How to Write a Compliant Solicitation Response

Julie Marie Irvin
President & Founder







julie@keystoneresources.com



fb.com/keystoneresources



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Text KEYSTONE to 66866

Design, Digital & Proposal Agency



























Discovery

Strategy

Design

Develop

Content

Print

Launch

Delivery

Presentation

Maintenance

YOUR BOTTOM LINE AGENCY

Houston-based, woman-founded, 14 employees

Interagency Mentor/Protégé 2016 Graduate

Goldman Sachs 10,00 Small Business Graduate – Cohort 1

87% Win Rate

Certified Proposal Mangers – 15+ years of Proposal and Presentation Management Experience

University of Houston – HUB Protégé

Recent Submissions for clients to:

Texas A&M

Houston Community College

Fort Bend ISD

Texas Department of Criminal Justice

Tulsa Development Authority

Recent Contract Awards:

City of Tulsa

City of Houston – Pole Banner Program – \$ 1.7 M

Houston Business Journal's: Fast 100, Top Advertising Agency, Top Graphic Design Firm, Top & Fastest Woman Owned

Culture Awards: Best & Brightest Companies to Work For (Houston & National), HBJ Best Places to Work





EDI Building Consultants

Capabilities Statement

Providing Effective Solutions for Asset Preservation

Value Proposition

EDI Building Consultants is a multi-disciplined remedial consulting firm built on a passion for building construction and the desire to be the best in the field of building enclosure consulting.

Our employees are engineers, architects and construction specialists who value knowledge, learning, and service. We strive to live our personal and professional lives with thoughtfulness, accountability, and dedication so that we can touch the lives of our stakeholders in positive and meaningful ways.

We are blessed with opportunity to work on interesting, meaningful, and engaging projects every day that allow us to solve complex building performance problems through the proficient application of engineering knowledge and expertise and deliver cost effective solutions to our clients.

Areas of Expertise

- + Building Enclosure Design: Waterproofing, Curtain Wall and Roofing Design
- + Forensic Engineering
- + Structural Design

Industries Served

- + Commercial
- + Industrial

+ Oklahoma

+ Tennessee

+ Texas

+ Ohio

- + Construction Monitoring and **Contract Administration**
- + Field Testing
- + Implosion Surveys
- + Disaster Response
- Government + Multi-Family
 - + Hines

- + Pennsylvania
- + Michigan

+ Utah

Insurance Coverage Provided:

Registered Professional Engineers

- + \$5 Million General Liability
- + \$1 Million Errors & Omission
- Federal Tax ID # 26-1561331

NAICS Codes

- 236210, 236220, 237990, 238110, 238120, 238140, 238150, 238160, + \$2 Million Worker's Comp.
 - 238190, 541310, 541330, 541340
 - Cage Code 5VQH6

DUNS # 82-677-4429

Corporate Headquarters

+ 1717 Montrose Blvd Houston, Texas 77006 (713) 772-6300 www.edibc.com

Northeast Office

+ 6300 Rockside Road, Suite 302 Cleveland, Ohio 44131 (216) 328-8254 www.edibc.com

Date Established

+ 2008

Geographical Reach

+ Nationwide

Key Management Team

- + Philip Sumang, P.E. psumang@edibc.com
- + Matt Hoffman, P.E. mhoffman@edibc.com

Clients

- + Transwestern
- + Brookfield Properties
- + Rice University
- + Invesco Real Estate
- + Rosemont Realty

713-270-3394

References

- Brookfield Properties Wayne Harner, Vice President wayne.harner @brookfieldproperties.com 713-651-1515
- + Transwestern Jerry Allen, Director of Engineering jerry.allen@transwestern.com 713-270-7700 Brett Williams, Vice President brett.williams@transwestern.com
- Rice University -Joe Buchanan, Senior Project Manager jwbuch@rice.edu 713-348-6373







ORR TEXTILE CO. INC.

MANAGEMENT

CEO-Cindy Orr

FEDERAL TAX ID

74-1589600

CAGE CODE

04BU3

423220

423840

2392

2299

BANK

JP Morgan Chase

SIC CODE

President - Lawson Orr

Sales Manager—Philip Francis

PRIMARY NAICS CODES

VP Sales & Marketing-Hilary Orr Francis

Hilary Orr Francis 4777 Blalock, Houston, Texas 77041 P: 713.939.7788 | F: 713.939.7714 Hilary@orrtextile.com orrtextile.com

PRODUCT LIST

- Towels (Utility, Terry, Shop)
- Napery
- Aprons Dust Control
- Sheets & Pillowcases
- Laundry

Uniforms

Blankets

VERTICAL MANUFACTURING

Fiber

Weaving

Spinning

Dying

Yarn

Finishing

GEOGRAPHIC REACH

Reach-Local, State, National, and International Headquarters - Houston, Texas

MILL LOCATIONS



CERTIFICATIONS & ACCREDITATIONS

WBE Certification - 2005 I 10860





Linen Supply



Hospitality



Government







Airlines



Healthcare





Capabilities Statement

Value Proposition

The delivery of competent and proficient service depends on a strong partnership one built on trust, respect, reliability, open communication, and flexibility, ARCHI*TECHNICS/3, INC. (AT/3) was founded with the belief that the client is an integral partner in the design process. AT/3 has the staff, creativity, experience, and expertise necessary to help our clients develop distinctive new facilities or to renovate, repurpose, restore and modernize existing facilities. AT/3 is a wholly minority owned small business enterprise and has considerable experience with planning and managing the architectural and engineering project delivery process. Whether it is new construction, expansion, or adaptive re-use, AT/3 strives to impart the same attention to detail, creativity and commitment to each and every project.

AWARDS & ACCOLADES

PROJECT	AWARD
Conroe Center, Lone Star College System	American School & University Outstanding Design, Post Secondary, 2011
University of Houston at Sugar Land /	Outstanding Design - American School and
Wharton Junior College Academic Building	University, Architectural Portfolio, 2009
University of Houston at Sugar Land,	American School & University Outstanding
Brazos Hall, University of Houston System	Design, Post Secondary, 2009
Shadydale Elementary School,	American School & University Outstanding
North Forest ISD	Buildings – Elementary School, 2001
East Houston Intermediate School,	American School & University
North Forest ISD	Outstanding Buildings 2001

CLIENTS

- Houston Independent School District
- » North Forest Independent School District »
- » Dallas Independent School District
- Alief Independent School District
- Mobile County Independent School District
- Aldine Independent School District
- » Prairie View A&M University
- University of Houston
- Texas Southern University
- Lamar University @ Orange
- North Harris Montgomery
- Community College
- Houston Community College
- Diocese of Galveston Houston
- Triangle Ministries
- Diocese of Dallas

INDUSTRIES SERVED

- Municipal Government
- County Government
- State Government
- Federal Government
- Non-Profit
- Worship
- » Oil and Gas

- Riverside General Hospital District
- Harris County Hospital District » City of Houston (Housing Authority, Health and Human Services, Police
- Department, Solid Waste Department) » City of Mobile (Police Department.
- Housing Board)
- Harris County
- » Texas Department of Public Safety
- » Texas National Guard Armory
- » NASA / Johnson Space Center
- » Exxon, USA
- » Majic Johnson Theaters
- » Southwestern Bell Corp.
- » Midtown Redevelopment Authority
- » Ft. Bend County
- » Entertainment
- » Justice
- » Judicial » K-12 Education
- » Higher Education
- » Medical

AREAS OF EXPERTISE

- Architectural Services
- » Construction Management
- » Program Management
- » Urban Design
- » Interior Design

CERTIFICATIONS

- State of Texas Historically Underutilized Business #1760381237500City of Houston - Minority Business Enterprise #13-11-1796
- City of Houston Minority Business Enterprise #13-11-1796
- City of Houston Disadvantaged Business Enterprise #13-11-1796
- METRO Small Business Enterprise #6106041033
- » Hire Houston First

DATE ESTABLISHED: JUNE 1992

INSURANCE COVERAGE PROVIDED

General Liability - \$1 million Professional Liability - \$5 million Worker's Comp - \$1 million

REFERENCES

- Meredith Smith
- Houston Independent School District 713-746-8256 msmith6@houstonisd.org
- Grea Williams
- Texas Southern University 713-313-1962
- williamg@tsu.edu Katherine Miller
- University of Houston 713-743-5582 kmiller17@uh.edu
- Jim Rice
- Rice & Gardner 713-482-2305
- Jim.rice@ricegardner.com
- Patrick Mouton
- Aldine Independent School District 281-985-6373
- pmouton@aldine.k12.tx.us
- Other References Available Upon Request

CONTACT

Christus N. Powell, Jr. AIA, NCARB, NOMA

Owner & Principal 713-868-0088 secretary@architech3.com 16115 Bowie Ridge LN

Houston, TX 77245 Ettienne Zak

Business Development 713-702-1100 ettiennezak@gmail.com



Do you have vegetation, brush or trees that need management?

TUF INDUSTRIAL FMPI MYS THE RIGHT EQUIPMENT AND THE RIGHT PEOPLE TO COMPLETE YOUR PROJECT ON TIME AND WITHIN BUDGET.

OUR CORE BUSINESS LINES

- Mechanical vegetation removal
- General vegetation management on industrial sites
- Herbicide control of unwanted species
- Tree maintenance and removal

PAST PERFORMANCE

- RIVERSTONE DEVELOPMENT Land Clearing and Selective Thinning for Tree Preservation
- BRITISH PETROLEUM Identification and Removal of Hazard Trees Maintenance Pruning
- MILLIS DEVELOPMENT Selective Thinning for Construction and Preservation of Trees
- FIRST COLONY COMMUNITY ASSOCIATION. Selective Tree Removal Project

SELECTED CLIENTS

- British Petroleum
- Chevron Philips
- First Colony Community Association

- . The City of Sugar Land
- Enterprise Products
- Genesis Pipeline

INDUSTRIES SERVED

- Government
- Commercial Real Estate
- Multi Family Housing
- Electrical RoW

- HoA
- Landscape
- Petrochemical PnW

GEOGRAPHIC COVERAGE

Tevas

CERTIFICATIONS

SBA Certified Small Business

DATE ESTABLISHED

2010

INSURANCE COVERAGE

GENERAL LIABILITY

\$1,000,000

WORKERS COMPENSATION

\$1.000.000

AUTOMOBILE LIABILITY

\$1,000,000

UMBRELLA LIABILITY

\$5,000,000

INLAND MARINE

\$210.000

ANNUAL SALES VOLUME

2014 - \$3,109,297

2013 - \$2,593,000

2012 - \$1,463,000

Primary NAICS Code 561730

Federal Tax ID 27-3435238

DUNS # 051179555 Cage Code 743K5

KEY MANAGEMENT

TEAM CONTACT

GRANT C. CROWELL

832-731-6231 grant@theurbanforesters.com

REFERENCES

SCOTT BUIDLESON

B-N-B Servoies

832.435.2954 sburleson@yahoo.com

JOSH WAILES OPERATIONS MANAGER

First Colony

Community Association

281.634.9595

jwailes@firstcolony.org

JOHN KELLY

LANDSCAPE MANAGEMENT DIRECTOR Terra Management Services

281.830.7244

johnk@terramgmtsvcs.com

- Easy to read
- Organized well
- Professional
- Value Proposition
- NAICS Codes / DUNS #
- Services you offer How you are different
- Certifications
- Insurance
- References
- Contact Information



VALUE PROPOSITION

Keystone Resources provides responsive, boutique service with measurable, imaginative, and results-driven solutions. We find the solutions to your creative challenges through extensive research and collaboration on your desired goals. This model has proven to be effective and Keystone Resources has been the recipient of various national and international awards and accolades throughout its ten years.

- » Client-driven and results-driven marketing, design and proposal solutions
- » Provide imaginative solutions and designs, translated and presented in a clear and
- » Provide creative solutions for your creative challenges

- » Complete in-house creative team available including web director and creative designers
- » In-house team combines proposal professionals, design artist, and interactive web developers to create compliant, responsive, and engaging products
- » We are dedicated to maintaining and nurturing our relationships More than 75% of our business comes from repeat clients

» Keystone Resources will respond to any need within 24-hours

2016 - 2012 - Houston's Best and Brightest Companies to Work For

2015 - 2011 — Houston Business Journal Top Graphic Design Firms

2015 - 2012 — Houston Business Journal Top Advertising Agencies

2013 - 2009 - Top 500 Supplier by DiversityBusiness.com

2012, 2011, 2010 - WBE Advocate of the Year (Julie Marie Irvin)

2012, 2011, 2010 - WBEA Supplier of the Year, Under \$1 Million

University of Houston | Diane Burkett, Director of Marketing

(713) 743-7698 | Dburkett@central.uh.edu

713-783-9225 | jmiller@iremhouston.org

- » Quotes are available within 48-hours
- » Your call will always be returned by the most knowledgeable source for your request

2015, 2014, 2010 — Houston Business Journal's Top 50 Fastest-Growing Woman-Owned Businesses

2016 — AMA Crystal Awards – B2C-Agency, UH Continuing and Professional Studies

2014, 2012, 2011 - NAWBO Finalist Houston Woman Business Owner of the Year

2012, 2011 — International Association of Business Communicators (IABC) Awards

2012, 2011 — The International Academy of the Visual Arts - Communicator Awards

2011, 2010 — The International Academy of the Visual Arts - Communicator Awards

Institute of Real Estate Management - Houston Chapter | Jo D. Miller, Executive Director

CERTIFICATIONS

Photography

Interactive

» WBENC Certificate # 2005113360

Interior, Exterior, Site, & Headshots

AREAS OF EXPERTISE

Custom Logo Design, Brand Guidelines, Stationery Systems, Marketing Collateral,

Annual Reports & Long Documents

Website Development & Maintenance,

Proposals & Presentations

Mobile Site Design & Development, Social Media

Proposal Management, Development & Design, Electronic Presentations (e-Books & Powerpoints)

Branding, Newsletters & Digital Campaigns

- » EDWOSB & WOSB Certified by the SBA
- » HUB Certified by TX Comptroller's Office VID # 1651165363200
- City of Houston Woman/Disadvantaged Business Enterprise (W/DBE) #11-07-11780
- » SBE Certified by Port of Houston Authority
- » SBE Certified by METRO » Hire Houston First

GEOGRAPHIC REACH

- » Reach: Local, State, National and International
- » Location: Historic Houston Heights, Texas

DATE ESTABLISHED — 2002

INSURANCE COVERAGE PROVIDED

- » General Liability \$1 Million
- » Worker's Comp \$1 Million
- » Professional Liability-\$1 Million

CAMP Construction | Billy Griffin, Vice President of Sales bgriffin@campconstruction.com | 713-413-2267

ANNUAL SAL	ES VOLUME	PRIMARY NAICS CODES		
2015 — \$1,26		Graphic Design Services	541430	
2014 — \$1,18	9,101	Marketing Consulting Services	541613	
2013 — \$1,46	7,280	Custom Computer Programming Services — Design/Development	541511	
FED TAX ID	65-1165363	Commercial Printing	323110	
DUNS#	93-106-7339	Display Advertising	541850	
Cage Code	5KZM8	Photography	541921	

» SUSAN REPKA, Business Development susan@keystoneresources.com

713.874.0162 | keystoneresources.com

RFQ

Request for Qualifications or Request for Information

I need this done.

Are you Able to build it?

RFB

Request for Bid or Request for Quote

I need this done.

What will you charge me to build it?

Defining Our World

RFP

Request for Proposal or Request for Tender

I have this problem. What is the best solution, how much it will cost me, and can you do it?

- Easy to prepare
- Price-based response
- Usually for straight commodity or price
- Under a certain value
- More informal
- Price guaranteed for shorter time
- Can be an informal request (email or phone call)
- Can be a formal request
- Short response time
- Price is King.

RFQ

Request for Qualifications or Request for Information

I need this done.

Are you Able to build it?

RFB

Request for Bid or Request for Quote

I need this done.

What will you charge me to build it?

Price + benefits = Who will reduce the client's risk the most?

- Takes more planning and effort to prepare
- Competitive process
- Usually for higher valued or higher risk projects
- Structured outline
- Detailed pricing
- Contract and bonding
- Formal process

RFP

Request for Proposal or Request for Tender

I have this problem. What is the best solution, how much it will cost me, and can you do it?

Factors to WIN...They are all the same!

Type	Client Relationship	Reputation	Experience	Solution	Competitive	Timely	Compliant
RFQ	*	*	*	*	*	*	*
RFB	*	*	*	*	*	*	*
RFP	*	*	*	*	*	*	*



\$50 OFF Your Capabilities Statement

(Offer Expires April 30th, 2017)

A capability statement details a company's basic information, contact information and selling points of the company, including NAICS codes and certifications.

All government agencies will request your capability statement.



keystoneresources.com



KR Creative



KeystoneResources





Win Rate & Capture Ratio

Track your win rate and capture ratio for the your business units:

Service Lines / Business Units:

- Affordable Housing
- Construction
- Investment Management

Government

- State
- Local

Partnering Opportunities

- Prime
- Teams

Other

Public-Private Partnerships (P3)

Three Biggies







Schedules

Resources

Costs

Compliance vs Responsive

Non-Compliant

Not Following Instructions / Requirements

- Page Limitations
- Due Date / Time
- Formatting

Non-Responsive

Not Addressing the Customer's Underlying Needs

- Canned Information
- Making Assumptions

Reviewing

No Interruptions

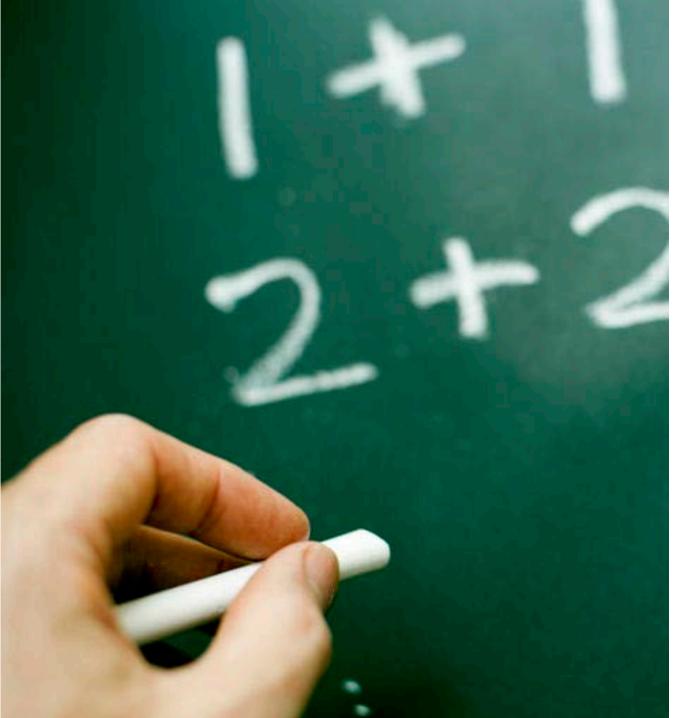
3 Highlighters – Different Colors

DO

???







Proposal Math

1 — Original

0 – Copies

1 — Your Copy

2 COPIES

Tabs / Files / Folders

Cover Letter

Section VII - Proof of Insurance

Section VIII – General Information Questionnaire (15 Questions)

Exhibit A – Execution of Offer

Exhibit B - HUB Plan

Exhibit F - Pricing

The Matrix

Cover Letter	cover letter providing a brief summary of your response	Steph	Calvin	01/28/15	
cover Letter	core recording to the commany or your response	CKOPIT	Currin	O REGITO	
	Primary Contact Response Form (FORM 3)	Steph	Calvin	01/28/15	
	Exhibit B: List of Projects Sought (FDRM 4)	Steph	Calvin	01/28/15	
	Firm's Profile Form (FORM 5)	Steph	Calvin	01/28/15	
	Firm's Qualifications (general narrative)	- Copin		012010	
	3 References (FORM 5B X3)	Steph	Calvin	01/28/15	
	Provide Relevant Higher Education Experience	Steph	Calvin	01/28/15	
	Project 1:	Steph	Calvin	01/28/15	
	Project 2:	Steph	Calvin	01/28/15	
ualifications	Project 3:	Steph	Calvin	01/28/15	
	Project 4:	Steph	Calvin	01/28/15	
	Project 5:	Steph	Calvin	01/28/15	
	Project 6:	Steph	Calvin	01/28/15	
	Project 6.	Stepn	Calvin	0 #20/19	
	AVANDO Labella and institute the local state of the	C	Calvin	01/28/15	
	AWARDS: Include any significant accomplishments or recognition the firm received in the course of providing services similar the LSC projects Provide a list of Respondent's offices / locations that will serve LSCS	Steph Steph	Calvin	01/28/15	
	Provide a list or Hespondent's ornices riocations that will serve LSUS	Stepn	Calvin	0 #28/15	
		C: 1	0.1.1	01/28/15	
Approach	Approach and Methodology Narrative - from predesign to close out & warranty phases	Steph Steph	Calvin Calvin	0 W28/15 0 W28/15	
	Firms may choose to include the following, but not limited to: Representitive samples of flow charts of process rendered by your firm to other entities	Steph	Calvin	01/28/15	
		Steph	Calvin	0 #28/15	
	Representitive Samples of floor plans, renderings, etc.	Stepn	Calvin	0 #28/15	
	List the Lead Professionals & Support Staff (Table Page)	Steph	Calvin	01/28/15	
	Experience of Lead Personnel Form (FORM 5d)	Steph	Calvin	01/28/15	
	Resumes should include: Description of areas of expertise, title, total years experience, relevant efforts in a similar role.	Steph	Calvin	01/28/15	
	Christus Powell	Steph	Calvin	01/28/15	
	Calvin Deese	Steph	Calvin	01/28/15	
	Daphne Floran	Steph	Calvin	01/28/15	
	Alfonzo Solorio?	Steph	Calvin	01/28/15	
Daniman	Other resume Chris mentioned	Steph	Calvin	01/28/15	
Resumes	Morris - Chris Royster?	Steph	Calvin	01/28/15	
	Infrastructure Associates - Rahim & Anwar?	Steph	Calvin	01/28/15	
	Civil?	Steph	Calvin	01/28/15	
	Others?	Steph	Calvin	01/28/15	
	Describe the firm's Project Management Process.	Steph	Calvin	01/28/15	
	Describe how the different roles listed play in to a typical project through the various phases including design meetings, day-to-day management				
	& Construction Administration	Steph	Calvin	01/28/15	
	Certificates of all firms	Steph	Calvin	01/28/15	
rticipation of		Steph	Calvin	01/28/15	
JB, Minority,	Indicate percentage firm wishes to achieve	Steph	Calvin	01/28/15	
Veteran &	Provide procedures to achieve the established plan	Steph	Calvin	01/28/15	
. C.C. an ox	Provide eample tools your firm uses to report to owners on the actual use of Certified Businesses	Steph	Calvin	01/28/15	

Have a minimum of 3 References at all times

Have at least three per business line or services or product offered

KEYSTONE RESOURCES

- Higher Education
- City of Houston
- Non-Profit

STAFFING

- Private
- State
- Technology

ARCHITECT

- K-12
- Higher Education
- Community Centers





How Do You Get A Testimonial Or A Reference Letter or A Reference

YOU ASK!

Before you Ask

Make sure they were happy

More than one project together

Similar type of project

Did you leave the project on good terms

Would they use you again or are you doing for continued work for them



When you Ask

Let them know what you would like for them to talk about:

- Project Management
- Budget
- Schedule
- Quality of work
- Communication
- Creativity
- Challenge / Solution / Impact or Result
- Your company's differentiators





Let the reference know you listed them in a proposal

Dear Mr. Smith,

Thank you again for your continued business and support. We are currently pursing work with the University of Houston and would like to let you know that we listed you as a reference in the submission.

The evaluation committee will be reviewing the proposals from January 14 – February 20, and will be calling references during that period.

Should you have any questions, please don't hesitate to reach me at 713-874-0162.



Hot Buttons			
#1	#2	#3	#4
Ex. Improve system availability			
Solution			
2 hour response			
Alternative(s) Considered			
2-hour response			
Discriminations			
No additional cost			
Greater availability			
Proof			
Experience			
List area clients & equip #			



Mad Libs

We have completed XXX projects within time frame.

These projects are similar to proposed project:

- Bullet 1 & why
- Bullet 2 & why
- Bullet 3 & why

The Challenge and solution for XXX project was/is
Challenge: <u>(details)</u>
Solution: <u>(specifics)</u>
Result:(savings, schedule)_

Name	Date	
Mad Libs V	Vorksheet	3
Make Me A Vi	deo Game!	
I the	(Adjective) and	
(A	djective)	(A First
Name) has	(Past Tense	
Verb)	(A First Name)'s	
	(Adjective) sister and pla	ans to steal her
	(Adjective)	(Plural Noun)!
What are a	(Large Animal) and	backpacking
(S	mall Animal) to do? Before y	ou can help
	(A Girl's Name), you'll ha	ave to collect the
	(Adjective)	(Plural Noun)
and	(Adjective)	(Plural
Noun) that ope	en up the((Number 1-50) worlds
connected to A	(First Nar	me's) Lair. There are
	(Number)	(Plural Noun) and
	(Number)	(Plural Noun) in
the game, alo	ng with hundreds of other go	odies for you to find.
© T	his worksheet is from <u>www.teach</u>	n-nology.com

Features / Benefits / Proof

GREEN – Our offer's feature/strength statement
PURPLE – Benefit to the client statement
BLUE – Substantiating evidence and proof

EXAMPLE:

We will provide you with the <u>awesome</u>. The <u>awesome</u> increases efficiency while decreasing your costs. For example, we successfully provided the <u>awesome</u> to Acme Tomato and their costs decreased 25% in the first quarter due to our unique project management expertise and implementation.



Scoring

Criteria	Weight	US	Incumbent	Company A
Technical	25	25	20	15
Past Performance	25	20		
Price	25	25		
Creative Solutions	20	18		
Financial	5	5		
Total Score	100	93		

Kick-off Pink Team Red Team



Connect with Julie

Julie Marie Irvin

President & Founder keystoneresources.com







julie@keystoneresources.com



fb.com/keystoneresources



twitter.com/@KR_Creative



linkedin.com/in/keystoneresources