Request for Proposal 25-310

Professional Services for: Phase V Survey of the Maple Ridge Historic Residential District

Department: Department of City Experience

NIGP Commodity Code(s): 956-30, 918-31, 906-48, 925-86, 918-89, 962-52

RFP Schedule

EVENT	DATE
RFP Issue Date	11/06/2024
Pre-Proposal Conference	No Pre-Proposal Conference
Deadline for Questions	12/02/2024
Submit to assigned buyer via email.	10 Days prior to RFP due date
Proposal Due Date	12/11/2024
Mail or deliver to City Clerk address. Proposals are open the day after the due date.	

If You have any questions or need additional information, contact the Assigned Buyer:

Angie Tune, Senior Buyer | atune@cityoftulsa.org All questions should be emailed with the **RFP 25-310** number in the subject line.

Submit proposals (sealed) to:

Office of the City Clerk City of Tulsa 175 E. 2ND St. Suite 260 Tulsa, OK 74103



I. OVERVIEW AND GOALS:

With this Request for Proposal (RFP), we are searching to secure professionally qualified individuals to complete an intensive-level architectural/historic survey of portions of the Maple Ridge Historic Residential District. The boundaries of the area are shown in the attached map (Page 15). The purpose of the survey is to identify contributing and non-contributing resources within the district and to prepare documentation sufficient for an update to the National Register of Historic Places Registration Form. The project is funded by a federal matching grant-in-aid from the U.S. Department of the Interior's Historic Preservation Fund, administered by the Oklahoma State Historic Preservation Office (OK/SHPO). We enthusiastically look forward to receiving your proposal.

II. BACKGROUND:

Completed in 1982 in anticipation of the construction of an expressway, the nomination of the Maple Ridge Historic Residential District to the National Register of Historic Places identified only some properties as contributing resources. The City of Tulsa intends to survey the entire district over several phases to identify contributing and non-contributing resources within the district. The survey will provide documentation sufficient for an update to the National Register of Historic Places Registration Form. Areas of the Maple Ridge Historic Residential District which have already been surveyed include the Morningside, Maple Heights, Maple Park, Maple Ridge, and Sunset Park Additions. An estimated 154 properties are included in the current survey phase. Shown in the attached map, the survey area comprises of the area bounded on the north by 21st Street, on the east by Peoria Avenue, on the south by 24th Place and on the west by the Midland Valley Trail.

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III. TIMELINE:

The schedule below provides estimated dates for the RFP and contracting process. The City of Tulsa may adjust this schedule as needed.

EVENT	DATE
RFP Issue Date	11/06/2024
Deadline for Questions	12/02/2024
PROPOSAL DUE DATE	12/11/2024
Proposal Opening	12/12/2024
Begin proposal evaluations	12/16/2024
Negotiations with apparent successful Respondent begin (anticipated)	12/30/2024
Execute contract (anticipated)	01/22/2025
Begin service delivery (anticipated)	01/27/2025

IV. SCOPE OF WORK:

- 1. The Respondent shall document all properties in the survey area at the minimum level, regardless of age or condition. Minimum recording includes the completion of a Historic Preservation Resource Identification Form and two (2) elevation photographs of the property. Additional photographs may be necessary for larger or more complex resources.
- 2. The Respondent shall conduct the survey work in accordance with the Secretary of the Interior's Standards and Guidelines for Identification and Evaluation and the guidelines for intensive-level surveys set forth in the OK/SHPO's *Architectural/Historic Resource Survey: A Field Guide* (available at www.okhistory.org/shpo/docs/fieldguide.pdf).
- **3.** The Respondent shall submit a first draft and a final draft of the survey documentation for review by the City and the OK/SHPO. The Respondent will be responsible for completion of revisions requested by the City and the OK/SHPO.

The survey budget for Phase V Survey of the Maple Ridge Historic Residential District is \$16,654.00.

V. DELIVERABLES:

Detailed requirements for Architectural/Historic Survey documentation are available at <u>www.okhistory.org/shpo/surveyrequirements.htm</u>. The products and reports to be delivered to the City include:

- 1. A written project report and narrative historic context for the survey area,
- **2.** A completed Historic Preservation Resource Identification Form for each property within the survey area,
- 3. At least two (2) elevation photographs of each property within the survey area,
- **4.** A map with an indication of the boundaries of the survey area and the identification of contributing and non-contributing resources to the Maple Ridge Historic Residential District, and
- **5.** A map showing the location of any properties within the survey area that are individually eligible for listing in the National Register.

VI. PERFORMANCE METRICS AND CONTRACT MANAGEMENT:

Performance Metrics

The following performance metrics highlight key priorities that will be analyzed with the awarded Respondent collaboratively during the life of the contract. This is not an exhaustive list, but rather an indication of significant performance metrics of interest to City of Tulsa. The City looks forward to working with awarded Respondents to define additional important performance metrics during contract negotiations. The final set of performance metrics and frequency of collection will be negotiated by the successful Respondent and the City prior to the finalization of an agreement between parties and may be adjusted over time as needed.

Performance Metric	Data Source	Data Collection Frequency	Data Collection Responsibility
Square miles surveyed at intensive- level	Respondent field data	Quarterly	Respondent
Number of properties documented at National Register level	Respondent field data	Quarterly	Respondent
Work hours expended	Respondent	Quarterly	Respondent

Contract Performance Monitoring

As part of the City of Tulsa's commitment to becoming more outcomes-oriented, we seek to actively and regularly collaborate with awarded Respondents to enhance contract management, improve results, and adjust service delivery based

on learning what works. Reliable and relevant data is necessary to drive service improvements, ensure compliance, inform trends to be monitored, and evaluate results and performance. During the regular meetings that occur throughout the term of the contract, it is anticipated that the following topics will be regularly discussed:

- Current status of performance metrics
- Topics of interest or concern to the Respondent
- Discussion and troubleshooting of challenges
- Review of activities on the horizon
- Review of budget and spending this year-to-date

VII. INSTRUCTIONS FOR SUBMITTING A PROPOSAL:

A. Proposals must be received by 5:00 p.m. on Wednesday, December 11, 2024, Central Standard Time. Please place proposals in a sealed envelope or box clearly labeled "RFP 25-310, Phase V Survey of the Maple Ridge Historic Residential District."

Proposals received late will be returned unopened.

B. Interested Respondents should submit:

Two (2) unbound original and two (2) bound copies of the proposal plus one (1) digital copy (compact disc or USB drive)

C. Proposals shall be delivered and sealed to:

Deputy City Clerk City of Tulsa 175 E. 2nd St. Suite 260 Tulsa, OK 74103

D. All interested Respondents (Sellers) are required to register with the Buyer in order to receive updates, addenda or any additional information required. You can learn more about the registration process on the following website: <u>https://www.cityoftulsa.org/government/departments/finance/selling-tothe-city/register-as-a-vendor/</u>.

The City is not responsible for any failure to register.

E. Inquiries or questions to the Buyer requesting clarification regarding the Request for Proposal must be made <u>via e-mail</u> and must be received prior to the end of the business day on **Monday, December 2, 2024**.

Angie Tune, Project Buyer ATune@cityoftulsa.org Any questions regarding this RFP will be handled as promptly and as directly as possible. If a question requires only minor clarification of instructions or specifications, it will be handled via e-mail. If any question results in a substantive change or addition to the RFP, the change or addition will be forwarded to all registered Respondents as quickly as possible by addendum.

F. Proposals will be opened on the morning after the due date, at 8:30am, at the:

Standards, Specifications, and Awards Committee Meeting 175 East 2nd Street, 2nd Floor City Council Chamber

VIII. RESPONSE QUESTIONS AND PROPOSAL REQUIREMENTS

To be considered, interested Respondents should submit or address the following questions or information requests:

Qualifications and Experience

- **A.** Provide a general overview of your organization. Why is your organization uniquely qualified to take on this Scope of Work?
- **B.** Provide a resume for each key team member, clearly demonstrating that they meet the Secretary of the Interior's Professional Qualification Standards for a historian, architectural historian, or architect. It is noted that equipment, materials, and staff shall be provided by the Respondent.
- **C.** Describe the extent of your organization's experience in conducting similar projects. Please also provide a list of successfully completed National Register of Historic Places nominations prepared and surveys conducted within the last five (5) years.

Service Delivery and Timeline

- **D.** Provide a detailed description of your organization's ability, approach, and methodology for this project in line with the RFP objectives and key elements outlined in the Scope of Work.
- **E.** Provide a proposed work schedule for your project, including key milestones related to the Scope of Work. The schedule should incorporate the following milestones:
 - i. First draft of report and forms should be submitted on or around February 13, 2025, with a 30-day review by the City and OK/SHPO.
 - **ii.** Final draft of report and forms should be submitted on or around April 30, 2025, with a 15-day review by the City and OK/SHPO.
 - iii. All project work must be completed by May 30, 2025.

Project Management and Reporting

F. Describe your proposed method of project management for this project. This should include the provision of the performance metric data listed in Section VI to City staff at the end of each quarter.

Pricing and Cost Proposal

G. In addition to the Price Sheet Summary, provide an itemized budget for the completion of the project, including, but not limited to, expenses related to time, travel, photography, preparation of maps and photocopies, and supplies. It is noted that invoice scheduling will be determined during negotiation of a contract with the selected Respondent.

IX. EVALUATION OF PROPOSALS:

The approval of the selected Respondent will be subject to the final determination of the City and will be contingent on the successful completion of a contract between the City and the selected Respondent(s).

In this RFP, a panel consisting of not less than three City of Tulsa employees will evaluate proposals. Final selection shall be the sole determination of the City, and if a selection is made it will be to the Respondent whose proposal is determined to be in the best interests of the City.

Category	Total Points	What Would a Top Score Look Like?
Qualifications and Experience	25	Respondent clearly demonstrates that key team members meet the Secretary of the Interior's Professional Qualification Standards for a historian, architectural historian, or architect. Respondent demonstrates extensive successful experience in carrying out similar types of project work.
Service Delivery and Timeline	25	Respondent demonstrates a complete understanding of the project and the Secretary of the Interior's Standards and Guidelines. The project schedule is sufficient to ensure successful completion of the project in a timely manner, and incorporates key milestones related to the scope of work.
Project Management and Reporting	25	Respondent clearly outlines a plan to complete the project within a timely manner and incorporates key milestones and performance metrics.
Pricing and Cost Proposal	25	The proposed budget is sufficient to ensure successful completion of the project, and each cost is reasonable and necessary.

All Bids will be evaluated using the following criteria:

The City of Tulsa also reserves the right to evaluate based on the full list of eligible criteria listed in <u>Title 6</u>, <u>Chapter 4</u> of the Tulsa Revised Ordinances (TRO): <u>https://library.municode.com/ok/tulsa/codes/code_of_ordinances</u>.

X. MISCELLANEOUS

- A. The City expects to enter into a written Agreement (the "Agreement") with the chosen Respondent that shall incorporate this RFP and the selected Respondent's proposal. Further, Respondent will be bound to comply with the provisions set forth in this RFP. In addition to any terms and conditions included in this RFP, the City may include in the Agreement other terms and conditions as deemed necessary. Your response to this RFP will be considered part of the Agreement if one is awarded to you.
- **B.** All data included in this RFP, as well as any attachments, are proprietary to the City of Tulsa.
- **C.** The City of Tulsa notifies all possible Respondents that no person shall be excluded from participation in, denied any benefits of, or otherwise discriminated against in connection with the award and performance of any contract on the basis of race, religious creed, color, national origin, ancestry, physical disability, sex, age, ethnicity, or on any other basis prohibited by law.
- **D.** All Respondents shall comply with all applicable laws regarding equal employment opportunity and nondiscrimination. They shall also comply with the Americans with Disabilities Act (ADA).
- **E.** The use of the City of Tulsa's name in any way as a potential customer is strictly prohibited except as authorized in writing by the City of Tulsa.
- **F.** The City assumes no responsibility or liability for any costs you may incur in responding to this RFP, including attending meetings or contract negotiations.
- G. The City is bound to comply with Oklahoma's Open Records Act, and information submitted with your proposal, with few exceptions, is a matter of public record. For specifics on the Oklahoma Open Records Act, see the link here: <u>https://libraries.ok.gov/law-legislative-reference/library-laws/statutesopen-records/</u>.

The City shall not be under any obligation to return any materials submitted in response to this RFP request.

- H. The City shall not infringe upon any intellectual property right of any Respondent but reserves the right to use any concept or methods contained in the proposal. Any desired restrictions on the use of information contained in the proposal should be clearly stated. Responses containing your proprietary data shall be safeguarded with the same degree of protection as the City's own proprietary data. All such proprietary data contained in your proposal must be clearly identified.
- I. The City of Tulsa also notifies all Respondents that the City has the right to modify the RFP and the requirements herein, to request modified proposals

from Respondents, and to negotiate with the selected Respondent on price and other contract terms, as necessary to meet the City's Objectives.

J. Payment. Invoices should be e-mailed to the City of Tulsa – Accounts Payable at: apinvoices@cityoftulsa.org. Payment will be made net 30 days after receipt of a properly submitted invoice or the City's Acceptance of the Supplies or Services, whichever is later.

Each invoice must be fully itemized, identifying Supplies provided and/or Services performed, and must bear the purchase order number assigned by the City.

The purchase order number shall appear on all invoices, packing lists, packages, shipping notices, instruction manuals and other written documents relating to the Supplies or Services. Packing lists shall be enclosed in each and every box or package shipped pursuant to this Agreement, indicating the content therein.

K. The selected Respondent "Seller" and its subcontractors must obtain at Seller's expense and keep in effect so long as City is purchasing Supplies or Services from Seller pursuant to this Proposal, policies of insurance in the minimum amounts set forth below and Workers' Compensation and Employer's Liability insurance in the statutory limits required by law.

General Liability: personal injury and property damage, each occurrence	\$1,000,000.00
Auto Liability, each occurrence	\$1,000,000.00
Workers' Compensation	(Statutory limits)

- L. Seller's insurer must be authorized to transact business in the State of Oklahoma. Seller will have 10 Days after notification that its Proposal was Accepted by the City on behalf of TARE to provide proof of coverage. The Certificate of Insurance must be completed with the following information:
 - A. Your name
 - B. Insurer's name and address
 - C. Policy number
 - D. Liability coverage and amounts
 - E. Commencement and expiration dates
 - F. Signature of authorized agent of insurer
 - G. Certificate Holder Information: <u>Tulsa Authority for the Recovery of Energy</u> and the City of Tulsa, and their respective officers, trustees, and employees, 175 East 2nd St., Suite 260, Tulsa, OK 74103

Respondent's Legal Name: (Must be Respondent's company name as reflect Respondent is organized)	ed on its organizatior	al documents, filed with the s	tate in which
State of Organization:			
Respondent's Type of Legal Entity: (check one)		
□ Sole Proprietorship		ted Partnership	
□ Partnership			
 Corporation Limited Liability Company 		ted Liability Limited Part	•
		er:	
Respondent's Address:			
Street	City	State	Zip Code
	City		·
Street	City		
Street Respondent's Website Address:	City		ce:
Street Respondent's Website Address:	City Na	Contact for Legal Noti	ce:
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- □ Email from Assigned Buyer
- □ City of Tulsa Website
- □ Tulsa World posting
- □ Purchasing search engine
- □ Industry colleague
- Other: Click or tap here to enter text.

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ame Printed:	

	AFFIDAVIT
	NON-COLLUSION, INTEREST, AND CLAIMANT
STATE	E OF))ss.
COUN	TY OF)
I,	, of lawful age, being first duly sworn, state that: (Seller's Authorized Agent)
	(Seller's Authorized Agent)
1.	I am the Authorized Agent of Seller herein for the purposes of certifying facts pertaining to the existence of collusion between and among Bidders and municipal officials or employees, as well a facts pertaining to the giving or offering of things of value to government personnel in return for speci consideration in the letting of any contract pursuant to the proposal to which this statement is attached.
2.	I am fully aware of the facts and circumstances surrounding the making of Seller's Bid to which th statement is attached, and I have been personally and directly involved in the proceedings leading the submission of such Bid; and
3.	 Neither the Seller nor anyone subject to the Seller's direction or control has been a party: a. to any collusion among Bidders in restraint of freedom of competition by agreement to respond at a fixed price or to refrain from responding, b. to any collusion with any municipal official or employee as to quantity, quality, or price the prospective contract, or as to any other terms of such prospective contract, nor c. in any discussions between Bidders and any municipal official concerning exchange money or other thing of value for special consideration in the letting of a contract.
4.	No officer or employee of the City of Tulsa either directly or indirectly owns a five percent (5%) intere or more in the Bidders business or such a percentage that constitutes a controlling interest. Affia further states that the following officers and/or employees of the City of Tulsa own an interest in the Bidders business, which is less than a controlling interest, either direct or indirect.
5.	All invoices to be submitted pursuant to this agreement with the City of Tulsa will be true and correct
6.	That the work, services or material furnished will be completed or supplied in accordance with the plans, specifications, orders, requests or contract furnished or executed by the affiant. Affiant further states that (s)he has made no payment directly or indirectly to any elected official, officer or employed of the City of Tulsa, or of any public trust where the City of Tulsa is a beneficiary, of money or ar other thing of value to obtain payment of the invoice or procure the contract or purchase ord pursuant to which an invoice is submitted. Affiant further certifies that (s)he has complied with a applicable laws regarding equal employment opportunity.
	By:Signature
	Title:
Subsci	ribed and sworn to before me thisday of, 20
Notary	Public
My Co	mmission Expires:
Notary	Commission Number:

APPENDIX A – City of Tulsa General Contract Terms

It is anticipated that the City of Tulsa will enter into an Agreement with the selected Respondent ("Seller") for an initial term ending one (1) year from the date of its execution by the City's Mayor, with four (4) one-year renewals available at the option of the City. Contracts entered into by the City of Tulsa generally include, but are not limited to, the following terms:

- Renewals. Seller understands and acknowledges that any future contracts or renewals are neither automatic nor implied by this Agreement. The continuing purchase by City of the Services set forth in this Agreement is subject to City's needs and to City's annual appropriation of sufficient funds in City's fiscal year (July 1st to June 30th) in which such Services are purchased. In the event City does not appropriate or budget sufficient funds to perform this Agreement, this Agreement shall be null and void without further action by City.
- 2. No Indemnification or Arbitration by City. Seller understands and acknowledges that City is a municipal corporation that is funded by its taxpayers to operate for the benefit of its citizens. Accordingly, and pursuant to Oklahoma law, City shall not indemnify nor hold Seller harmless for loss, damage, expense or liability arising from or related to this Agreement, including any attorneys' fees and costs. In addition, Seller shall not limit its liability to City for actual loss or direct damages for any claim based on a breach of this Agreement and the documents incorporated herein. City reserves the right to pursue all legal and equitable remedies to which it may be entitled. City will not agree to binding arbitration of any disputes.
- 3. Intellectual Property Indemnification by Seller. Seller agrees to indemnify, defend, and save harmless City and its officers, employees and agents from all suits and actions of every nature brought against them due to the use of patented, trademarked or copyright-protected appliances, products, materials or processes provided by Seller hereunder. Seller shall pay all royalties and charges incident to such patents, trademarks or copyrights.
- 4. General Liability and Indemnification. Seller shall hold City harmless from any loss, damage or claims arising from or related to the performance of the Agreement herein. Seller must exercise all reasonable and customary precaution to prevent any harm or loss to all persons and property related to this Agreement. Seller agrees to indemnify and hold the City harmless from all claims, demands, causes of action or suits of whatever nature arising out of the services, labor, and material furnished by Seller or Seller's subcontractors under the scope of this Agreement.
- 5. **Liens.** Pursuant to City's Charter (Art. XII, §5), no lien of any kind shall exist against any property of City.
- 6. **No Confidentiality.** Seller understands and acknowledges that City is subject to the Oklahoma Open Records Act (51 O.S. §24A.1 *et seq.*) and therefore cannot assure the confidentiality of contract terms or other information provided by Seller pursuant to this Agreement that would be inconsistent with City's compliance with its statutory requirements there under.
- 7. Compliance with Laws. Seller shall be responsible for complying with all applicable federal, state and local laws. Seller is responsible for any costs of such compliance. Seller shall take the necessary actions to ensure its operations in performance of this contract and employment practices are in compliance with the requirements of the Americans with Disabilities Act. Seller certifies that it and all of its subcontractors to be used in the performance of this agreement are in compliance with 25 O.S. Sec. 1313 and participate in the Status Verification System. The Status Verification System is defined in 25 O.S. Sec. 1313 and includes, but is not limited to, the free Employee Verification Program (E-Verify) available at www.dhs.gov/E-Verify.

- 8. **Right to Audit.** The parties agree that books, records, documents, accounting procedures, practices, price lists or any other items related to the Services provided hereunder are subject to inspection, examination, and copying by City or its designees. Seller shall retain all records related to this Agreement for the duration of the contract term and a period of three years following completion and/or termination of the contract. If an audit, litigation, or other action involving such records begins before the end of the three year period, the records shall be maintained for three years from the date that all issues arising out of the action are resolved or until the end of the three year retention period, whichever is later.
- 9. Governing Law and Venue. This Agreement is executed in and shall be governed by and construed in accordance with the laws of the State of Oklahoma without regard to its choice of law principles, which shall be the forum for any lawsuits arising under this Agreement or incident thereto. The parties stipulate that venue is proper in a court of competent jurisdiction in Tulsa County, Oklahoma and each party waives any objection to such venue.
- 10. **No Waiver.** A waiver of any breach of any provision of this Agreement shall not constitute or operate as a waiver of any other provision, nor shall any failure to enforce any provision hereof operate as a waiver of the enforcement of such provision or any other provision.
- 11. Entire Agreement/No Assignment. This Agreement and any documents incorporated herein constitute the entire agreement of the parties and supersede any and all prior agreements, oral or otherwise, relating to the subject matter of this Agreement. This Agreement may only be modified or amended in writing and signed by both parties. Notwithstanding anything to the contrary herein, the City does not agree to the terms of any future agreements, revisions or modifications that may be required under this Agreement unless such terms, revisions or modifications have been reduced to writing and signed by both parties. Seller may not assign this Agreement or use subcontractors to provide the Goods and/or Services without City's prior written consent. Seller shall not be entitled to any claim for extras of any kind or nature.
- 12. **Equal Employment Opportunity.** Seller shall comply with all applicable laws regarding equal employment opportunity and nondiscrimination.

The undersigned agrees to the inclusion of the above provisions, among others, in any contract with the City of Tulsa.

Company Name:	Date:
Signature:	
Name Printed:	
Title:	-

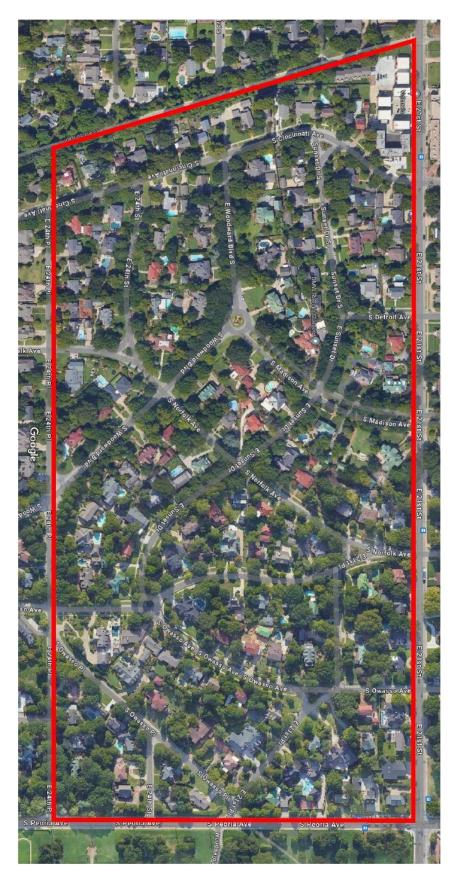
ACKNOWLEDGMENT OF RECEIPT OF ADDENDA/AMENDMENTS

I hereby acknowledge receipt of the following addenda or amendments and understand that such addenda or amendments are incorporated into the Proposal and will become a part of any resulting contract.

List Date and Title/Number of all addenda or amendments: (Write "None" if applicable).

<u>Sign Here</u> ►		
Printed Name:		
<u>Title:</u>		
Date:		

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RESPONDENT CHECKLIST

Use this checklist to ensure You have properly read and completed all documents listed below. This document (the RFP) contains all the following materials, which must be completed and returned to the City of Tulsa Clerk's Office. We recommend You include this checklist with Your proposal.

Proposer's Name: _____

RESPONDENT CHECKLIST			
RESPONDENT DOCUMENTS	INCLUDED?		
Cover Letter			
Proposal Narrative			
Resumes of Key Team Member(s)			
Respondent Information Sheet (required form)			
Price Sheet Summary (required form)			
Affidavit (Non-Collusion and Interest) (required form)			
City of Tulsa General Contract Terms (required form)			
Acknowledgment of Receipt of Addenda / Amendments			
Additional Information (Optional)			

Please Return Entire RFP Packet

PACKING LABEL

FROM:

City of Tulsa - City Clerk's Office

175 East 2nd Street, Suite 260 Tulsa, OK, 74103

Respondent Submission For:

RFP# 25-310 RFP DESCRIPTION: Phase V Survey of the Maple Ridge Historic Residential District

This label ensures that Your proposal will be sent to the correct office (City Clerk's) and that it is associated with the correct Solicitation (indicated by the RFP number). Proposals must be sealed and either mailed or delivered to the City Clerk's Office. Proposals must also be received no later than 5:00 PM (CST) on date listed on the first page of the RFP.