Module 2: Preparation

- Getting Ready to write a Proposal

Presented by
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GF PTAC Director
Workshop Overview

Four Weeks – 4 Modules

**Module 1** - The Preliminaries (Learning the “rules of the road”)
✓  Wednesday, February 23rd *(Completed)*

**Module 2** – Preparation (Getting Ready to Write a Proposal)
✓  Today, March 2nd

**Module 3** – Execution (Organizing a responsive proposal)
✓  Thursday, March 10th

**Module 4** – Follow-up (Building a relationship, win or lose)
✓  Wednesday, March 16th

*(Exercises (8 along the way!) Putting what you learn into practice)*
Preparation

Here’s what we’re going to talk about today:

- **Identifying** the government’s needs.
- **Envisioning** how you can be a solution.
- **Offering ideas** for RFP development.
- **Anticipating** what will be called for.
- **Participating** in pre-proposal conferences.
- **Identifying** resources needed.
- **Forming** a team, if necessary.
Preparation

Identifying the government’s needs:

- Conduct market research.
- Identify end user.
- Meet and develop a relationship with the end user.
- Identify customer’s needs.
- The incumbent?
- Listen and interpret.
- Be a solutions provider.
Preparation

Envisioning how you can be a solution:

- Problems/Problem-Solver.
- What problems are likely to exist?
- Fears/Reassurances.
Preparation

Offering ideas for RFP development:

- Respond to “sources sought”.
- Provide information.
- Identify evaluation committee.
- Identify anyone who knows the end users.
Preparation

Anticipate what will be called for:

- Work performed of similar size and scope.
- References.
- Evidence of financial capacity.
- Resumes of principals.
- Qualifications of team members.
- Vendor registrations.
- Certifications and pre-approvals.
Preparation

Participate in pre-proposal conferences:

Prepare yourself, your questions, and your materials.

Don’t attend, *participate*.

Potential partner, competitor, decision-maker.

Your goal: Meet and impress everyone.
Preparation

Identify Resources Needed:

- Designate who’s got the lead.
- Put together a schedule.
- Identify documents, specifications and standards needed.
- Form a Blue Team and a Red Team.
Preparation

The Blue and Red review teams:

- The Blue Team Review - basic outline of the proposal.
- The Red Team Review - evaluators/selection committee.

Even if you don’t have the resources to form Review Teams, know that “review is essential”!
Preparation

Form a team to perform the work:

- Incumbent’s performance.
- Meet all the requirements/or assemble a team.
- Score yourself (*Red Team’s job*).
You learned about the need to:

✓ **Conduct** market research.

✓ **Identify** potential buyers of your products or services.

✓ **Incumbent** - how satisfied the government is.

✓ **Participate** in the pre-proposal conference.

✓ **Identify** resources needed, including partners.
An Exercise

Putting what You learned into Practice

Pre-Proposal Conference

Concrete Walkway and Patio for the City of Forest Park P.D.
Concrete Walkway and Patio

City of Forest Park Request for Proposals
Police Department Firing Range

**Mandatory Pre-Proposal Conference** May 16, 2021 at 10 am
**Proposal Deadline** May 26, 2021 at 2 pm

**Purpose:** The City of Forest Park is seeking proposals from qualified vendors for the total lump cost to **pour concrete walkways and patio at the Firing Range.** Contractor shall grade, form and shape the areas as needed for proper drainage, installation of base material and installation of new concrete per the layout on file with the Director of Public Works. The contractor shall be responsible for any off-site removal/disposal.

**Scope:** The contractor will furnish a proposal and price for all materials, labor and equipment to complete the job. The contractor must familiarize himself with the sites, all details of the work required, and existing conditions. The successful vendor will be required to work closely with the Public Works Department Street Division on all phases of the project. **The contractor must be an on-going entity for at least 5 years and produce a valid certificate of liability insurance which must be on hand before work begins.** All work will be permitted and inspected through the Forest Park Planning Building and Zoning Department.

If you have any questions, contact Jeffrey Eade of the City of Forest Park Public Works Department at (XXX) 608.2310 or by email at jeade@forestparkpw.com.

[Logo: MONTANA PTAC, UNTAME YOUR ENTREPRENEURIAL SPIRIT]

[Logo: Great Falls Montana, GrowGreatFallsMontana.org]
The City of Forest Park will hereinafter be referred to as the "City." Respondents to the RFP shall be referred to as "Bidders." The Bidder to whom the contract is awarded shall be referred to as the "Contractor."

City of Forest Park Request for Proposals Concrete Walks and Patio, PD Firing Range

General Requirements & Specifications:

- All concrete work shall be performed in accordance with accepted industry standards and codes for cast-in-place concrete including, but not limited to, temperature recommendations, reinforcing, measuring, transporting, and placing of concrete.
- Mobilization of equipment and crews within seven days of NTP
- Provide means and methods for all construction phases to meet GDOT standards and specification for sidewalks, A3.
- The Contractor shall provide all required materials, labor, equipment, permits and inspections to provide a 100% completed project. The Contractor shall contact Forest Park Planning Building and Zoning at (XXX) 608-2300 for permit information
- Subgrade must be compacted to 95% of max.
- Upon completion of forming for each upcoming pour, the Contractor will contact the City Project Manager to perform a site visit to review the site for the upcoming pour. The Contractor will provide the City Project Manager with at least 24-hour notice. No concrete pours will be made without approval from the City Project Manager.
- Prior to pouring, the area shall be graded for proper drainage and compacted with the appropriate construction equipment. Water shall pitch away from building and the range walkways.
- Expansion joints shall extend across the full width of the walk and patio and on each side of the intersecting walk. Control joints will be hand tooled and spaced no more than 10 feet apart at 3/8" depth.
Concrete shall be Type A, at 4" thick and 3000 psi at 28 days with a 2% max slope.
Concrete shall have a light non-slip broom textured finish.
Barricades and necessary safety devices will be the responsibility of vendor.
Vendor shall use 811 for utility locations.
Minimum 2-year warranty on all materials, Minimum 1 year warranty on all labor, guarantee of no cracks
All work must be completed within 30 calendar days after the NTP has been issued
All Concrete delivery invoices shall be provided to the City Project Manager prior to payment being issued.

Qualifications: All bidders must be licensed, qualified, and understand how to identify the most effective and efficient method to complete the project.

Communication: It is the responsibility of the vendor to inquire about any requirement of this RFP that is not understood. Responses to inquiries, if they change or clarify the RFP in a substantial manner, will be forwarded by addenda to all parties that attended the pre-proposal meeting. The City will not be bound by oral responses to inquiries or written responses other than addenda. Inquiries about the RFP must be made to: Jeffrey Eade, Public Works Director jeade@forestparkpw.com The deadline for all inquiries is May 23, 2021 at noon.

Evaluation: Award will be made to the bidder considered most qualified who will act in the best interest of the City and whose proposal meets the demands of the City. Bid packages must include at least three (3) references. These references should represent agencies utilizing the bidders services as outlined in the proposal. Provide company names with contact person and telephone number.
Evaluation Criteria: Proposals will be evaluated on many criteria deemed to be in the City's best interests to include but are not be limited to:

- Understanding of the project
- Method of approach
- Ability to meet specifications
- Pricing & Value
- Responsiveness to proposal terms and conditions
- References
- Schedule
- Workmanship and material warranty
- Experience in providing the services specified in this RFP.

Pre-proposal: **There is a mandatory pre-proposal conference** that will allow for a detailed discussion of the staff and use patterns, our services and the City’s expectations. At this time, bidders will have an opportunity to address any questions, and communicate the feasibility of the City’s expectations. **If bidders do not attend this conference and still submit a bid package, their bids will not be considered valid** and will not be considered for award. The pre-proposal conference and walk through will be held on May 16, 2021 and begin promptly 10:00 am at the Forest Park Public Works Dept. We will travel to the site from this location.

Award: The City reserves the right to conduct any tests it may deem advisable and to make all evaluations. **The City reserves the right to reject any or all bids**, in whole or in part and is not necessarily bound to accept the lowest bid but instead will accept the bid that best suites the City and the City’s services. **The City reserves the right to waive minor irregularities. A bid may be rejected if it is in any way incomplete or irregular.** When there are tie bids, there shall be a preference for local.
It is the responsibility of the bidder to inquire about any details of this RFP that are not understood. All inquiries must be submitted by email. Responses to inquiries, if they change the RFP in a substantial manner, will be forwarded by email addenda to all parties that attended the pre-proposal meeting. Therefore, it is the responsibility of the bidder to ensure an email address has been provided.

**Submission:** A SIGNED original and three (3) copies of the bid must be received at Forest Park City Hall. Deadline for submittals is May 26, 2021 at 2 pm. The bid must be date/time stamped by Forest Park City Hall in order to be considered. Bidders are strongly encouraged to submit bids in advance of the due date/time to avoid the possibility of missing the deadline due to unforeseen circumstances. Bidders assume the risk of the methods of dispatch chosen. The City assumes no responsibility for delays caused by any package or mail delivery service or unforeseen condition. A postmark on or before the due date will NOT be a substitute for receipt of bid. Bids received after the due date and time will not be returned. Additional time will not be granted to any single bidder, however, additional time may be granted to all bidders when the City determines that circumstances require it. FAXED OR E-MAIL BIDS WILL NOT BE ACCEPTED.

**Bid Bond:** Each BID must be accompanied by a BID Bond payable to the OWNER for five percent of the total amount of the BID. As soon as the BID prices have been compared, the OWNER will return the BONDS of all except the three lowest responsible BIDDERS. When the Agreement is executed the bonds of the two remaining unsuccessful BIDDERS will be returned. The BID BOND of the successful BIDDER will be retained until the payment BOND and performance BOND have been executed and approved, after which it will be returned. A certified check may be used in lieu of a BID BOND. A PERFORMANCE BOND and a PAYMENT BOND each in the amount of 100 percent of the CONTRACT PRICE, with a corporate surety approved by the OWNER, will be required for the faithful performance of the Contract. Attorney in fact who sign BID BONDS or payment BONDS and performance BONDS must file with each BOND a certified and effective dated copy of their power of attorney.
**Insurance Requirements:**

A. Statutory Workers Compensation Insurance Employers Liability Bodily Injury Accident - $100,000 Each Accident Bodily Injury by Disease - $500,000 Policy Limit Bodily Injury by Disease - $100,000 Each Employee

B. Comprehensive General Liability Insurance $500,000 Limit of Liability per Occurrence for bodily injury and property damage.

C. Auto Liability Insurance $500,000 Limit of liability per occurrence for bodily injury and property damage. Comprehensive form covering all owned, non-owned and hired vehicles.

D. Umbrella Liability Insurance- $1,000,000 limit of liability

**Envelope:** The signed bid should be submitted in an envelope or package, sealed and identified on the outside of the envelope with contact name, contact email, company name and due date.

**Bid Opening:** The bid packages will be opened and bid amounts recorded immediately after the deadline for submittal at Forest Park City Hall. For all bids that clearly identify a primary contact, provide an email address for the primary contact, a list of the submitted bids with company name, and bid amount will be sent via email.

**Materials to Include:**

1. Contact Information
2. Description of Company
3. Project Proposal
4. Credentials of Relevant Staff
5. List of Proposed Subcontractors (if any)
6. Basis of Pricing
7. E Verify Affidavit or Statement
8. Certificate of Insurance
9. Professional Certifications
10. References as previously described.

All of the proposals are due on or before May 26, 2021 at 2 pm. Each proposal will be evaluated by the appropriate staff. Three (3) bidders may be placed on a "short list" and MAY be asked to come in for an interview. If so, the bidders that are selected to come in for an interview may be asked to submit additional information. You will be notified within one (1) week prior to the interview date of any additional information that will be needed from our office. We reserve the right to ask for clarification or additional information contained so that a fair and comprehensive evaluation of all proposals can be conducted. If only 3 bids are received, the City reserves the right to terminate this process and begin again or to choose from the 3 submissions.
**Debarment:** Submission of a signed bid in response to this solicitation is certification that your firm (or any subcontractor) is not currently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction by any State or Federal department or agency. Submission is also agreement that the City will be notified of any change in this status.

**Affidavit:** Bidder shall make an oath in writing that he/she has not engaged in any collusive or anti-competitive practices in the responding to the bid. Declaration of non-collusion is a statement that the bid submitted is a bona fide bid prepared independent of other bidders, without collusion or fraud (bid rigging, price fixing, rotation of award, etc.)

**E-Verify:** E-Verify- All Vendors must submit an affidavit to certify that they participate in the Federal Employment Eligibility Verification. Participation in the E-Verify program must commence before the proposal deadline, and E-Verify affidavit is included in the package.

**Proposal Form:** Having carefully examined the request for proposal for concrete improvements at the PD Firing Range inside the City Limits of Forest Park and having visited the site, examined and become familiar with all conditions affecting the cost of the work. The undersigned hereby propose to furnish all labor, material, equipment and incidentals; and to perform all work in the manner and form as provided. It is the responsibility of the bidder to furnish with their bid a list clarifying any and all deviations from these specifications, written or implied, in order that a fair and proper evaluation can be made. Those bidders not submitting a list of deviations will be presumed to have bid as specified.
TOTAL AMOUNT COST: _

DATE OF COMPLETION WILL BE TAKEN INTO CONSIDERATION WHEN AWARDING BID. LENGTH OF TIME TO COMPLETE PROJECT: _

DATE TO COMMENCE WORK AFTER NOTIFICATION: _

COMPANY NAME: _ ADDRESS:_ CITY_STATE_ ZIP CODE_ E-MAIL: _ PHONE #: _ NAME OF BIDDER: _

SIGNATURE OF BIDDER_DATE: _

WARRANTY PERIOD: _

CITY OF FOREST PARK

**Bidders Qualification Sheet**

Company Name _ Name _Title_ Address _ City _ St. _ Zip_ Phone _ Fax _ E-Mail_ 1. Number of years of experience bidder has in the type of work described in specifications. _ 2. Name & location of places where similar services have been performed in the past five (5) years and indicate date and year of contracts and name of person to contact who approved Bidders work. Name Location Year Contact Phone # _ 3. Number of employees specifically hired by proposer to perform services of type specified. Supervisory _ Laborers_ 4. Additional Information _ _ _ _ Signature & Title of Person Preparing this Form Date
CONTRACTORS AFFIDAVIT AND AGREEMENT By executing this affidavit, the undersigned contractor verifies its compliance with State Code 13-10-91, stating affirmatively that the individual, firm, or corporation which is contracting with the City of Forest Park has registered with and is participating in a federal work authorization program - EEV/Basic Pilot Program operated by the U.S. Citizenship and Immigration Services Bureau of the U.S. Department of Homeland Security, in conjunction with the Social Security Administration (SSA), in accordance with the applicability provisions and deadlines established in State Code 13-10-91. The undersigned further agrees that, should it employ or contract with any subcontractor(s) in connection with the physical performance of services pursuant to this contract with the City of Forest Park, Contractor will secure from such subcontractor(s) similar verification of compliance with State Code 13-10-91 on the Subcontractor Affidavit provided in Rule 300-10-01-.08 or a substantially similar form. Contractor further agrees to maintain records of such compliance and provide a copy of each such verification to the City of Forest Park at the time the subcontractor(s) is retained to perform such service. *EEV/Basic Pilot Program* User Identification Number _ _ BY: Authorized Officer or Agent Date (Contractor) _ Title of Authorized Officer or Agent _ Printed Name of Authorized Officer or Agent _ SUBSCRIBED AND SWORN BEFORE ME ON THIS THE _ DAY OF _ , 20_ _ Notary Public My Commission Expire City of Forest Park Request for Proposals Concrete Walks and Patio, PD Firing Range NON-COLLUSION OATH COUNTY OF:_ STATE OF:_ Before me, the Undersigned Bidder being duly sworn on oath, a Notary Public, for and in the County and State aforesaid, personally appeared _and made oath that the Contractor herein, his agents, servants, and/or employees, to the best of his knowledge and belief, have not in any way colluded with anyone for and on behalf of the Contractor, or themselves, to obtain information that would give the Contractor an unfair advantage over others, nor have they colluded with anyone for and on behalf of the Contractor, or themselves, to gain any favoritism in the award of the contract herein. He or she further states that no person or person, firms, or corporation has, have or will receive directly or indirectly, any rebate, fee gift, commission or thing of value on account of such sale.
Oath and Affirmation I hereby affirm under the penalties for perjury that the facts and information contained in the foregoing bid for public works are true and correct. Dated this day of _, _. Authorized Signature for Contractor: _ Title: _ Contractor's name (print): _ City of Forest Park Request for Proposals Concrete Walks and Patio, PD Firing Range SWORN TO BEFORE ME THIS _DAY OF_, 20_ NOTARY PUBLIC FOR THE STATE OF _ My Commission Expires: _ Notary Public Signature_ Printed Name:_ Phone Number:_ Address:_ _ (Note: Notary seal required for foreign Contractor.) For more information about this opportunity please contact the buyer directly.
Exercise #1

**Pre-proposal conference** - Concrete Walkway & Patio

1. What does the government expect to happen at a pre-proposal conference?
2. Why should you attend the pre-proposal conference?
3. What is unique about this pre-proposal conference?
4. What should you ask about at this event?
Upcoming Workshops

Next Two Weeks – 2 Modules

**Module 3** – Execution (Organizing a responsive proposal)
- Thursday, March 10th

**Module 4** – Follow-up (Building a relationship, win or lose)
- Wednesday, March 16th
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Thank You!