



The City of
OKLAHOMA CITY
 OFFICE OF THE CITY MANAGER

MANAGEMENT
BULLETIN

Subject: Guidelines and Procedures for Professional Consultant Selection (Request for Proposals) **Original Date:** Council Approved - May 22, 2001 Revised - September 1, 2015

Bulletin Number: 20-1 **Revised Date:** September 1, 2020

Effective Date: September 1, 2020 **Page:** Purchasing Policies and Procedures Manual Pages 42 - 54 (attached)

Prepared By: Finance Department /Procurement Services Division

Approved By: *C. Freeman* **Date:** September 1, 2020
 City Manager

1. Purpose

On September 1, 2020, the City Council approved an updated version of this policy (Item No. IX.M.). The purpose of this bulletin is to distribute the updated Guidelines and Procedures for Professional Consultant Selection (Request for Proposals) which are incorporated into the City’s Purchasing Policies and Procedures Manual.

2. Scope

This policy is applicable to all professional service contracts as defined in the Guidelines and Procedures for Professional Consultant Selection. These contracts shall be made and entered into pursuant to these procedures and approved by the City Council or respective Trust, as applicable.

3. Policy

The updated policy is attached to this document and is available on the City’s internal website as part of the Purchasing Policies and Procedure Manual.

4. Implementation

It is the responsibility of each Department Head to advise all employees of the updated policy.

5. Summary of Changes

- A. The updated policy will require Council approval two times during the RFP process instead of three times. First, advertisement of the RFP; and second, approval of the final professional services agreement. The RFP Selection Committee will make a recommendation to the Department Head of the requesting Department and the Department Head will authorize the negotiation in writing.
- B. This update to the policy removes the requirement for the issuance of an RFP for hiring Bond Counsel Attorneys. The Department will work with the Municipal Counselor’s Office to select the attorney with the most knowledge and experience in handling municipal bonds with reasonable fees.
- C. Other changes to the policy were minor administrative updates.
- D. The attached policy replaces all previous versions of the policy.

SECTION 12 - GUIDELINES AND PROCEDURES FOR PROFESSIONAL CONSULTANT SELECTION (REQUEST FOR PROPOSALS)

All Professional Service Contracts as defined in these Guidelines and Procedures for Professional Consultant Selection shall be made and entered into pursuant to these procedures and approved or ratified by the City Council or respective Trust, as applicable.

12.1 – DEFINITIONS

For the purposes of these Guidelines and Procedures for Professional Consultant Selection, the following terms and phrases shall have the meaning set forth below.

- A. “City” shall mean The City of Oklahoma City and/or any Trust that has adopted these procedures. As used in these procedures, an approval, ratification, waiver or rejection by the City or Trust shall mean an action of the governing body of such entity.
- B. “City Clerk” shall mean the City Clerk of The City of Oklahoma City, or designee.
- C. “Guidelines and Procedures” or “Procedures” shall mean these Guidelines and Procedures for Professional Consultant Selection.
- D. “City Manager” shall mean the City Manager of The City of Oklahoma City, or designee.
- E. “Consultant” shall mean a person or entity that provides or offers to provide Professional Consultant Services as defined in these Guidelines and Procedures for Professional Consultant Selection.
- F. “Electronic Bidding System” shall mean the electronic bidding application used by the City and/or Trust to advertise and receive all bids, proposals, communications, and responses to solicitations.
- G. “General Manager” shall mean the General Manager of a Trust adopting these procedures, or designee.
- H. “Professional Consultant Services” or “Professional Services” or “Professional Services Contract” shall mean a contract or service that requires the contractor to perform services, or perform services in conjunction with providing associated supplies, parts, and/or equipment, that are technical or professional in nature, that require professional or scientific judgment or other special skills training, taste or discretion, or that are not subject to uniform specifications, either due to the nature of the expertise or the extraordinary need of the contracting entity. Professional Consultant Services are generally procured through a Request for Proposals. Requests for Proposals for these types of services are generally used to obtain the following:
 - 1. an opinion, advice or skill which is not readily available within the department or from any other department;
 - 2. use of specific professional disciplines in an advisory, planning or evaluative capacity;
 - 3. expertise or objective opinion on critical or sensitive issues;
 - 4. benefits of developments in industry, university or foundation research;
 - 5. opinions and/or involvement of experts whose established knowledge and stature may contribute to the success of important projects, goals and objectives;
 - 6. expertise which provides knowledge and skill for projects involving the use of computer technology or other types of technology;
 - 7. performance of tasks or activities of limited duration that do not warrant additional full-time staff;
 - 8. performance of tasks or activities of limited duration that require augmentation of permanent staff;

9. advice or assistance resulting in a report or other deliverable service delineating the alternative courses of action and recommendations based upon the expertise possessed by the Consultant; and/or
 10. such other professional or technical services as determined by the City Council to be necessary or beneficial to the City or its Trusts and authorities.
- I. “Request for Proposals” or “RFP” shall mean an invitation requesting formal proposals for Professional Services for which detailed specifications are impractical and price is not the primary evaluation factor.
 - J. “Request for Qualifications” or “RFQ” shall mean an invitation requesting formal qualifications for Professional Services wherein the respondents are evaluated based primarily on skills and qualifications. An RFQ may be used to short-list firms to those most qualified for a subsequent competitive RFP solicitation or to select the most qualified firm for the work.
 - K. “Requesting Department” shall mean the Department, which initiates the request for Professional Consultant Services, develops the Request for Proposals, and is charged with the responsibility for monitoring the performance of the Consultant and reviews the payment of invoices under the resulting Professional Services Contract.
 - L. “Secretary” shall mean the Secretary of a Trust adopting these procedures, or designee.
 - M. “Trust” shall mean a public trust with The City of Oklahoma City as a beneficiary.

12.2 – ASSESSMENT OF NEED FOR CONSULTANTS

- A. The City Council and/or Trust shall assess and determine the need for Consultants or other Professional Services through approval of the RFP/RFQ and/or authorization to solicit proposals and/or qualifications.
- B. Professional Consultant Services shall not be used to perform any duties determined to be non-delegable.
- C. These Procedures shall not apply to:
 1. Professional Services that are obtained by award of a contract pursuant to competitive bidding;
 2. architectural, engineering and planning services, including licensed architectural, landscape architectural, registered engineering, registered land surveying services, appraisers, and certified planners;
 3. testing laboratory services;
 4. any Professional Consultant Service that is a sole source; i.e., the only known person or entity with a particular skill, knowledge, license, trademark, copyright, or expertise;
 5. City contracts in the amount of less than \$25,000;
 6. Trust contracts for dollar amounts as limited by the respective Trust Indentures or approved by the Trust;
 7. attorneys, and
 8. expert witnesses and consulting experts for litigation.
- D. Except as limited in paragraph C above, these procedures shall apply, but not be limited, to the following Consultants or Professional Services:
 1. accountants;
 2. actuaries;
 3. artists;

4. bond underwriters;
5. financial advisors;
6. healthcare benefits, workers' compensation services providers;
7. independent auditor;
8. information technology and software consultants;
9. insurance brokers and agents;
10. investment broker;
11. legislative consultants;
12. management consultants;
13. marketing services;
14. medical services providers;
15. psychological services providers; and
16. veterinarians.

12.3 – PROCEDURES FOR THE SELECTION OF PROFESSIONAL CONSULTANTS FOR PROFESSIONAL SERVICES CONTRACTS

The Procedures are as follows:

- A. The Requesting Department shall develop the Request for Proposals. The RFP shall include, but is not limited to the following:
 1. General Instructions and Requirements for Proposers document (preloaded in the electronic bidding system);
 2. Oklahoma Open Records Act and Confidential Information document (preloaded in the electronic bidding system);
 3. sample Non-Discrimination Statement (preloaded in the electronic bidding system);
 4. sample Anti/Non-Collusion Affidavit (preloaded in the electronic bidding system);
 5. sample Vendor Registration/W-9 Form (preloaded in the electronic bidding system);
 6. Notice to Proposer (part of the proposal packet);
 7. information regarding any mandatory or non-mandatory pre-proposal conferences;
 8. a statement or description of the specific tasks and/or services to be performed;
 9. the goal or objective to be achieved by the services;
 10. the scope of the services to be provided;
 - a. the scope of the services should be specific enough to provide proposers with sufficient information to prepare an appropriate response to the RFP (“proposal”);
 - b. any deadlines or constraints to be addressed;
 - c. the precise extent, if any, to which City/Trust staff shall participate in the performance of any tasks;
 - d. the function of the Consultant and the need and proposed use of the services; and
 - e. the format of any reporting or documentation of tasks or services.
 11. the ability and capacity of the Proposer; the management structure; and the procedures and practices for management of the engagement;
 12. a description of past performance and references on similar services;
 13. an estimate of the hours and timelines to perform each task or service and to complete all tasks and services;
 14. a statement of billable fees for the services for each member of the proposers team; an estimate of reimbursable expenses; and a not to exceed total for all fees and expenses;
 15. the requirements of the service schedule and the reporting requirements for each service or task and the overall completion of the services;

16. whether any additional or further services may be subsequently determined by the City Council/Trust or the Requesting Department to be requested or required;
17. the time for submission of proposals;
18. where a copy of these procedures may be obtained;
19. the critical issues or services to be addressed in the proposals;
20. a description of the proposal evaluation process, rating scale, and/or selection criteria; and
21. the contract negotiation process and criteria, if any.

B. The Request for Proposals may also include the following:

1. specifications with technical requirements;
2. an example of the proposed or sample contract, if available;
3. a requirement that an executed bond and/or insurance certificate be submitted prior to contract approval by the City Council/Trust;
4. a provision directing proposers to provide the name, resume and background of the managing professional and other key individuals, affiliates, and subcontractors to be associated with the services and may also include the following requirements:
 - a. all named professionals must be available to attend the interview, if granted;
 - b. all professionals attending the interview, if granted, must be on the team providing the proposed services;
 - c. no member of the team may be changed or substituted without the prior written consent of the City Manager/General Manager or designee; and
 - d. should a member of the Professional Service team leave the employ of the Consultant, any substitution must be approved by the City Manager/General Manager or designee.
5. a description of the approach or methodology, if any, the Consultant is expected to use;
6. the Consultant's internal quality control process which must include pre-submission review and approval of each submittal and product by a qualified senior manager of the Consultant who is not assigned to the project team;
7. if travel expenses will be reimbursed to the Consultant or service provider, the RFP must state that such reimbursement will be limited to the City's Travel Policy. The Consultant may not charge an hourly fee for travel time unless performing work under the Professional Service Contract and advancing the project while in transit. Consultant may be required to provide verifiable documentation of such services and time.

Any document or requirement may be waived or amended as a part of the contract approval by the City Council/Trust. However, should a requirement or document be imposed by law (for example a grant or federal requirement) then such requirement or document may only be waived as permitted by law.

- C. Proposals shall be electronically submitted through the electronic bidding system to the City Clerk's Office by 4:00:00 p.m. C.S.T. on the Wednesday specified in the Request for Proposals (unless another day of the week is approved by the City Clerk/Secretary and expressly stated in the Notice to Proposers). Proposals not timely received shall not be considered. This requirement shall be stated in the Notice to Proposer included in the RFP.
- D. The City Manager/General Manager shall submit the RFP and Notice to Proposers to the City Council/Trust for approval. The approval of the RFP shall be routed using the standard agenda item routing procedures.
- E. The City Manager/General Manager shall determine the best method for publishing or advertising the Notice to Proposers.

1. Upon the direction of the City Council/Trust, the City Clerk/Secretary shall publish notice of the Request for Proposals in a newspaper of general circulation. *An example of a Notice to Proposers is attached.*
2. Upon the direction of the City Manager/General Manager, the Requesting Department shall develop a list of potential Proposers/Consultants and shall notify the persons or companies of how to register and submit a proposal through the electronic bidding system. Upon the determination and direction of the City Manager/General Manager, the Requesting Department shall publish notice of the Request for Proposals in other applicable “trade” newspapers, publications, etc. *An example of a Notice to Proposers is attached.*

12.4 – REQUEST FOR QUALIFICATIONS

The City and/or its Trusts may adopt and utilize, when necessary or in its best interest, as part of a Professional Consultant Selection Procedure or as an initial step preceding a Professional Consultant Selection Procedure, a Request for Qualification (RFQ) procedure to prequalify or short list proposers. An example of an RFQ is for the selection of artists.

12.5 – REVIEW OF PROPOSALS BY SELECTION COMMITTEE

- A. Proposals timely received through the electronic bidding system shall be downloaded by the Requesting Department. The Selection Committee shall review the Proposals and determine compliance with the requirements of the RFP. The City Council/Trust, however, reserves the rights set forth in Section 12.10 (Reservation of rights) below.
- B. Unless otherwise directed by the City Council/Trust, the Selection Committee used by the City/Trust shall be composed of:
 1. the City Manager (or designee);
 2. the Finance Director (or designee);
 3. the Department Head of the Requesting Department (or designee);
 4. the Information Technology Director (or designee), if the RFP is related to software or technology; and
 5. the City Manager may authorize at least one other member, which may or may not be a City employee or official.

Public Trusts may follow different procedures by having a separate policy approved by the Trust or by having the Trust General Manager recommend a Selection Committee at the time the RFP/RFQ is presented to the Trust for consideration. Trusts will include a representative of City departments that may be impacted by projects for which Professional Services are being solicited.

- C. The duties of the Selection Committee shall be as follows:
 1. The Selection Committee shall review and consider all timely submitted electronic proposals. The Selection Committee may investigate and verify any or all the statements and/or representations in any or all proposals as it may deem necessary or prudent.
 2. The Selection Committee shall use the evaluation form and rating scale developed by the Requesting Department, if any. If none, the Selection Committee shall develop its own evaluation form and rating scale. *(An example of an evaluation form and rating scale are attached.)*
 3. The Selection Committee may make its selection based on the written proposals and any additional or clarifying documents submitted by the proposer at the request of the City/Trust, or it may, in its

discretion, conduct oral interviews. The Selection Committee may, in its discretion, select all or a portion of the proposers for oral interviews. The oral interviews may include:

- a. a brief presentation by the proposer providing an overview of the proposal and the proposer's approach to the services and tasks;
- b. a product demonstration for software and other technical services;
- c. inquiries by the Selection Committee as to any part of the proposal and any information, clarification or verification the Selection Committee may need for its evaluation;
- d. discussion of any foreseeable or unusual problems, requirements, or concerns; and/or
- e. discussion of any of proposer's concerns regarding the execution of any document requested or provided by example in the RFP.

As a part of the interview, the Selection Committee may request and/or the proposer may provide any additional information considered necessary to the evaluation of the proposal. Interviews shall be documented and any statements and/or representations made by the Proposer during the interview will be incorporated into the Professional Services Contract. Consultant will be bound to any statements and/or representations made during the interview.

4. After review and consideration of the Proposals and Proposers, the Selection Committee shall rank all Proposals based on the criteria established pursuant to subsection 2 above.
5. The Department Head of the Requesting Department may direct appropriate representatives in writing to negotiate with the proposer(s) selected by the Selection Committee. If the representatives are unable to negotiate a contract resulting in a recommendation for approval to the City Council/Trust with the selected proposer, the Department Head may give additional direction to negotiate with other or additional proposers.

D. The Selection Committee shall use evaluation criteria to select the proposal best meeting the needs of the City or Trust:

1. The following criteria are examples that may be used:
 - a. **Overall understanding of the services to be provided:** Does the proposer appear to have a firm comprehension of the requested services and the critical nature of the services? Do they demonstrate a clear understanding of the unique skill or specialized expertise the solicitation document defines? Consider if the detail of the Proposal Content Requirement has been provided and if the overall Proposal is specific to the City's/Trust's needs.
 - b. **Scope of Services:** Does the Proposer appear to have accepted primary responsibility for providing administrative, professional, and/or technical resources for the services? Consider the anticipated degree of City/Trust involvement, staff requirements dedicated to the service and ongoing staff support to the proposer and the service. Shall the Proposer provide reporting and payments as required or requested?
 - c. **Experience providing similar services:** Does the proposer's history reflect experience providing similar services, consistent with the needs of the City/Trust? Consider the number of contracts awarded performing comparable work; and the type of organizations served (i.e. public, private, for-profit, non-profit).
 - d. **Qualifications of Staff Assigned:** Does the designated Proposal staff possess sufficient skills, knowledge, and abilities to meet the full requirements of the job? Consider relevant education and study; licenses and certificates; and years of relevant experience.
 - e. **Service Levels:** Does the Proposal respond to questions and requirements in sufficient detail to address City/Trust concerns? Do responses indicate satisfactory levels of service?

- f. **Projected Implementation Start & Completion:** Does the proposer provide sufficient information to determine the timing for completion of each phase of the implementation and provide a projected start and completion date?
- g. **Other Information:** Other factors or information determined by the Selection Committee to be pertinent and given weight in the selection process.
- h. **Fee Schedule and Expenses:** Do Fee Schedules reflect sufficient detail to determine total project cost? Do Fee Schedules provide detail and account for other costs and expenses such as travel, reports or special services? Is Consultant charging hourly fee during travel time? Are expense reimbursements limited to the City's Travel Policy? Is the pricing competitive for the quality of services being offered? Is the pricing within the budget for this contract? Did the Consultant provide a not to exceed cost?

- 2. The above criteria are provided only as examples. Each Request for Proposal for Professional Consultant Services may have unique criteria specific to the requested services. Criteria should be weighted with the most important factors holding the most weight in the evaluation process.
- 3. Pricing may not be the most important factor when using these Procedures; however, price should always be a consideration when making any City/Trust contract. When evaluating proposals, the return on investment of a Professional Services Contract should always be considered.
- 4. An example of an evaluation form is attached to these Procedures.

E. Best and Final Offer

The City and/or its Trusts may, when necessary, or in its best interest as part of a Professional Consultant selection process, request for some or all proposers to provide a best and final offer.

12.6 – WRITTEN CONTRACT FOR PROFESSIONAL CONSULTANT SERVICES

- A. Each Professional Service Contract shall be evidenced by a fully executed written contract. The written contract may contain or incorporate the following:
 - 1. standard clauses;
 - 2. anti/non-collusion affidavit;
 - 3. certificate of non-discrimination;
 - 4. business relationship affidavit;
 - 5. a performance bond or guarantee;
 - 6. a requirement for insurance naming the City/Trust as additional insured and evidenced by a certificate of insurance on a form acceptable to the City Manager/General Manager;
 - 7. a requirement to keep records and a right to audit;
 - 8. a description of claim payment procedures and a requirement to create and keep necessary records to support such claims;
 - 9. a description of the scope and nature of services;
 - 10. a description of the responsibilities of all parties;
 - 11. a statement making all working papers, reports, documentation, and products the property of the City/Trust;
 - 12. timelines and deadlines for completion of tasks and services;
 - 13. type, content and frequency of reports and products to be submitted;
 - 14. method, schedule and total amount of fees and payments, which may include progress payments related to specific tasks or services;
 - 15. procedures for resolving disputes (the resolution of such disputes shall be governed by Oklahoma law and any action shall be brought in a court of competent jurisdiction, state or federal, located in Oklahoma County, Oklahoma);

16. procedures for amending or terminating the contract or any task or services therein;
 17. a requirement that all authorizations and approvals have been or shall be obtained from the holders of patents, trademarks, copyrights, licenses or other rights;
 18. a requirement for indemnification and legal representation of the City, its Trusts, officers, agents, and employees for acts and omissions of the Consultant;
 19. a clause for inclusion by reference of the RFP, the proposal, and the representations of the proposer into contract and a statement of the order of precedence should the terms, provisions or conditions thereof conflict; and
 20. a right of the City/Trust to terminate the contract upon notice with or without cause.
- B. The Requesting Department shall keep the Municipal Counselor's Office apprised of contract negotiations. All contracts shall be submitted to the Municipal Counselor's Office for review and approval prior to submission to the City Council/Trust for approval or ratification. Upon completion of negotiations, execution of the contract, and receipt of required documents by the proposer, the City Manager/General Manager may docket the proposed contract for consideration by the City Council/Trust.
- C. Some projects may be developed or completed in phases (for example survey, study, and report). If a Consultant is selected for a project and the City/Trust decides to pursue additional tasks and/or services related to the project with the same Consultant, the selection process need not be repeated. The City Council/Trust may authorize the same Consultant to pursue additional related tasks and/or services, by amending the contract to provide for the additional Professional Consultant tasks and/or services.

12.7 – CONTRACT MONITORING

- A. The Department Head of the Requesting Department or General Manager of the Trust shall assign a staff member(s) to oversee and monitor each contract to ensure the Consultant performs all tasks and services and to ensure that the City/Trust derives maximum benefit from the contract and contracted services.
- B. The Department Head of the Requesting Department or General Manager of the Trust, or designee, must ensure all invoices are signed and/or electronically approved by two staff members who have reasonable knowledge of the Professional Services Contract and the project. The staff members must either be involved in approving the purchase or verifying receipt of the purchase to ensure reasonably adequate controls over payment approvals.
- C. For auditing purposes, Departments or Trusts approving the claim for payment must be able to provide documentation that both staff members had sufficient knowledge of the Professional Services, the Professional Services Contract, and the project to perform the corroborating invoice review and that the department was in agreement that the services were provided and the invoice(s) should be paid.
- D. Upon submitting the Professional Services Contract to Procurement Services for entry into the financial system, Departments must provide documentation of the Department's compliance with this policy for review of all invoices requiring two staff members who have reasonable knowledge of the purchase transaction. **In lieu of two staff members, the Department Director or General Manager of the Trust may designate one of the reviewers to be a private party with unique expertise employed by the City or Trust with responsibility to perform particular technical review and provide advice to the City/Trust concerning compliance with requirements.**
- E. Throughout the term of the contract, the Requesting Department shall evaluate the performance of the Consultant and report Consultant's: findings and recommendations; strengths and weaknesses of services and approach; contract costs; time expenditures; task and service progress and completion; scheduling and deadline compliance or non compliance; and the preliminary and final findings and recommendations.

12.8 – DOCUMENTATION OF THE SELECTION PROCESS

- A. The City Clerk/Secretary shall maintain one electronic copy of the following documents in accordance with the City's Records Retention Policy and/or any applicable Oklahoma law:
1. the Request for Proposals, as approved;
 2. any publication notice of the Request for Proposals;
 3. each timely received Proposal;
 4. each agenda item; and
 5. a true and correct copy of the executed contract.
- B. The Requesting Department designee shall maintain one copy of the following documents for the period required by Oklahoma law:
1. the final evaluation form and rating scale completed by the Requesting Department designee; and
 2. Consultant performance evaluations and progress reports.

12.9 – APPEAL PROCEDURES

If a proposer in a Request for Proposal selection process believes these Guidelines and Procedures for Professional Consultant Selection were not followed, it is recommended that the Proposer first contact the Department or Division Supervisor or General Manager of the Trust responsible for supervision of the Professional Services Contract. This should be done as soon as the Proposer perceives there is an issue. If the Proposer is not satisfied with the response received from one of the above, the Proposer may make a formal appeal using the steps set forth below. Scoring by the Selection Committee shall not be a basis for appeal.

Step 1. The Proposer may submit any complaint in writing specifically identifying the area of complaint and containing any supporting data or other pertinent information substantiating the complaint within five (5) working days of the occurrence. The complaint shall be e-mailed to cityclerk@okc.gov and the City Clerk/Secretary shall then forward the complaint to the City Purchasing Agent. The Purchasing Agent will investigate the complaint and review findings with the necessary staff representatives. The Purchasing Agent will then reply to the proposer in writing within five (5) working days of the date the appeal is received.

Step 2. If the Proposer is not satisfied with the Purchasing Agent's written reply, an appeal may be made in writing within five (5) working days to the Finance Director. The Finance Director, or designee, will ascertain all facts within twenty (20) working days after receiving notice of the appeal to the Finance Director. The Finance Director may hold a hearing and invite witnesses if deemed necessary. The Finance Director will provide findings and a decision within ten (10) working days following the date of the hearing.

Step 3. If the proposer is still not satisfied with the Finance Director's reply, the proposer can appeal to the City Manager/General Manager within five (5) working days following receipt of the Finance Director's reply. There are no other steps in the appeal process.

12.10 – RESERVATION OF RIGHTS

The City/Trust reserves the right to waive formalities, irregularities and defects in any and/or all Proposals, except as otherwise required by law. The City/Trust reserves the right to: reject any or all Proposals; to reject a portion of any or all Proposals; to negotiate and execute a contract or to not negotiate or execute a contract with any Proposer; and to solicit new or different Proposals. The City/Trust reserves the right to negotiate and/or contract with one or more Proposers for all or a portion of any Proposal or proposed services.

Each RFP for Professional Services may have unique criteria specific to the requested services. Criteria should be weighted with the most important factors holding the most weight in the evaluation process. This form is only provided as an example.

CITY OF OKLAHOMA CITY
Request for Proposal
EVALUATION CRITERIA

Proposer: _____ Committee Member: _____

Proposal Evaluation Factors

1. **Overall understanding of the services to be provided:** Does the Proposer appear to have a firm comprehension of the requested services and the critical nature of the services? Do they demonstrate a clear understanding of the unique skill or specialized expertise the solicitation document defines? Consider if the detail of the Proposal Content Requirement has been provided and if the overall proposal is specific to the City's needs.

_____ Factor Rating

Comments: _____

2. **Scope of Services:** Does the Proposer appear to have accepted primary responsibility for providing administrative, professional, and/or technical resources for the services? Consider the anticipated degree of City/Trust involvement, staff requirements dedicated to the service and ongoing staff support to the proposer and the service. Shall the Proposer provide reporting and payments as required or requested?

_____ Factor Rating

Comments: _____

3. **Experience providing similar services:** Does the Proposer's history reflect experience providing similar services, consistent with the needs of the City/Trust? Consider the number of contracts awarded performing comparable work; and the type of organizations served (i.e. public, private, for-profit, non-profit).

_____ Factor Rating

Comments: _____

4. **Qualifications of Staff Assigned:** Does the designated Proposal staff possess sufficient skills, knowledge, and abilities to meet the full requirements of the job? Consider relevant education and study; licenses and certificates; and years of relevant experience.

_____ Factor Rating

Comments: _____

5. **Service Levels:** Does the Proposal respond to questions and requirements in sufficient detail to address City/Trust concerns? Do responses indicate satisfactory levels of service?

_____ Factor Rating

Comments: _____

6. **Projected Implementation Start & Completion:** Does the Proposer provide sufficient information to determine the timing for completion of each phase of the implementation and provide a projected start and completion date?

_____ Factor Rating

Comments: _____

7. **Other Information:** Other factors or information determined by the Selection Committee to be pertinent and given weight in the selection process.

_____ Factor Rating

Comments: _____

8. **Fee Schedule and Expenses:** Do Fee Schedules reflect sufficient detail to determine total project cost? Do Fee Schedules provide detail and account for other costs and expenses such as travel, reports or special services? Is Consultant charging hourly fee during travel time? Is the pricing competitive for the quality of services being offered? Is the pricing within the budget for this contract? Did the Consultant provide a not to exceed cost?

_____ Factor Rating

Comments: _____

**CITY OF OKLAHOMA CITY
Request for Proposal
EVALUATION FORM AND RATING SCALE**

Proposer: _____ Committee Member: _____

OVERALL RATING

Factor 1 _____ X _____ %= _____

Factor 2 _____ X _____ %= _____

Factor 3 _____ X _____ %= _____

Factor 4 _____ X _____ %= _____

Factor 5 _____ X _____ %= _____

Factor 6 _____ X _____ %= _____

Factor 7 _____ X _____ %= _____

Factor 8 _____ X _____ %= _____

TOTAL: _____

Attachment “B” – Notice To Proposer

(Published in the Journal Record _____)

NOTICE TO PROPOSERS

Notice is hereby given that The City of Oklahoma City/Trust will receive electronic proposals at the **OFFICE OF THE CITY CLERK, 200 North Walker Avenue, Oklahoma City, Oklahoma 73102** until 4:00:00 p.m., on the _____ day of _____, 2020, for the following:

REQUEST FOR PROPOSALS (RFP?????) – Description of Proposal
*****Contact Purchasing Agent for RFP Number Assignment*****

The City of Oklahoma City and its Trusts have partnered with BidSync, Inc. to accept proposals electronically. You are invited to submit a proposal electronically through the BidSync system to supply the professional services, products, or systems specified in the electronic proposal packet. The City and its Trusts do not provide access to a computer to prepare electronic proposals or electronic proposal submission. Proposers must register with BidSync at <https://www.bidsync.com/the-city-of-oklahoma-city> in order to submit an electronic proposal. The City and its Trusts recommend potential proposers register and become familiar with the BidSync electronic proposal process in advance of submitting a proposal. There is no charge to the proposer for registering or submitting an electronic proposal to the Contracting Entity through BidSync. Instructions on how to get registered to propose through BidSync can be found on The City of Oklahoma City’s website at <https://www.okc.gov/departments/bidding>.

A copy of the Guidelines and Procedures for Professional Consultant Selection may be obtained from the Office of the City Clerk at the above referenced address. Proposals shall be made in accordance with the Notice to Proposers, General Instructions and Requirements for Proposers, Oklahoma Open Records Act and Confidential Information, and the RFP proposal packet, which are a part of the complete electronic proposal packet. A sample Non-Discrimination, Anti/Non-Collusion Affidavit and Vendor Registration form is attached for the Proposer’s reference and will be completed prior to contract approval. By submitting a proposal for services, the Proposer certifies that they, and any proposed subcontractors, are in compliance with 25 O.S. §1313 and participate in the status Verification System. The Status Verification System is defined in 25 O.S. §1312 and includes but is not limited to the free Employment Verification Program (E-Verify) through the Department of Homeland Security and available at www.dhs.gov/E-Verify.

The City and its Trusts reserve the right to waive formalities, irregularities and defects in any or all proposals, except as otherwise required by law. The City and its Trusts reserve the right to: reject any or all proposals; to reject a portion of any or all proposals; to negotiate and execute or to not negotiate or execute a Professional Services Contract with any proposer; and to solicit new or different proposals. The City and its Trusts reserve the right to negotiate and/or contract with one or more proposers for all or a portion of any proposal or proposed services.

Proposals timely received electronically through BidSync in the City Clerk's Office shall be forwarded to the Requesting Department for the Selection Committee to open and review. The BidSync system does not allow proposals to be submitted after the 4:00:00 p.m. deadline, on the above mentioned date. There will be no exceptions to this policy.