



**EAST  
POINT**  
GEORGIA

# Proposal Writing 101

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FOR EAST POINT BUSINESSES

AUGUST 17, 2022, 10AM-12NOON



# Proposal Writing 101 - Agenda

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THE RFP	YOUR RESPONSE	ORGANIZATION	CHECKLIST
RFP General Instructions	Make sure you are registered with Ion Wave Technologies	In order of appearance in the RFP	Follow checklist provided
RFP Base Document – note the important dates	Save all credentials and other documents you need to your computer	Exhibit order	Titles should match RFP
Exhibits	Write your proposal using: <ul style="list-style-type: none"><li>- Project Description</li><li>- Scope of Work</li><li>- Evaluation Criteria</li></ul>	Attach documents (.pdf) and upload into Ion Wave Technologies	Not applicable items should be labeled “N/A”

# Proposal Writing 101 – Best Practices

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- ✓ Organizing your proposal and sections
- ✓ Writing a winning proposal (what to write about)
- ✓ Formatting responses



# What A Proposal Isn't

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A Technical Report



An Academic Study



Not Just Paperwork



Not all about YOU –  
it's about your  
client/customer



# What A Proposal Is

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A MARKETING  
DOCUMENT



RESPONDS TO THE  
STATED NEEDS OF  
YOUR CUSTOMER



A LEGAL DOCUMENT  
AND PROJECT PLAN



# RFP Sample Case Study: Workers' Compensation Third Party Claims Administrator

Submittal  
Instructions

Exhibit "A"  
Project Overview

Exhibit "B"  
Schedule

Exhibit "C" Scope  
of Work and  
Deliverables

Exhibit "D"  
Evaluation  
Criteria and  
Scoring Metrics

Exhibit "F"  
Submittal  
Requirements



# RFP Sample Case Study: Workers' Compensation Third Party Claims Administrator



## The Department of Contracts and Procurement

### RFP GENERAL INSTRUCTIONS

#### 1.0 OBTAINING THE SOLICITATION DOCUMENTS

The City requires all companies and/or individuals interested in conducting business with the City to register in the City's web based Ionwave Technologies registration system. Registration is free and enables the registering company to gain access to the City's solicitation information and solicitation materials maintained in the Ionwave Technologies system. This solicitation can be downloaded the Ionwave website, located at <https://eastpointcity.ionwave.net/Login.aspx>.

#### 2.0 CLARIFICATION AND ADDENDA

- 2.1 Proposers may submit requests for clarifications or interpretations regarding this solicitation. Proposers must prepare such requests in writing for the City's consideration as set forth in this section of the solicitation. This section places no obligation on the part of the City to respond to any request for clarification or interpretation, and the City's failure to respond to any such request will not relieve the Proposers of any obligations required herein. Requests for clarification or interpretation regarding this solicitation shall be submitted via email to the contact person listed on the RFP Cover Sheet. The subject line shall include RFP number and title.
- 2.2 No oral interpretation, instruction, or information concerning this solicitation given by any employee or agent of the City shall be binding on the City. Proposers who tender a submittal in reliance on any such oral information risk having their submittal deemed non-responsive by the City. All responses to written requests for clarification, interpretation, or additional information will be distributed as numbered addenda to this solicitation and posted on the City of East Point website <https://eastpointcity.ionwave.net/Login.aspx>. Each Proposer is required to acknowledge receipt of each addendum to this solicitation by including an executed acknowledgment form in their submittal. All responses to this solicitation shall be prepared with full consideration of the addenda issued prior to the Submittal Due Date.

#### 3.0 SUBMITTAL INSTRUCTIONS

- 3.1 The response to these requirements will constitute the proposal package. Proposal responses uploaded to the City's Ionwave Technologies system are expected to adhere to the City's required proposal format. Each Proposer has a continuing obligation to provide the City with any material changes to the information included in its proposal. To assure consistency, RFP submittals must conform to the format contained herein and include the information requested under each Tab below. Proposals shall comply with the following requirements:
- One (1) proposal marked "original"
  - Paper size shall be 8 1/2" x 11"
  - Maximum font size of twelve (12) and a minimum font size of ten (10).
  - Each page of the original RFP submittal must be numbered
  - A Cost Proposal shall be submitted as a **separate** file (and must not be a part of the proposal file)
  - The proposal must be in .pdf format
- 3.2 Proposals shall be submitted to the City via document upload to the City's Ionwave Technologies system located at <https://eastpointcity.ionwave.net/Login.aspx>. Fax, emails, in-



## The Department of Contracts and Procurement

provide E-Verify Affidavits immediately upon the request of the City shall be considered "non-compliant" and/or "non-responsive" and shall not receive Contract award consideration.

- 4.1.5 Downloadable E-Verify Contractor's (Prime Offeror's) Affidavit, an E-Verify Subcontractor's Affidavit and an E-Verify Sub-subcontractor's Affidavit have been included on the City's web site for your convenience.
- 4.2 The City of East Point is required to verify the status of anyone who applies for a Public Benefit through the City. Public Benefits are defined by state statute, O.C.G.A. § 50-36-1, by Federal statute, 8 U.S.C. §1611 and 8 U.S.C. §1621, and by the Office of the Attorney General. Pursuant to these definitions, contract awards by the City of East Point are considered "Public Benefits." Beginning on January 1<sup>st</sup>, 2012, any person awarded a Public Benefit must show a secure and verifiable document and complete the S.A.V.E. Affidavit. It is, therefore, recommended by the City that the copy of the S.A.V.E. Affidavit be submitted in the RFP response package to avoid any award delays. The Notary Seal on the SAVE Affidavit must be visible on the copy submitted.
- 4.3 Documents which are considered "secure", "verifiable" and therefore "acceptable" have been identified by the Office of the Attorney General. A list of those documents may be obtained directly from the State of Georgia (<http://law.ga.gov/immigration-reports>) or the Federal Government. Only Drivers Licenses with a star printed in the upper right-hand corner of the license are considered "secure" or "verifiable" documents. Drivers Licenses without such a star imprint will not be acceptable as identification proof, regardless of the issuing state.
- 4.4 The Selected Proposer shall be required to execute the S.A.V.E. Affidavit verifying their status and show a secure and verifiable document prior to the final award of any Contract by the City. A downloadable S.A.V.E. Affidavit has been included on the City's web site for your convenience.
- 5.0 PRE-PROPOSAL CONFERENCE
- 5.1 If it is felt necessary, Proposers are welcomed to visit the City and its environs at their leisure and on their own time; however, tours of buildings, and/or meetings and/or discussions with City personnel and/or elected or appointed officials shall not be scheduled and shall not take place and, therefore, must not be anticipated. See Section 11 and Section 12 for further clarification regarding participation in such discussions. Note: all "sequester-in-place" or "shelter-in-place" orders issued by any governmental authorities must be obeyed and may prevent a visit to the city of East Point, Georgia. If the wearing of a mask or other face covering is required by the City, all Proposers are expected to comply with the requirement.
- 5.2 The City of East Point does not discriminate based on disability in the admission or access to its programs or activities. Any requests for reasonable accommodations required by individuals to fully participate in this solicitation or any meetings, programs, or activities associated with this solicitation should be directed in writing to the contact person listed on the RFP Cover Sheet. The subject line shall include RFP number and title.
- 6.0 RFP SUBMITTAL INSTRUCTIONS
- 6.1 Failure to submit the RFP response in the manner specified herein may result in the disqualification of the entire submittal.



## The Department of Contracts and Procurement

- 6.2 Only proposal responses uploaded into the Ionwave Technologies system, located at <https://eastpointcity.ionwave.net/Login.aspx>, shall be received on behalf of the City. Proposals uploaded after designated time/date will not be opened, downloaded, evaluated, nor given any award consideration regardless of how they are submitted.
- 6.3 RFPs shall not be submitted to the City or received by the City via the City's regular email system, U. S. Postal Service or delivered via courier or delivery service (FedEx, UPS, DHL, etc.). Do not copy nor send an RFP submittal to any other email address within the City or to any other person within the City. If you do so, you will be **disqualified** from participation in the solicitation and will forfeit any opportunity for Contract award.
- 6.4 The City is not responsible for the untimely receipt of solicitation responses regardless of circumstances. Proposers wishing to participate in this solicitation must follow the instructions detailed herein. Incomplete solicitation responses shall not be given award consideration and may be considered "non-conforming" and "non-responsive" to the requirements in the solicitation. The City's Ionwave Technologies System will not accept incomplete or inconsistent submittals.
- 6.5 Proposers who obtain specifications and plans from sources other than the City of East Point's Ionwave Technologies website are cautioned that the RFP package they receive may be incomplete or inaccurate in nature. All public addendums, tabulations, evaluation meeting notices, and recommendations of award will be posted on the City's Ionwave Technologies website located at <https://eastpointcity.ionwave.net/Login.aspx>. No other source should be trusted.
- 6.6 Proposers must include all the Request for Proposals (RFP) requirements. A Cost Proposal is to be submitted as a **separate** file and must not be a part of the Proposal submittal file. The complete submittal shall consist of the following:
- 6.6.1 One (1) original RFP uploaded to the City's Ionwave Technologies website.
- 6.6.2 A maximum font size of twelve (12) and a minimum font size of ten (10) shall be used in the composition and preparation of the RFP submittal.
- 6.6.3 Each page of the original RFP submittal must be numbered with the exception of the blank tab sheets which do not need to be numbered, but may have the tab number in the middle of the page.
- 6.7 By submitting a signed proposal response into the Ionwave Technologies system, the Proposer certifies that there has been no collusion with any other Proposer. Reasonable grounds for believing a Proposer has an interest in more than one (1) proposal submittal will result in rejection of all proposal submittals in which the Proposer has an interest. Any party to collusion may not be considered in future solicitations for the same or similar work. When, for any reason, collusion or other anticompetitive practices are suspected among any bidders or Offerors, a notice of the relevant facts shall be transmitted to the City Attorney for further investigation and possible action.

# RFP Sample Case Study: Workers' Compensation Third Party Claims Administrator



RFP #  
RFP Title

## Exhibit "F"

### Submittal Requirements

#### Instructions:

1. Complete Provider's Contact Sheet using the subject: RFP No. 2022-XXXX – RFP TITLE
2. Create a Table of Contents
3. Organize the submittal based on the following seven (7) tabs:

#### Tab 1: Letter of Transmittal shall include: (limit 2 pages)

- a) The Provider's business organization type (i.e. corporation, LLC, partnership, etc.).
- b) The state of incorporation or organization.
- c) The name and address of the partners and indicate whether each partner is a general partner or limited partner, if applicable.
- d) The parent corporation (name and address), if applicable.
- e) Names and positions of the corporate officers.
- f) Statement as to whether the company is local, regional, national, or international.
- g) The names and addresses of company affiliations and/or subsidiaries.
- h) The address and telephone number of the Primary Office/Headquarters.
- i) The address and telephone number of the office responsible to provide the solicited services.
- j) If different elements of the work/services will be accomplished at different locations, those locations must be listed along with their areas of responsibility.
- k) The letter shall be signed by a representative who is authorized to contractually bind the Responder and shall include the agent's title or authority.

#### Tab 2: Elements of the Proposal: (limit 20 pages)

- a) Refer to Section 3.0 Submittal Guidelines of the RFP General Instructions.
- b) Previous Experience in Performing Similar Projects:
  - (1) Four (4) similar projects.
  - (2) Within the last five (5) years.
  - (3) With two of the four projects delivered to government or quasi-governmental entities.
- c) Qualification and Experience of Management:
  - (1) Include resumes.
  - (2) Certifications, and
  - (3) Experience relevant to the scope of work in this RFP.
- d) Approach and Plan to Meet the RFP requirements:
  - (1) Include a project plan and
  - (2) Detailed explanation regarding how the deliverables will be completed.



RFP #  
RFP Title

#### Tab 3: Credentials (not included in page limit)

Please provide all credentials/licenses/certifications, as required by the Scope of Work, i.e. general contractor's license, professional engineering license, law license.

#### Tab 4: Required Forms (not included in page limit):

- a) Current, valid Business License
- b) Business Registration or Annual Registration
- c) Authority to conduct business in the State of Georgia (Foreign Corporations Only)
- d) Certificates of Insurance
- e) Form W-9
- f) Signed Addenda Acknowledgement Forms (if applicable)
- g) Non-Collusive Form (Exhibit "H")
- h) Cost Proposal Form (Exhibit "I")
- i) E-Verify Affidavit (Exhibit "J")
- j) S.A.V.E. Affidavit (Exhibit "K")

#### Tab 5: Joint Ventures (not included in page limit):

- a) Provide copy of Joint Venture Agreement
- b) Certificate of Insurance in the name of the Joint Venture or the name of the individual joint venture partners

#### Tab 6: Review of Standard Contract (limit 2 pages)

List any terms and conditions that Provider disagrees with and would like to negotiate.

#### Tab 7: Local Vendor Preference (not included in page limit)

- a) Pursuant to the City's Municipal Code Section 4-3324 – Local Vendor Purchasing Preference. A "local vendor" or "local business" means any corporation, partnership, sole proprietorship, franchise, or other business form which:
  - 1) Has its headquarters, distribution point retail location, locally-owned franchise, or place of business within the territorial limits of the city, where work and business is and has been regularly conducted for at least six (6) months immediately prior to the issuance of the relative solicitation.



RFP #  
RFP Title

- 2) Holds all business of professional licenses required by state law, county ordinance, and city ordinance at the location within the city for at least six (6) months immediately prior to the issuance of the relative solicitation.
- 3) Complete the Local Vendor form Exhibit "L" and have it notarized.



# Tips For Organizing Your Proposal

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Develop a Proposal  
Outline



Conduct a Proposal  
Strategy Session



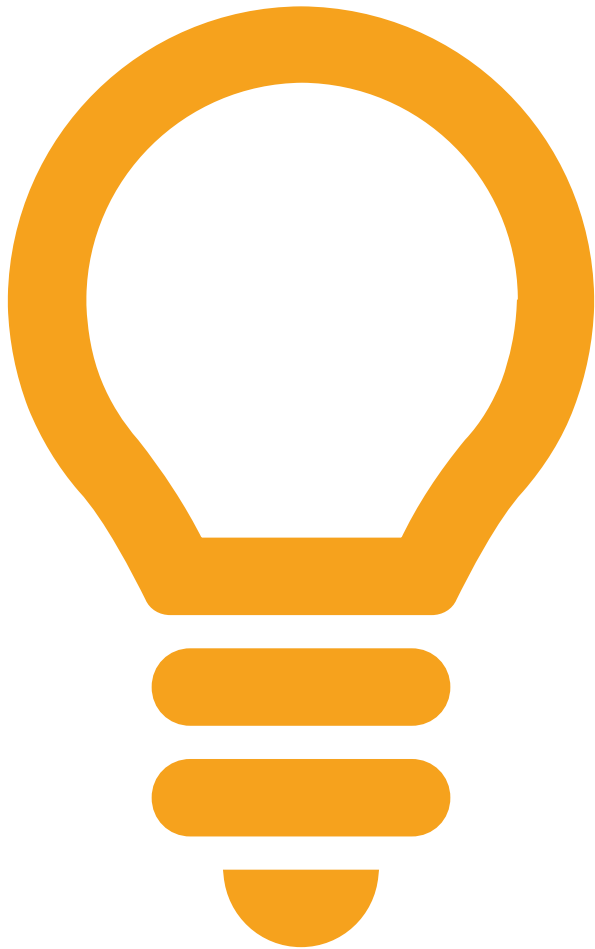
Develop a Work Plan



# Sample Proposal Outline/Work Plan\*

Title	RFP NO. 2022-1798 Workers' Compensation Third-Party Claims Administration			
Client Name	City of East Point			
RFP Release Date	7/15/2022			
RFP Due Date	7/8/2022			
RFP Due Time	3:30pm			
Delivery Method:	Proposals to be submitted electronically via the Ionwave Technologies System			
Contact Name/Info For Questions				
Deadline for Questions	7/1/2022 at 12pm			
RFP - Format and Requirements				
Format Requirements (font, margins, etc.)	To assure consistency, RFP submittals must conform to the format contained herein and include the information requested under each Tab below. Proposals shall comply with the following requirements: •One (1) proposal marked "original" •Paper size shall be 8½" x 11" •Maximum font size of twelve (12) and a minimum font size of ten (10) •Each page of the original RFP submittal must be numbered •A Cost Proposal shall be submitted as a separate file (and must not be a part of the proposal file) •The proposal must be in .pdf format			
Proposal Section	Client Requirements	Page Count	Responsible Person/Writers	Notes
Tab 1 Letter of Transmittal				
	a)The Provider's business organization type (i.e. corporation, LLC, partnership, etc.). b)The state of incorporation or organization. c)The name and address of the partners and indicate whether each partner is a general partner or limited partner, if applicable. d)The parent corporation (name and address), if applicable. e)Names and positions of the corporate officers. f)Statement as to whether the company is local, regional, national, or international. g)The names and addresses of company affiliations and/or subsidiaries. h)The address and telephone number of the Primary Office/Headquarters. i)The address and telephone number of the office responsible to provide the solicited services. j)If different elements of the work/services will be accomplished at different locations, those locations must be listed along with their areas of responsibility. k)The letter shall be signed by a representative who is authorized to contractually bind the Responder and shall include the agent's title or authority.	2	John Doe and Jane Doe	
Tab 2 Elements of Proposal				
Previous Experience in Performing Similar Projects	(1)Four (4) similar projects (2)Within the last five (5) years (3)With two of the four projects delivered to government or quasi-governmental entities		Jim Smith	
Qualifications and Experience of Management	(1)Include resumes, (2)Certifications, and (3)Experience relevant to the scope of work in this RFP.		Jane Smith	
Approach and Plan to Meet the RFP Requirements	(1)Include a project plan and (2)Detailed explanation regarding how the deliverables will be completed.		Bob Williams	
Tab 3: Credentials (not included in page limit)				

\*Sample outline only covers Tabs 1 and 2 of RFP



# Tips For Writing A Winning Proposal

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# Require a **RED TEAM** Review!!!

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Provides constructive and objective feedback on:

- If RFP requirements are covered
- If proposal themes are effective
- Quality of project management plans
- Effectiveness of writing and graphics
- Whether or not key elements are missing





# Tips for Formatting

- ALWAYS follow the RFP submittal instructions
- Use easy to read fonts for online or hard copy submittals
- Use graphics
- Always include a cover page, table of contents, and tabs
- Don't overuse your company's name throughout your proposal
- Use your client logo in headers or footers
- Use plenty of white space



# The RFP General Instructions

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- See this document on Ion Wave Technologies (you must log in to see it)
- Note the following important instructions:
  - Registration is required!
  - Addenda
  - Submittal instructions
  - Do not email responses
  - Conferences
  - Presentations/Interviews
  - Contract Award
  - Non-responsiveness

# The Base RFP Document

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RFP Number

RFP Title

Contact Person's name and email address

Inquiries

Ethic Requirements

The “No Contact” Rule

List of Exhibits:

A - Project Overview

B - Schedule

C - Scope of Work

D - Evaluation Criteria and Scoring Metrics

E - Reference Sheet

F - Technical Requirements

G - Sample Contract with Insurance Requirements

H – Non-Collusion Affidavit

I – Cost Proposal Form

J – E-Verify Affidavit

K – S.A.V.E. Affidavit

L – Local Vendor Preference Eligibility Affidavit

# Exhibit “A” Project Overview

This is a description of the project.

You may wish to use some of this information when writing your proposal.

## Exhibit “A”

### Project Overview

Simply defined, an Organizational Assessment is a systematic process for obtaining information about the performance of an organization and the factors that affect performance. Performing a formal organizational assessment identifies strengths and weaknesses and requires the participation of key stakeholders. An organizational assessment is also an excellent method to take a figurative step back and evaluate how the organization operates. Forward-thinking organizations understand there are always ways to improve stakeholder, customer, or constituent services and support. When conducting an organizational assessment, businesses and government agencies often identify strengths and weaknesses that lead to improvement opportunities exploiting the previously untapped potential. Also, as a governmental entity, it is also intended to identify both the internal and external factors which can provide for favorable circumstances to achieving our organizational goals.

The City is interested in four types of Organizational Assessments:

**Business Operations** - operations assessments help an organization take an in-depth look into their processes and help to identify areas for improvements. This type of organizational assessment focuses primarily on the processes of an organization.

**Cultural Health** - the cultural health assessment provides indicators of how well the organization’s staff and management systems work together. This type of assessment helps to identify potential shortcomings in the management structure from top to bottom.

**Organization-wide Leadership Capability** – the organization-wide leadership capability assessment helps pinpoint the effectiveness of the leadership team and highlights the untapped potential in individual members of the team.

**Organizational Health** - the organizational health assessment is the most vital as it reviews every aspect of the organization. The typical outputs from organizational health assessments include improved business practices, prioritization of goals, efficient allocation of resources, and restructuring.

In all four types of assessments, once the City’s current state is streamlined, the most critical output is the future state objectives. The objectives establish the blueprint for improving overall organizational performance.

The City expects the following outcomes from an Organizational Assessment:



**Exhibit “B”**

**Schedule**

Time and Date	Event
Wednesday 4 <sup>th</sup> May 2022	Advertisement Date
Tuesday 24 <sup>th</sup> May 2022 @ 11am	Pre-Proposal Conference
No later than 12:00 noon on Friday 27 <sup>th</sup> May, 2022	Question Deadline
No later than 3:30 P.M. Eastern Standard Time on Friday 10 <sup>th</sup> June, 2022	Proposal Due Date

# Exhibit “B” Schedule

## Important Events:

- Advertisement date
- Pre-proposal conference date and time – will indicate whether mandatory
- Question deadline date and time
- Proposal Due Date and Time

# Exhibit “C” – Scope of Work

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RFP #2022-1793  
Organizational Assessment

## Exhibit “C”

### Scope of Work

#### Organizational Assessment: RFP 2022-1793

##### Scope of Work and Deliverables

Given the current COVID-19 public health crisis, the selected vendor must be able to perform the Scope of Work and provide deliverables by utilizing virtual and methodologies. However, at the request of the City, the selected vendor must also have the ability to utilize organizational assessment tools in person at the City’s governmental facilities in completion of the scope of work. To assure community and staff trust and support for organizational improvements, it is essential that this work be performed in a manner that protects the independence, objectivity, and integrity of the process and the work product. At a minimum we expect the Scope of Work to address the following areas, and it is expected that actionable recommendations accompany the findings of the assessment.

##### Phase I: Organizational Structure:

- a. Conduct a detailed examination of the City’s structure, functions, and processes.
- b. Assess the organizational structure and customer service tools as it pertains to ensuring for effective communication with our external stakeholders (i.e., Businesses, citizens governmental agencies, etc.).
- c. Assess organizational structure as it pertains to leadership ability to realize the organizational vision.
- d. Assess functional assignments and staffing levels required to support organizational priorities, review all department’s operational functions and workflow processes for each area.
- e. Assess staff training opportunities as related to individual functions and assess current staff development and recommend an action plan that HR can take to advance career ladders.
- f. Identify all current active strategic planning efforts and review succession and transitional plans for the City’s senior leaders and make recommendations.
- g. Identify current supervisory ratios based on industry best practices and organizational needs, develop recommendations for appropriate supervisory ratios.
- h. Evaluate the City’s and Department’s initiatives, goals, and objectives.
- i. Evaluate staff scheduling. Assess administrative strengths, i.e., supervision and development of staff, risk management, best business practices, and use efficient use of

USE THE SCOPE TO WRITE YOUR PROPOSAL!

1. What is the City looking for?
2. Have you done it before?
3. Do you know of new and innovative ways to deliver the project?
4. Can you provide the deliverables?
5. Do you have questions? Submit them.

# Exhibit “D”

## Evaluation Criteria and Scoring Metrics

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Use the criteria to write your proposal:

1. Previous experience – talk about your wins!
2. Qualifications and experience – include resumes, certifications, and project descriptions.
3. Your approach and plan to meet the RFP requirements – see SOW.
4. References – copy the reference sheet and complete Section 1 for each reference.
5. Local Vendor – don’t leave 5 points on the table!
6. Cost – fair and complete. Do not rely on change orders.



RFP # 2022-1793  
Organizational Assessment

### Exhibit “D”

#### Evaluation Criteria and Scoring Metrics

1. The Evaluation process for the City includes criteria, scoring, and evaluation. The evaluation criteria for this solicitation includes the following:
  - a. Previous experience in performing similar projects. Four (4) similar projects completed within the last five (5) years with two (2) of the four (4) projects delivered to government or quasi-government entities
  - b. Qualifications and experience of the management or other key personnel to be assigned to the contract, including resumes, certifications, and descriptions of experience relevant to the scope of work.
  - c. The approach and plan to meet the RFPs requirements, including a project plan, an organization chart, and a detailed explanation regarding how the deliverables will be completed.
  - d. References will be checked by City personnel. Provide only the information in Section 1 on the Reference Form.
  - e. Local Vendor - Preference To qualify as a local vendor, the Prospective Provider must include a completed, signed, and notarized Local Vendor Preference Eligibility Affidavit.
  - f. Cost - Total points awarded for cost will be determined as follows:

*Lowest Proposed Cost = 10 Points*

*Highest Proposed Cost = 0 Points*

*Other Costs shall receive a percentage of the points between 0 and 10*

# Exhibit “D” cont.

## Point Values

Scoring Metrics - An Evaluation Committee will be responsible for ranking and recommending the most qualified firm(s) using the following criteria and point values on the right.

- ❑ The Evaluation Committee shall be comprised of at least three (3) individuals and no more than five (5) individuals. The Committee shall review the submittals and score using the scoring metrics above. The Evaluation Committee will rank the submittals and determine whether interviews are necessary. The Committee will recommend to the Requesting Department the most qualified firm(s) based on the submittals. The Department will make a recommendation of award to the City Council. The City Council has the authority to make any award that is in the best interest of the City.
- ❑ At the conclusion of evaluation process, the Proposers may be asked to submit in writing, a Best And Final Offer (BAFO). After the BAFO is submitted, the proposals will be rescored as to cost and the decision to award will be based on the final scores including the BAFO.
- ❑ The Selected Provider(s) shall enter into the Professional Service Agreement (“Contract”) that is provided a sample with the solicitation.

<u>Evaluation Criteria</u>	<u>Point Values</u>
Previous experience	0 to 30 Points
Qualifications and experience of personnel	0 to 25 Points
Project approach and plan	0 to 20 Points
References	0 to 10 Points
Local Vendor Preference	0 or 5 Points
Cost	0 to 10 Points
<u>Total Possible Points</u>	100 Points



# Exhibit “E” – Reference Form



## Attachment “E” Reference Form

### Section 1 – To be completed by the Proposing Firm

Name of the Firm Providing a Reference:
Contact Person at the Firm Providing a Reference:
Title of Contact Person:
Telephone number (including extension if applicable):
Email Address:
Name of Project to be Verified:
Approximate Date of Project:

(Do Not Write Below this Line)

### Section 2 – Verification to be completed by Contracts & Procurement Department

Date of Verification:
Name of Person Conducting Verification:
Name of Project Verified:
Date of Project:
Name of the Firm Providing a Reference:
Contact Person at the Firm Providing a Reference:
Title of Contact Person:
Telephone number (including extension if applicable):
Email Address:

### Section 3 – Questionnaire (circle Yes or No)

1. Were you satisfied with the firm's overall performance?	Yes	No
2. Was the Project completed on time?	Yes	No
3. Was the Project completed within the approved budget?	Yes	No
4. If issues were encountered, did the firm handle them courteously, professionally, and timely?	Yes	No
5. Would you hire this firm again?	Yes	No
Additional Comments:		



# Exhibit “F” Submittal Requirements

Not including the Submittal Requirements may cause your proposal to be deemed “Non-Responsive.” Non-responsive proposals are not evaluated.

## Exhibit “F”

### Submittal Requirements

#### Instructions:

1. Complete Provider’s Contact Sheet using the subject: RFP No. 2022-XXXX – RFP TITLE
2. Create a Table of Contents
3. Organize the submittal based on the following seven (7) tabs:

#### Tab 1: Letter of Transmittal shall include: (limit 2 pages)

- a) The Provider’s business organization type (i.e. corporation, LLC, partnership, etc.).
- b) The state of incorporation or organization.
- c) The name and address of the partners and indicate whether each partner is a general partner or limited partner, if applicable.
- d) The parent corporation (name and address), if applicable.
- e) Names and positions of the corporate officers.
- f) Statement as to whether the company is local, regional, national, or international.
- g) The names and addresses of company affiliations and/or subsidiaries.
- h) The address and telephone number of the Primary Office/Headquarters.
- i) The address and telephone number of the office responsible to provide the solicited services.
- j) If different elements of the work/services will be accomplished at different locations, those locations must be listed along with their areas of responsibility.
- k) The letter shall be signed by a representative who is authorized to contractually bind the Responder and shall include the agent’s title or authority.

#### Tab 2: Elements of the Proposal: (limit 20 pages)

- a) Refer to Section 3.0 Submittal Guidelines of the RFP General Instructions.
- b) Previous Experience in Performing Similar Projects:
  - (1) Four (4) similar projects
  - (2) Within the last five (5) years
  - (3) With two of the four projects delivered to government or quasi-governmental entities
- a) Qualification and Experience of Management:
  - (1) Include resumes,
  - (2) Certifications, and
  - (3) Experience relevant to the scope of work in this RFP.
- a) Approach and Plan to Meet the RFP requirements:
  - (1) Include a project plan and
  - (2) Detailed explanation regarding how the deliverables will be completed.

#### Tab 3: Credentials (not included in page limit)

Please provide all credentials/licenses/certifications, as required by the Scope of Work, i.e. general contractor’s license, professional engineering license, law license.

#### Tab 4: Required Forms (not included in page limit):

- a) Current, valid Business License
- b) Business Registration or Annual Registration
- c) Authority to conduct business in the State of Georgia (Foreign Corporations Only)
- d) Certificates of Insurance
- e) Form W-9
- f) Signed Addenda Acknowledgement Forms (if applicable)
- g) Non-Collusive Form (Exhibit “H”)
- h) Cost Proposal Form (Exhibit “I”)
- i) E-Verify Affidavit (Exhibit “J”)
- j) S.A.V.E. Affidavit (Exhibit “K”)

#### Tab 5: Joint Ventures (not included in page limit):

- a) Provide copy of Joint Venture Agreement
- b) Certificate of Insurance in the name of the Joint Venture or the name of the individual joint venture partners

#### Tab 6: Review of Standard Contract (limit 2 pages)

List any terms and conditions that Provider disagrees with and would like to negotiate.

# Exhibit “F” cont. Technical Requirements

Tab 6 – Local Vendor Preference

## **Tab 7: Local Vendor Preference (not included in page limit)**

- a) Pursuant to the City’s Municipal Code Section 4-3324 – Local Vendor Purchasing Preference. A “local vendor” or “local business” means any corporation, partnership, sole proprietorship, franchise, or other business form which:
- b) Has its headquarters, distribution point retail location, locally-owned franchise, or place of business within the territorial limits of the city, where work and business is and has been regularly conducted for at least six (6) months immediately prior to the issuance of the relative solicitation.
- c) Holds all business of professional licenses required by state law, county ordinance, and city ordinance at the location within the city for at least six (6) months immediately prior to the issuance of the relative solicitation.
- d) Complete the Local Vendor form Exhibit “L” and have it notarized.

# Exhibit “G” Sample Contract

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## SAMPLE CONTRACT (SEE HANDOUT)

1. Do not sign – this is a sample
2. Review
3. Create a list of exceptions that you wish to negotiate, if any.
4. Include a sheet in your response:

Exhibit “G” No Exceptions to Sample Contract  
or Exhibit “G” List of Sample Contract  
Exceptions.

## WITH INSURANCE REQUIREMENTS

1. Send to your insurance agent
2. You may include a “sample certificate” which is one that does not list the City of East Point as the insurance holder. If you are awarded the contract, you will obtain an updated certificate.
3. Submit all questions regarding insurance before the question period expires. See Exhibit “B” – Schedule.



# Exhibit “H”

## Non-Collusion Affidavit

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### Exhibit “H” NON-COLLUSION AFFIDAVIT

The undersigned, being duly sworn on oath, says that he or she has not, nor has any other member, representative, or agent of the firm, company, corporation or partnership represented by him, entered into any combination, collusion or agreement with any person relative to the price to be proposed by anyone at such letting nor to prevent any person from proposing nor to include anyone to refrain from proposing, and that this proposal is made without reference to any other proposal and without any agreement, understanding or combination with any other person in reference to such proposal.

The undersigned further says that no person or persons, 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 REFERENCED SOLICITATION ARE TRUE AND CORRECT.**

Name of Organization: \_\_\_\_\_

Name of Person Signing: \_\_\_\_\_

Title of Person Signing: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

#### ACKNOWLEDGEMENT

STATE OF \_\_\_\_\_

COUNTY OF \_\_\_\_\_

Before me, a Notary Public, personally appeared the above named and swore that the statements contained in the foregoing document are true and correct.

Subscribed and sworn to me this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

\_\_\_\_\_  
Notary Public Signature

My Commission Expires: \_\_\_\_\_

Affix Notary Seal



# Exhibit “I”

## Cost Proposal Form

### PAGE 1

**Exhibit “I”**

**Cost Proposal Form (1 of 2 pages)**

Please complete the attached pages of the Cost Proposal Form and return them with this cover page. Note the instructions on how to submit a separate PDF cost proposal document, this document is not to be submitted with your cost proposal document. The cost proposal must be submitted with the Proposer's name, the RFP number and RFP Title. By signing this page, Proposer acknowledges that it has carefully examined and fully understands the Contract, Scope of Work, and other attached documents, and hereby agrees that if the proposal is accepted, it will contract with the City of East Point according to the RFP documents.

Please provide the following information:

Name of Firm: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person Submitting Proposal: \_\_\_\_\_

Title of Contact Person: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

\_\_\_\_\_  
Signature of Contact Person

\_\_\_\_\_  
Printed Name of Contact Person

\_\_\_\_\_  
Title of Contact Person

### PAGE 2

Description of Services	Lump Sum Cost
	\$
Total:	\$

# Exhibit “J” – E-Verify Affidavit

See RFP General Instructions, Section 4.1.1:

“This solicitation is subject to the Georgia Security and Immigration Compliance Act. Pursuant to the Georgia Security and Immigration Compliance Act of 2006, as amended by 2011 House Bill 67, Proposers are hereby notified that all solicitations for services or work that is to be physically performed within the State of Georgia must be accompanied by proof of the Proposer’s registration, the registration of their proposed outside Proposer(s) with the E-Verify Program, as well as attestation to each party’s continuing and future participation in the E-Verify Program as established by the United States Department of Homeland Security.”

## Exhibit "J"

### Contractor E-Verify Affidavit Pursuant to O.C.G.A. § 13-10-91(b)(1)

By executing this affidavit, the undersigned Provider verifies its compliance with O.C.G.A. § 13-10-91, *et seq.* (the "Act") and Chapter 300-10-1 of the Rules of Georgia Department of Labor (the "Rules"), stating affirmatively that the individual, firm or corporation which is engaged in the physical performance of services or has accepted a Contract award on behalf of the City of East Point Georgia (the "City"), (1) has registered with; (2) is authorized to use; (3) is using; and (4) shall continue to use throughout the Contract Period the Federal Work Authorization Program commonly known as E-Verify, or any subsequent replacement program, in accordance with the applicable provisions and deadlines established in the Act and the Rules.

The undersigned Provider further agrees that, should it employ or contract with any Subcontractor(s) in conjunction with the physical performance of services or work required through the acceptance of a Contract award with the City of East Point Georgia of which this affidavit is a part, the undersigned Provider shall secure from such Subcontractor(s) similar verification of compliance with the Act and the Rules through the Subcontractor's execution of the Subcontractor's Affidavit which has been provided by the City.

The undersigned Provider further agrees to provide a copy of each such affidavit to the City of East Point Georgia at the time the Subcontractor(s) is retained to perform such services or work, and to maintain copies of all such affidavits for no less than five (5) years from the date such affidavits were provided to the City and otherwise to maintain records of compliance with the Act and the Rules as required by law.

The Provider hereby attests that its Federal Work Authorization User Identification Number and date of authorization are as follows:

Federal Work Authorization User Identification Number \_\_\_\_\_ Date of Authorization \_\_\_\_\_

Name of Provider: \_\_\_\_\_

Suite/Street Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

City of East Point Solicitation Number and Name of City Project \_\_\_\_\_

I hereby declare under penalty of perjury that the foregoing is true and correct.

Signature of Authorized Officer or Agent \_\_\_\_\_

Printed Name and Title of Authorized Officer or Agent \_\_\_\_\_

Subscribed and sworn before me on this the \_\_\_\_ day of \_\_\_\_\_, 202\_\_.

Notary Public (sign and impress seal) \_\_\_\_\_

My Commission Expires On: \_\_\_\_\_

# Exhibit “K” – S.A.V.E. Affidavit

See RFP General Instructions Section 4.2:

“The City of East Point is required to verify the status of anyone who applies for a Public Benefit through the City. Public Benefits are defined by state statute, O.C.G.A. § 50-36-1, by Federal statute, 8 U.S.C. §1611 and 8 U.S.C. §1621, and by the Office of the Attorney General. Pursuant to these definitions, contract awards by the City of East Point are considered “Public Benefits.” Beginning on January 1<sup>st</sup>, 2012, any person awarded a Public Benefit must show a secure and verifiable document and complete the S.A.V.E. Affidavit. It is, therefore, recommended by the City that the copy of the S.A.V.E. Affidavit be submitted in the RFP response package to avoid any award delays. The Notary Seal on the SAVE Affidavit must be visible on the copy submitted.”

Exhibit "K"	
Contractor's S.A.V.E. Affidavit	
Under the Systematic Alien Verification for Entitlements Program Pursuant to O.C.G.A §50-36-1(e)(2)	
By executing this affidavit under oath, as an applicant for a City of East Point Georgia contract award or other Public Benefit as provided by O.C.G.A. §50-36-1, and determined by the Attorney General of Georgia in accordance therewith, I am hereby stating the following with respect to my application for a City of East Point contract award/ public benefit:	
Name of natural person applying on behalf of individual, business, corporation, partnership, joint venture, or private entity: _____	
Check one:	
<input type="checkbox"/> 1) I am a United States citizen; or	
<input type="checkbox"/> 2) I am a legal permanent resident eighteen (18) years of age or older; or	
<input type="checkbox"/> 3) I am an otherwise qualified alien or non-immigrant under the Federal Immigration and Nationality Act, who is eighteen (18) years of age or older, and lawfully present in the United States of America. All non-citizens MUST provide their Alien Registration Number here: _____	
The undersigned applicant also hereby verifies that he or she has provided at least one (1) secure and verifiable document, as required by O.C.G.A. §50-36-1(e)(1), with this affidavit.	
The secure and verifiable document provided with this affidavit is:	
_____	
In making the above representation under oath, I understand that any person who knowingly and willfully makes a false, fictitious, or fraudulent statement or representation in an affidavit shall be guilty of a violation of O.C.G.A. §16-10-20, and face criminal penalties as allowed by such criminal statute.	
_____	
Signature of Applicant	
_____	
Printed Name of Applicant	
Subscribed and sworn before me on this the ____ day of _____, 202__.	
_____	
Notary Public (sign and impress seal)	
My Commission Expires On:	

# Exhibit “L” – Local Vendor Preference Eligibility Affidavit

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**The Procurement Code of The City of East Point (Ord. No. 1111-95, § 1, 7-3-95) Secs. 4-3324. - Local vendor purchasing preference.**

**(Excerpted)**

(2) *Definition:* A “local vendor” or “local business” means any corporation, partnership, sole proprietorship, franchise, or other business form which:

(a) Has its headquarters, distribution point, retail location, locally-owned franchise, or place of business within the territorial limits of the city, where work and business is and has been regularly conducted for at least six (6) months immediately prior to the issuance of the request for competitive proposals by the city; and

(b) Holds all business or professional licenses required by state law, county ordinance, and city ordinance at the location within the city for at least six (6) months immediately prior to the issuance of the request for competitive proposals by the city.

(3) *Application of local preference to specific procurement activity:* In an effort to nurture small and large businesses, create jobs, boost local economic activity, and tax revenue, the city will grant the lesser of a five-percent or five-point local preference to all otherwise responsive and responsible vendors who have an actual physical presence and direct economic relationship within the city. This provision is applicable only to the city's acquisition of materials, equipment, or services through the request for proposal (RFP) or request for qualification (RFQ) process as provided in code sections [4-3303](#), [4-3307](#), and [4-3313](#).



# Exhibit “L” - Local Vendor Preference Eligibility Affidavit (cont.)

**Exhibit “L”**

**LOCAL VENDOR PREFERENCE ELIGIBILITY AFFIDAVIT**

**The Procurement Code of The City of East Point (Ord. No. 1111-95, § 1, 7-3-95) Secs. 4-3324. - Local vendor purchasing preference:**

(1) *Policy.* The city has a significant interest in encouraging the creation of employment opportunities for its residents and for businesses located within the city. As a purchaser of goods and services, the city will benefit from expanded job and business opportunities for its residents and businesses through additional revenues generated by its activities. It is in the interest of the city and its residents to give preference on eligible local projects to those eligible offerors who have direct physical and economic relationships with the city.

(2) *Definition:* A “local vendor” or “local business” means any corporation, partnership, sole proprietorship, franchise, or other business form which:

(a) Has its headquarters, distribution point, retail location, locally-owned franchise, or place of business within the territorial limits of the city, where work and business is and has been regularly conducted for at least six (6) months immediately prior to the issuance of the request for competitive proposals by the city; and

(b) Holds all business or professional licenses required by state law, county ordinance, and city ordinance at the location within the city for at least six (6) months immediately prior to the issuance of the request for competitive proposals by the city.

(3) *Application of local preference to specific procurement activity:* In an effort to nurture small and large businesses, create jobs, boost local economic activity, and tax revenue, the city will grant the lesser of a five-percent or five-point local preference to all otherwise responsive and responsible vendors who have an actual physical presence and direct economic relationship within the city. This provision is applicable only to the city's acquisition of materials, equipment, or services through the request for proposal (RFP) or request for qualification (RFQ) process as provided in code sections [4-3303](#), [4-3307](#), and [4-3313](#).

(4) *Method of granting local preference:*

(a) Each corporation, partnership, sole proprietorship, franchise, or other business form seeking local preference points under this section shall certify under oath that it is eligible to receive the local preference points as set forth above as a part of the submission of its proposal or bid to the city and, in the event the affidavit or other declaration under oath is determined to be false, such business shall be deemed “non-responsive” and shall not be considered for award of the applicable contract by the manager of contracts and procurement.

(b) Any local vendor who has been determined by the manager of contracts and procurement to be otherwise responsive and responsible, which also provides proof of its local status under oath will receive the lesser of a five-percent or five-point preference on its total evaluated score.

(5) Local preference shall not apply to the following:

(a) Procurement methods other than a request for proposal (RFP) or request for qualification (RFQ) process as provided in [section 4-3303](#), [4-3307](#), and [4-3313](#); or

(b) Procurements for which state or federal law, federal grant provisions, or other funding source prohibits granting a local vendor preference; or

(c) Goods and services provided under a cooperative purchasing agreement or piggyback contracts; or

(d) Emergency, and single or sole source procurement.

RFP #  
RFP Title

**EAST  
POINT  
GEORGIA**

**Please complete the information below:**

Company claiming local vendor preference is a (check one):

☐ Sole Proprietor    ☐ Corporation    ☐ Limited Liability Company    ☐ Partnership    ☐ Joint Venture

☐ Other \_\_\_\_\_

Company Name: \_\_\_\_\_

Primary or H. Q. Address: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, and Zip: \_\_\_\_\_

Number of Years at address above: \_\_\_\_\_

Local Address: Address: \_\_\_\_\_

City, State, and Zip: \_\_\_\_\_

Number of Years at local address: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Email Address: \_\_\_\_\_

Cell Phone Number: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**See Exhibit “F” Technical Requirements and attach the documents requested under Tab 3 (a) – (e) as proof of local address.**

Subscribed and sworn before me on this the \_\_\_\_ day of \_\_\_\_\_, 202\_\_.

\_\_\_\_\_  
Notary Public (sign and impress seal)

My Commission Expires On: \_\_\_\_\_

# RESPONSE CHECKLIST

(For Proponents' use – do not include with your submittal)



RFP No. \_\_\_\_\_ RFP Title: \_\_\_\_\_

	Yes	No	N/A
<b>Due Date</b> by 3:30pm			
<b>Submit</b> using Ionwave System or via email with written permission from C&P			
<b>Acknowledge Addenda</b>			
<b>Contact Sheet</b>			
<b>Table of Contents</b>			
<b>References – how many are required?</b>			
<b>Tab 1</b>			
A – business organization			
B – state of incorporation			
C – name and address of partners			
D – parent corporation			
E – names/positions corp. officers			
F – statement of locality			
G – company affiliations			
H - address/phone primary locale			
I – address of office to perform			
J – different locations			
K - signature			
<b>Tab 2 - Credentials</b>			
<b>Tab 3 – Required Forms</b>			
<b>Tab 4 – Joint Ventures</b>			
<b>Tab 5 – Review of Standard Contract</b>			
<b>Tab 6 – Local Vendor Preference</b>			
<b>Tab 7 – Proposal – 20 pages maximum</b>			

# Questions / Answers / Comments

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THANK YOU  
*for coming!*

## **More questions? Check out these resources:**

The Association of Proposal Management Professionals - [www.apmp.org](http://www.apmp.org) and The Society for Marketing Professional Services - [www.smps.org](http://www.smps.org)

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PURCHASING@EASTPOINTCITY.ORG