your employees.** Proceed to the Supplier Registration form and complete to receive the supplier number. For additional information, please review [Supplier Registration Online Guide](#). For assistance, or if you need to register for a PO Box or Out of the Country address, submit your request to houstonpurchasing@houstontx.gov, or contact the Supplier Registration office at 832-393-8800 office M-F, 7:00am to 4:00pm.

Physical addresses only.

First Name:

Last Name:

Company: (35 Chars.)

Company Cont: (35 Chars.)

DBA: (35 Chars.)

DBA Cont: (35 Chars.)

Address:

City:

State:

Zip Code:

Telephone:

Requires an email address and physical address per web account

Doing Business with the City



Step 2: Once the web account is created, click on Existing User to fill the Supplier Registration form and receive the supplier number

Strategic Procurement x
← → ↻ purchasing.houstontx.gov

CITY OF HOUSTON STRATEGIC PROCUREMENT DIVISION

Please make a selection from the menu below

- Guide to Doing Business with the City & FAQs**
- New Users**
Creat New Acct.
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Register, Log In,
or Search
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- Forms**
Business, Pay or Play, Hiring, Etc.
- Office of Business Opportunity**
- Strategic Procurement Buyer Groups**
- Purchasing Terms and Conditions**
- City of Houston Procurement Manual**
- State of Texas Bid Law**

Click on Existing Users



Doing Business with the City



Step 2: Use the same Email address and password

The screenshot shows a web browser window with the URL `purchasing.houstontx.gov/Vendor_Logon.aspx?ReturnUrl=/vendor/Vendor_VendorInfo.aspx`. The page title is "City of Houston Strategic Procurement" and the subtitle is "The complete online resource dedicated to doing business with the City of Houston." The page features a navigation menu with links for Home, I Want To..., Government, Residents, Business, Departments, Visitors, and En Espanol. A sidebar on the left lists "Strategic Procurement Departmental Links" including Existing Suppliers Login, Projected Procurement Opportunities, NIGP Code Search and Commodity Provider Search, Overview of Bid/RFP Processes, Records Management, The Chief Procurement Officer, The City Purchasing Agent, Employee Directory, Citywide DPU (Departmental Purchasing Unit) Contact List, Site Search, and Site Map. The main content area has a dropdown menu for "Jump to a different section" and a section for "Existing Supplier Login" with input fields for Email Address, Password, and a Remember Email checkbox, followed by a Login button. A warning message states: "WARNING: It was recently reported that a fraudulent purchase order (PO) representing City of Houston was sent to some of our vendors. We would like to raise your awareness on this issue and ask you to please be alerted if you receive a PO from City of Houston which seems abnormal. Read here for more information." Below the warning is a section "Having trouble logging in?" with links for NOT SURE if you are registered?, NEW USER?, and FORGOT PASSWORD?. At the bottom, there is a paragraph explaining that online bids and RFPs require suppliers to be registered online and provide a signed IRS W9/-W-8 to become a supplier with the City of Houston.



Doing Business with the City



Fill in the information

Website By Website... SEARCH By Zip Code... SEARCH

The City of Houston
Official Site for Houston, Texas

Home | I Want To... | Government | Residents | Business | Departments | Visitors | En Espanol

Supplier Registration > Registration Form Share

City of Houston Strategic Procurement

The complete online resource dedicated to doing business with the City of Houston.

You are Logged In. Manage Your Supplier Account:

- Search Bids & RFBs
- Submit/Manage Bids
- Update Supplier Profile
- Update Web Account
- Reset Password

Supplier Home

Bid Search

Web Account Profile

Supplier Registration Profile

Logout

Finance Department
Strategic Procurement
City Hall Building
901 Bagby Street
Concourse Level
Houston, TX 77002

Contact the City of Houston

- Jump to a different section -

Supplier Registration Form

Please STOP and do not fill this form if you have a supplier number and only need a new web account!

Important! You must complete the Vendor Registration form online and click submit in order to obtain a valid Supplier Number and become eligible to participate in bids and conduct business with the City. For assistance, please contact us at (832) 393-8800, M-F 7:00 am to 4:00pm.

Bold Denotes Required Fields

Business Name

Your Company name must match the Company name on your IRS W-9/W-8 form. DBA is not required; however, if you have a business name that is different from your Company name, enter it in the DBA box below.

*
Company Name:
(35 character maximum)

Company Name Cont.:
(35 character maximum)

DBA (Doing Business As):

Register Your Account to Become a City Supplier



Doing Business with the City



The screenshot shows the City of Houston website's Supplier Registration Confirmation page. The header includes the City of Houston logo and navigation links: HOME, I WANT TO..., GOVERNMENT, RESIDENTS, BUSINESS, DEPARTMENTS, VISITORS. A search bar is present with the text "WebSite" and "My ZIP Code 77002". The main content area is titled "Supplier Registration Confirmation" and includes a "Thank you for registering..." message. It provides instructions for activating the registration and receiving a supplier number, along with contact information for the Supplier Assistance Desk. A sidebar on the left lists various supplier services like "SUPPLIER HOME", "BID SEARCH", "WEB ACCOUNT PROFILE", "SUPPLIER REGISTRATION INFO", and "LOGOUT". The footer contains navigation links for Home, 311 City Helpline, E-Mail the Mayor, E-Mail the SPD Webmaster, FAQ's, and Privacy Policy, along with a copyright notice for 2011.

City of Houston
Official Site for Houston, Texas

HOME | I WANT TO... | GOVERNMENT | RESIDENTS | BUSINESS | DEPARTMENTS | VISITORS

Search WebSite Entire Site... My ZIP Code 77002

Strategic Procurement Division (SPD) Home > Supplier Registration Form > Registration Confirmation

SUPPLIER SERVICES

- SUPPLIER HOME**
View/Manage online bids
- BID SEARCH**
Search for Bids & RFPs
- WEB ACCOUNT PROFILE**
Update Your web Account Profile and Password
- SUPPLIER REGISTRATION INFO**
Update Your Supplier / Company Profile
- LOGOUT**

Supplier Registration Confirmation

Thank you for registering...

To activate your supplier registration and receive a supplier number, you **must** email or fax your IRS Tax Form W9 or W8 (for companies outside the US) to the City of Houston Supplier Assistance Desk.

Email Address: HoustonPurchasing@houstontx.gov

Fax Number: 832.393.8758

To add a remittance address, you will be required to have an existing supplier number. Remittance address must be different from the sales address. Once your IRS Tax Form is approved, a remittance address can be added if needed. Contact the Supplier Assistance Desk at 832.393.8800 for further assistance.

Our bids/RFPs are available at http://purchasing.houstontx.gov/bid_download.aspx.

Home | 311 City Helpline | E-Mail the Mayor | E-Mail the SPD Webmaster | FAQ's | Privacy Policy

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Procurement Overview



Procurement Overview



To be successful

- Understand the types of solicitations and method of procurement used by the government
- Respond appropriately to solicitations with proposals that win contracts!



Procurement Overview

Types of Solicitations



Solicitations used for procuring goods and services for the City of Houston:

- Purchasing Cards (PCards)
- Purchase Orders (POs)
- Emergency Purchase Orders (EPOs)
- Informal Bids
- Formal Bids
- Request for Proposals (RFPs)***

* An RFP may be preceded by a Request for Qualifications (RFQ) in certain instances



Procurement Overview



Purchases of and under \$50,000

- ❑ Informal bids
- ❑ Not required by law to be publicly advertised
- ❑ Methods of procurement:
 - ❑ **Non-competitive purchase:** If the price is less than \$3,000, purchase can be made from most convenient supplier/contractor, without contacting others
 - ❑ **Price quotations:** Quotes should be solicited from three or more contractors to ensure the price is fair. Typically for purchases between \$3,000 - \$50,000
 - ❑ **Sealed bid:** advantageous if the procurement is close to \$50,000



Procurement Overview



Procurements greater than \$50,000

- Formal bids
- Require City Council approval and compliance with procurement procedures to enter into a contract with the City
 - Types of Solicitations used:
 - Invitation to Bid (ITB)
 - Request for Proposals (RFPs)
 - Request for Qualifications (RFQs)
 - Contract types:
 - Goods & Non Professional Services
 - Professional Services
 - Construction



Procurement Overview

Formal Sealed Bidding



Invitation to Bid – for contracts over \$50,000

- ❑ The City awards contract to lowest bidder whose bid meets the terms and specifications of the **Invitation to Bid (ITB)** – (solicitation used for the sealed bid process)
- ❑ The ITB is the basic method for procuring supplies, non professional services or construction services with a contract value of \$50,000 or more.
- ❑ When using ITB process, the City typically awards contract to vendor that meets all City quality requirements and offers the lowest price*



Procurement Overview

Competitive Sealed Proposals



Request for Proposals (RFP) - for contracts over \$50,000

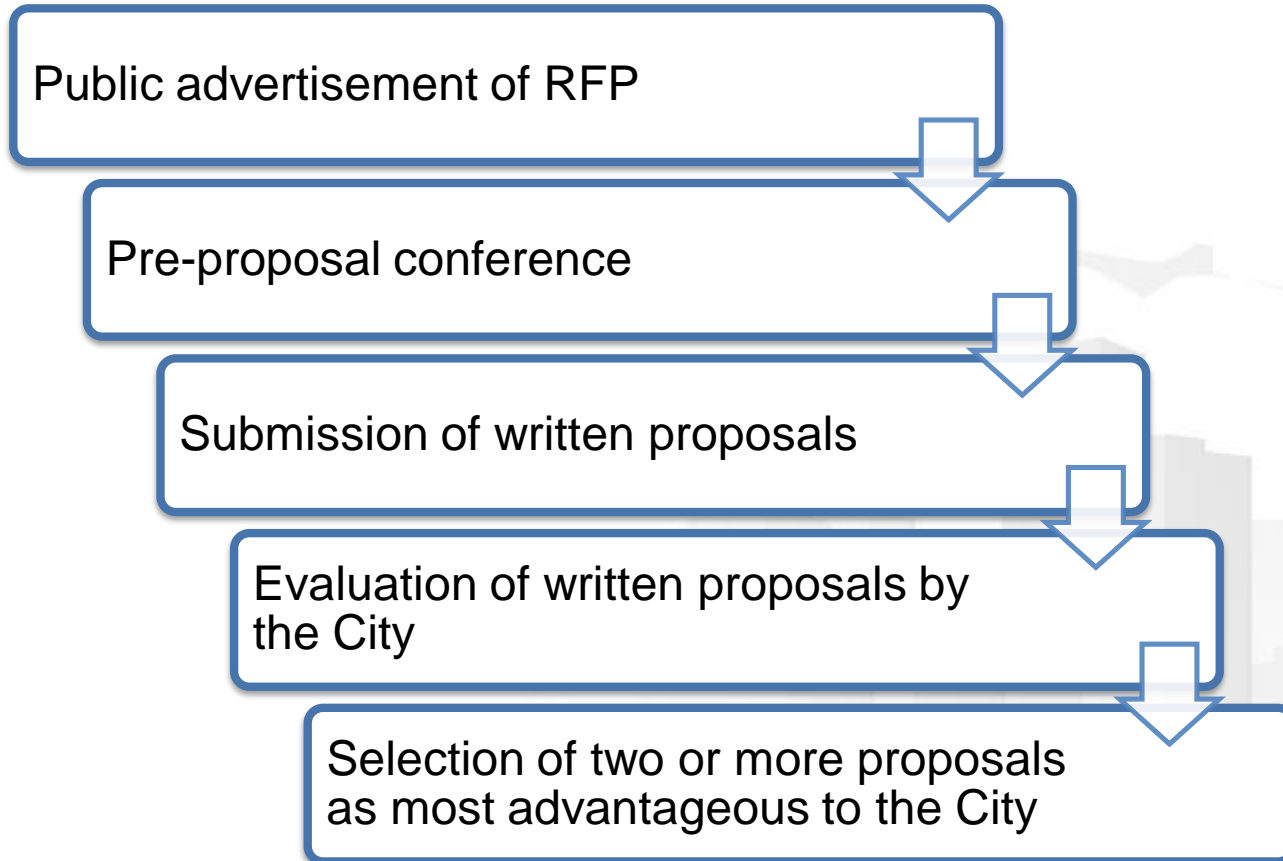
- ❑ Certain goods & services & construction contracts are procured by a competitive process known as **Request for Proposals (RFP)**
- ❑ Process permits City to weigh the proposals' merits, that also meet City's quality requirements;
- ❑ RFP process may not always result in selection of vendor offering lowest price
- ❑ Appropriate for procuring:
 - ❑ High technology goods & services
 - ❑ Certain Professional Services
 - ❑ Goods & Services where the best value may be a combination of price and other factors
 - ❑ Certain Construction Services



Request for Proposal (RFP)



The RFP process includes the following steps:



Request for Proposal (RFP)



The RFP process includes the following steps:

Oral presentations from selected proposers (optional)

Invitation to selected proposers to make Best and Final Offer (“BAFO”)

Evaluation of BAFOs, and contract negotiations with parties whose BAFOs are selected

Final selections of most advantageous proposal; award of contract by City Council



Methods of Procurement

Explaining RFQs



In some instances, an RFP may be preceded by a **Request for Qualifications (RFQ)**.

- ❑ Respondents are evaluated based solely on their qualifications in relation to the scope of services required.
- ❑ A select number of qualified firms is shortlisted.
- ❑ City then either enters into negotiations with the best qualified, or issues an RFP to the shortlisted qualified respondents (two-step method).
- ❑ Price is not solicited with the initial RFQ.
- ❑ Generally used for Professional Services, including engineering services, architecture, design build, construction manager-at-risk contracts etc.

Overview



Procurement Method	Used When	Advantages	Disadvantages
Formal Bids (ITB)	<ol style="list-style-type: none"> 1. Competition exists 2. The product or service is available from more than one source 3. Price is major difference between all responsive, responsible bidders¹ 	<ol style="list-style-type: none"> 1. Award process is simpler. 	<ol style="list-style-type: none"> 1. Does not encourage innovative solutions.
Competitive Proposals (RFP)	<ol style="list-style-type: none"> 1. When factors other than price are required/evaluated to get the required product/service 	<ol style="list-style-type: none"> 1. Allows factors other than price to be considered.² 2. Allows for customized solutions proposing different approaches to the business need. 	<ol style="list-style-type: none"> 1. Evaluations are more complex.
Request for Qualifications (RFQ)	<ol style="list-style-type: none"> 1. Selection is made solely on the skills and qualifications of the contractor. 	<ol style="list-style-type: none"> 1. Emphasizes the competency of the proposed contractors. 	<ol style="list-style-type: none"> 1. Contractor is selected before price is negotiated.



Procurement Opportunities



Strategic Purchasing advertisements and Notices to Bidders are publicly posted according to State Statute and Charter provision and are available from the following sources:

- ❑ Every Friday in the "Notice to Bidder" section of the Houston Business Journal. Some bid advertisements may be found in the Sunday edition of the **Houston Chronicle**, and various Industry Specific Networks and Business Journals
- ❑ Current contracting opportunities are also on the City website at <http://purchasing.houstontx.gov/bids.html> or at http://houstontx.gov/obo/current_contracting_opportunities.html





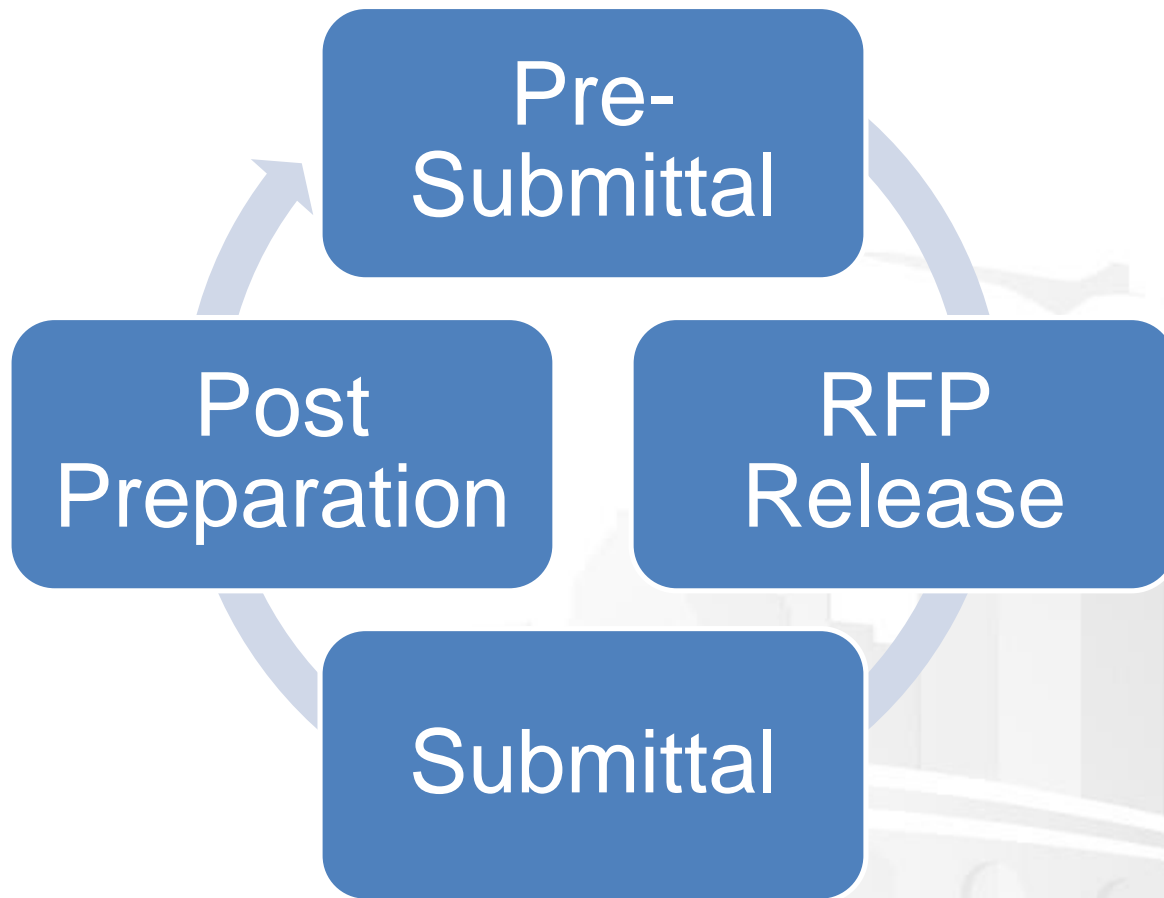
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The RFP Process



Four Phases of Success





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Pre-Submittal

Getting Ahead of the Competition



Pre-Submittal

Getting Ahead of the Competition



Laying the groundwork – primes, joint venture, or subcontractors

- Do you want to work as a Prime, joint venture, or Subcontractor?
- Identify opportunities
 - Who can benefit from your expertise?
 - Know the agency's short & long term goals.
- Use contract search function on : <http://purchasing.houstontx.gov/bids.html>
- Know the client
 - Be connected
 - Understand the organizational structure



Pre-Submittal

Getting Ahead of the Competition

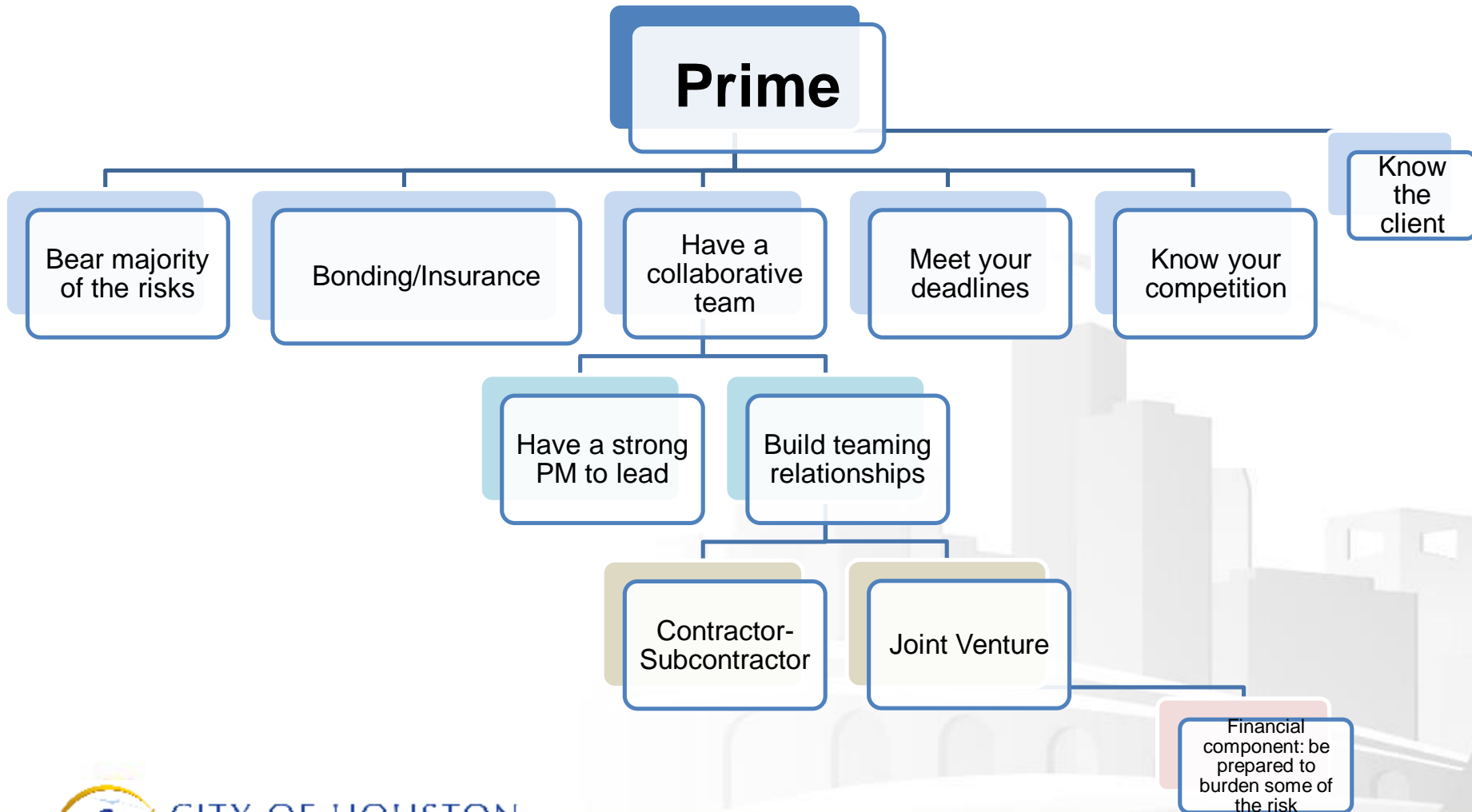


- ❑ Build & manage relationships
- ❑ Get familiarized with council committee procedures
- ❑ Market strategically
 - Understand your firm's major strengths.
 - Search for partners that compliment your firm.



Pre-Submittal

Going Prime?



Pre-Submittal

Want to be a Subcontractor?



Subcontractor

Prioritize networking

Attend pre-bid conferences to market your services and form potential business partnerships with attending prime contractors

Do your homework

Develop a strong "In House" Statement of Qualifications (SOQ)

Teaming relationships

Seek out primes who have worked on similar City projects

Know your competition





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RFP Release



The Magic of “3”

Read the RFQ/RFP “3” Times

- ✓ 1st time: Document Comprehension
- ✓ 2nd time: COH’s Project Objective
- ✓ 3rd time: Brainstorm the Scope Approach



First Steps



Understanding and Approach

- Calendar – Dates for pre-proposal conference, questions deadline and submittal deadline
- Highlight key information
- Understand the required format and minimum content requirements*
- Use the RFP checklist
- References requested
- Evaluation and selection process
- Procurement timeline



Helpful Tips



- Review master plan
- Research the issues
 - Brainstorm the solutions
- Create proposal outline
- Research and choose your subcontractors*
- Round up your team/team availability
- Project manager commitment
- Review the submittal schedule
- Start with a submittal outline



No Contact Period...



- Begins: Upon issuance of the solicitation
- Ends: On the date the City Secretary publicly posts notice of City Council Agenda containing the Applicable Award
- Applies To:
 - Appointed or elected officials
 - Employees of the City of Houston, their families or staff



No Contact Period...



- ❑ Exceptions:
 - ❑ Respondent's formal response to the RFP
 - ❑ Public communications during official pre-bid conference
 - ❑ Written requests for clarification by the contracting officer
 - ❑ Communications during an oral interview, at the behest of the City's evaluation committee

All inquiries regarding the solicitation are to be directed to the designated City Representative listed for the solicitation





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Submittal



Who Should Respond...



Team of Writers

- Project Manager – Identifies team, creates the technical approach.
- Firm's Proposal Coordinator – Contributes support materials (profiles, experience, template design, production).
- Document Editors – Commits review time.
 - Checks for grammar, spelling, punctuation





Reviewing the Statement of Work (SOW)

An important part of the RFP is the Statement of Work (SOW), which contains technical specifications, deliverables, and performance requirements of the goods & services to be bought. More than a description, the SOW specifies the performance requirements of the deliverables being requested.

It includes the following:

- Description of the services/products
- Specified drawings/schematics, if any
- Pricing methods
- Schedule of deliverables
- Contract term
- Level of experience
- Qualifications required



Submittal



RFP evaluations at minimum, consist of the following criteria:

Proposed Strategy or Operation Plan

- Demonstrates clearly how the proposer intends to successfully deliver the City requirement
- Includes detailed attributes like:
 - Project timeline
 - Deliverables
 - Functionality
 - Implementation

Experience, Expertise and Qualifications

- Relevance of proposers' experience, expertise and qualifications
- Past performance
- Key personnel with relevant experience
- Subcontractors performing critical aspects of the contract

Cost or price evaluation

- Not the biggest factor in determining.
- If required, team evaluates cost or price using formulas specific to either low or high bid solicitations

... so ensure your proposal tackles each!

Submittal Do's and Don'ts



DOs:

- ✓ Read through the entire solicitation, including schedules, clauses and attachments multiple times
- ✓ Realize best value considerations
- ✓ Offer detailed responses to avoid technical weakness, and substantiate how you can perform the desired work.
- ✓ Refer to historical government data when factoring in price / Conduct due diligence by researching pricing for similar projects*

Submittal Do's and Don'ts



- ✓ Highlight your capability in the proposal – including in past performance
- ✓ Provide a well written, readable, and error free proposal. Proofread.
- ✓ Clarify/Ask questions!
- ✓ Prioritize and submit proposal on time



Submittal Do's and Don'ts



DON'T:

- Use boilerplate proposal templates
- Have errors in submission
- Lack specificity or focus
- Highlight too much fluff and not enough substance
- Submit an incomplete or late submission



Submittal Submission Requirements



Submission requirements example

- Cover letter
- Executive Summary: proposed solution and strategy overview, key personnel
- Detailed Methodology and Solution Proposed
- Qualifications and Experience of the Proposer and key personnel*
- M/WBE Participation (if required)
- Financial Stability
- Conflict of Interest
- Forms and Certifications
- Price Proposal



Submittal

Submission of Proposal



Submittal procedure example

Once your proposal is signed and sealed...

- ❑ Submit **seven** copies of the Proposal, including one printed original signed in Blue ink (clearly marked “Original”), four copies (clearly marked “Copy”), and one electronic copy on a flash drive*
- ❑ Copies must be submitted in sealed envelopes/boxes bearing the solicitation number (from 1st page of RFP)
- ❑ Mail or personally deliver copies to the City Secretary’s Office, City Hall Annex





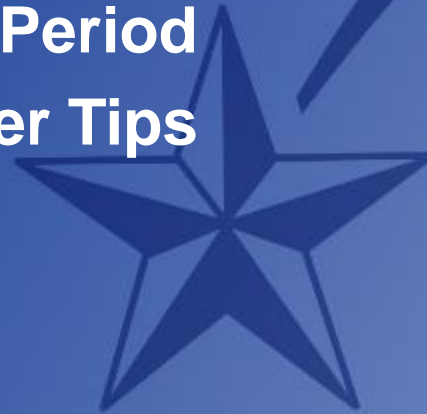
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Waiting for the Shortlist

Post Submittal Period

Insider Tips



Post Submittal Period



- ❑ Once all proposals are submitted, an **Evaluation Committee** meets to discuss and ensure the best-qualified proposer is selected.
- ❑ The team leader, on discussion with evaluation team members, assigns relative weights to the matrix.
- ❑ Each evaluation member completes a **scoring matrix** to score individual responses based on criteria defined in solicitation document. After group discussion, team leader tabulates score sheets and determines shortlisted firms.



Post Submittal Period



Sample evaluation criteria

Sample Evaluation Criteria	Sample Weight
Cost	40%
Proposed services, including work plan and methodology	40%
Experience, skills and qualifications of company and staff	15%
Financial information	5%



Post Submittal Period



After the evaluation, the following steps take place:

Selection of two or more proposals as most advantageous to the City

Oral presentations from selected proposers (optional)

Invitation to selected proposers to make Best and Final Offer (“BAFO”)

Evaluation of BAFOs, and contract negotiations with parties whose BAFOs are selected

Final selections of most advantageous proposal; award of contract by City Council



Post Submittal Period

“Now What?”



Plan ahead.

Identify potential questions and develop a strategy for a presentation.

Interviewers are City representatives with subject matter expertise. Determine personnel germane to project, with a combination of soft & technical skills to bring to potential interview.

Prepare for the next step.

Monitor RFP selection timeline.

Stay connected.





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OBO's Role



OBO's Role in the Procurement Process

To promote the

- ❑ Utilization of Minority/Women, Small (SBE) and Persons with Disabilities Business Enterprises (M/W/S/PDBEs) in City of Houston funded contracts.
- ❑ Utilization of Disadvantaged Business Enterprises (DBEs) in Department of Transportation (DOT) Federal Aviation Administration (FAA) financially-assisted contracts.
- ❑ To improve access to COH & HAS contract opportunities for M/W/S/PDBE companies.
- ❑ To ensure compliance with local, state, and federal mandates.



Office of Business Opportunity Mission

- ❑ The Office of Business Opportunity is committed to creating a level playing field on which:
 - ❑ M/W/S/P/DBEs can participate in an environment that removes barriers
 - ❑ Ensures non-discrimination
 - ❑ Provides the tools necessary to compete successfully within the City of Houston



What OBO Can Do For Businesses



- ❑ Provide contracting opportunity information to M/W/S/P/DBEs .
- ❑ Serve as an advocate for M/W/S/P/DBEs and support policies and activities to maximize their participation on City contracts.
- ❑ Assist Prime Contractors with identifying certified M/W/S/P/DBEs to participate on contracts as subcontractors and concessionaires.
- ❑ Educate M/W/S/P/DBEs on how to access COH contracting opportunities.



What OBO Can Do For Businesses



- Monitor M/W/S/P/DBEs utilization on contracts with participation goals.
- Ensure that wage standards are met on all construction projects with Federal and City funding.^[L]_[SEP]
- Host small business and minority forums for networking.^[L]_[SEP]
- Provide information and referral services to M/W/S/P/DBEs



Doing Business with the City

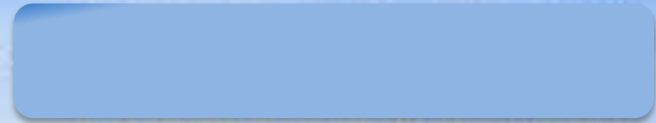


Useful links:

1. Guide to Doing Business with the City:
<http://purchasing.houstontx.gov/guide.html>
2. Procurement Manual:
https://www.houstontx.gov/legal/coh_procurementmanual.pdf
3. Vendors Guide:
http://purchasing.houstontx.gov/SPD_eBid_VendorsGuide.pdf
4. Formal Bids & RFPs:
<http://purchasing.houstontx.gov/bids.html>



**"That RFP process was so fun,
let's do it again next year."**





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Questions?

