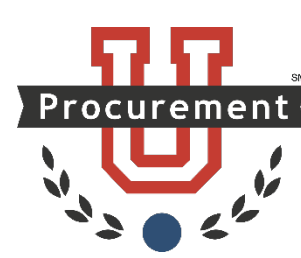


Organizing your Next RFP for Procurement Excellence



Agenda

- **RFPs are essential to successful project outcomes.**
- **The Foundations of Procurement Excellence.**
- **Organizing Your Next RFP for Procurement Excellence.**
- **Putting “RFP Excellence” into Practice.**



Upcoming Workshop Series

Better RFPs, Better Projects

Learn Practical Tools to Improve Your Next RFP

August 17, 24, and 27

- Develop an effective Statement of Work
- Elevate your RFP practices to become a "Client of Choice"
- Implement practical RFP tools, templates, and structure
- Improve the speed & efficiency of your Evaluation Process

Center for Procurement Excellence (CPE)

Center for Procurement Excellence (CPE)

CPE is a non-profit, member based 501(c)6 membership organization

MISSION

Improve effectiveness of RFPs for public and private organizations worldwide

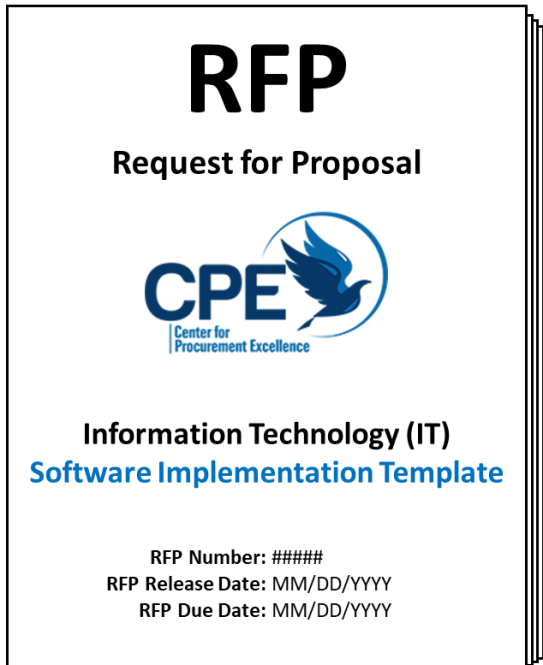
GOAL

RFPs that emphasize the CPE Principles of Fair, Open, Transparent, Value, and Integrity



CPE specializes in High-Performing RFPs

1) Prepare & Advertise



Procurement Process



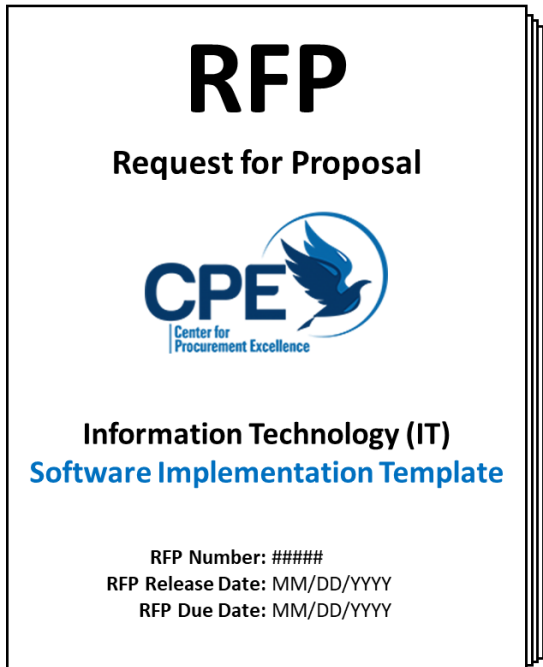
Vendors Submit Responses



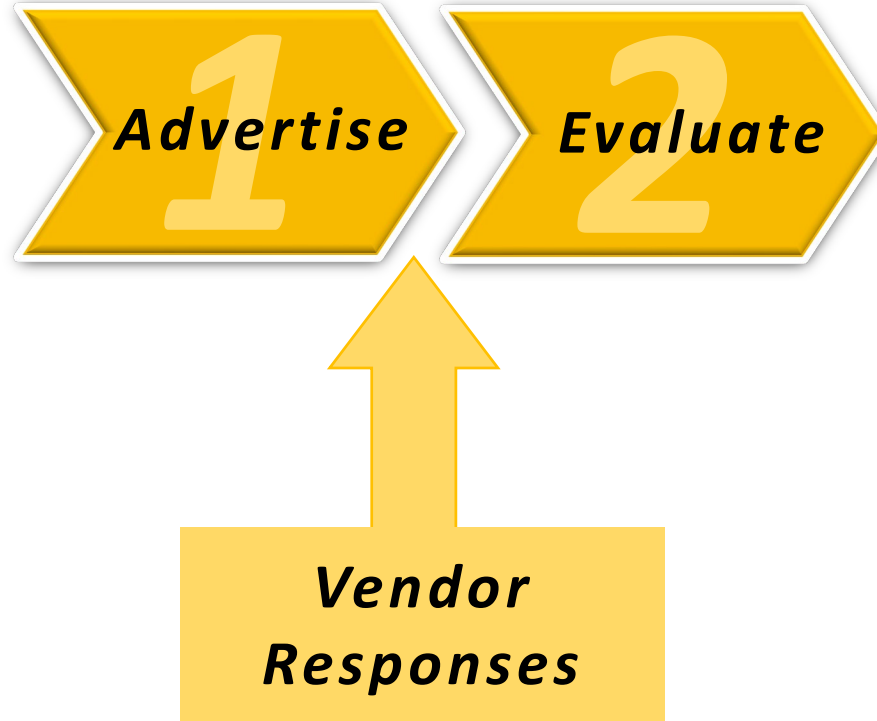
Procurement Process



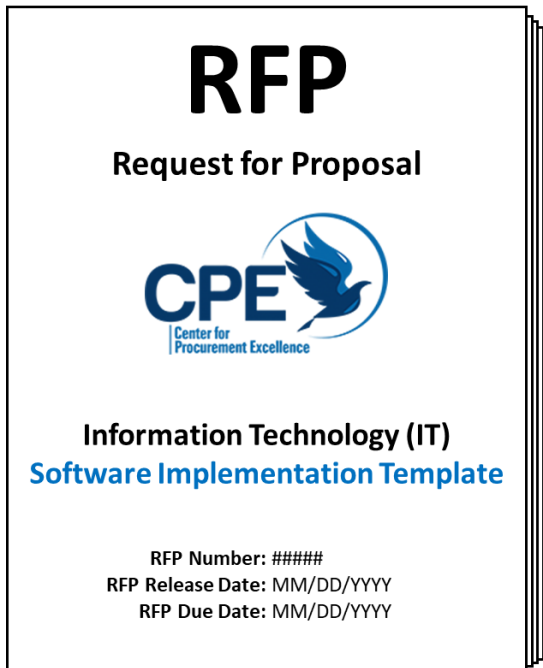
2) Evaluate Responses



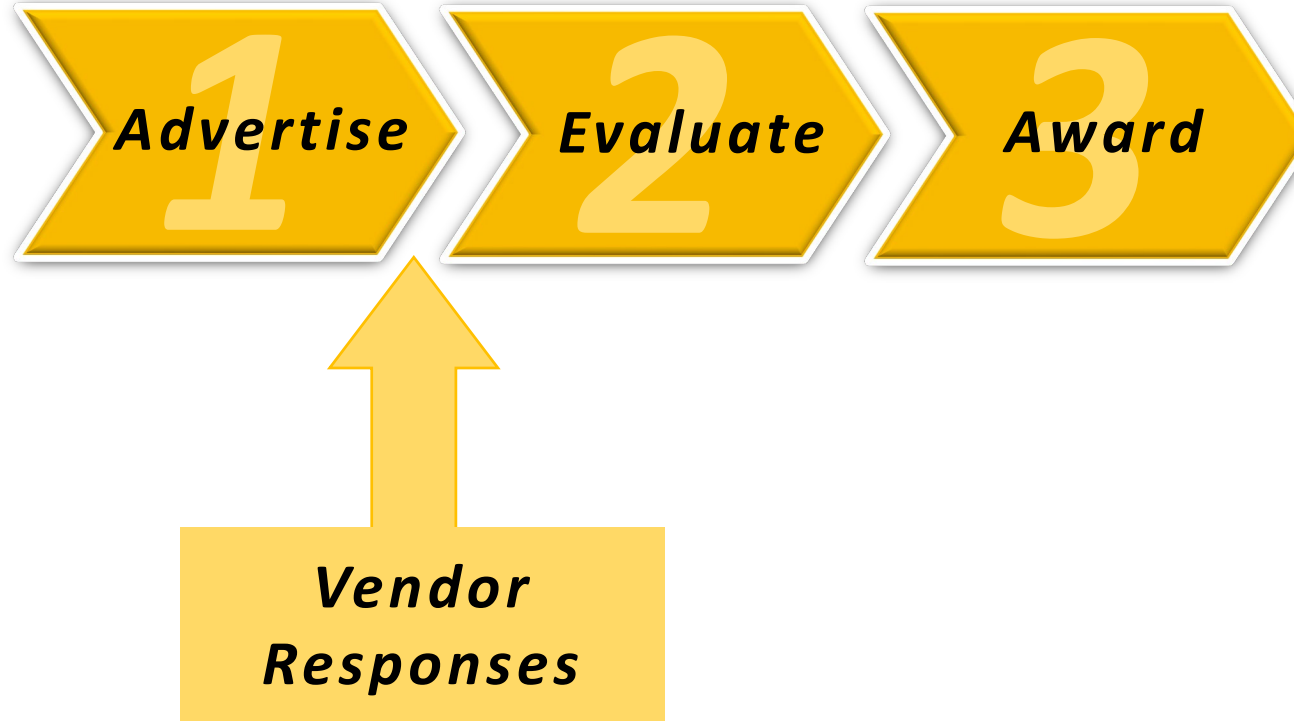
Procurement Process



3) Award Contract



Procurement Process




RFPs are Essential to Successful Project Outcomes

Importance of a High-Performing RFP

RFPs are a direct reflection of your organization and project.

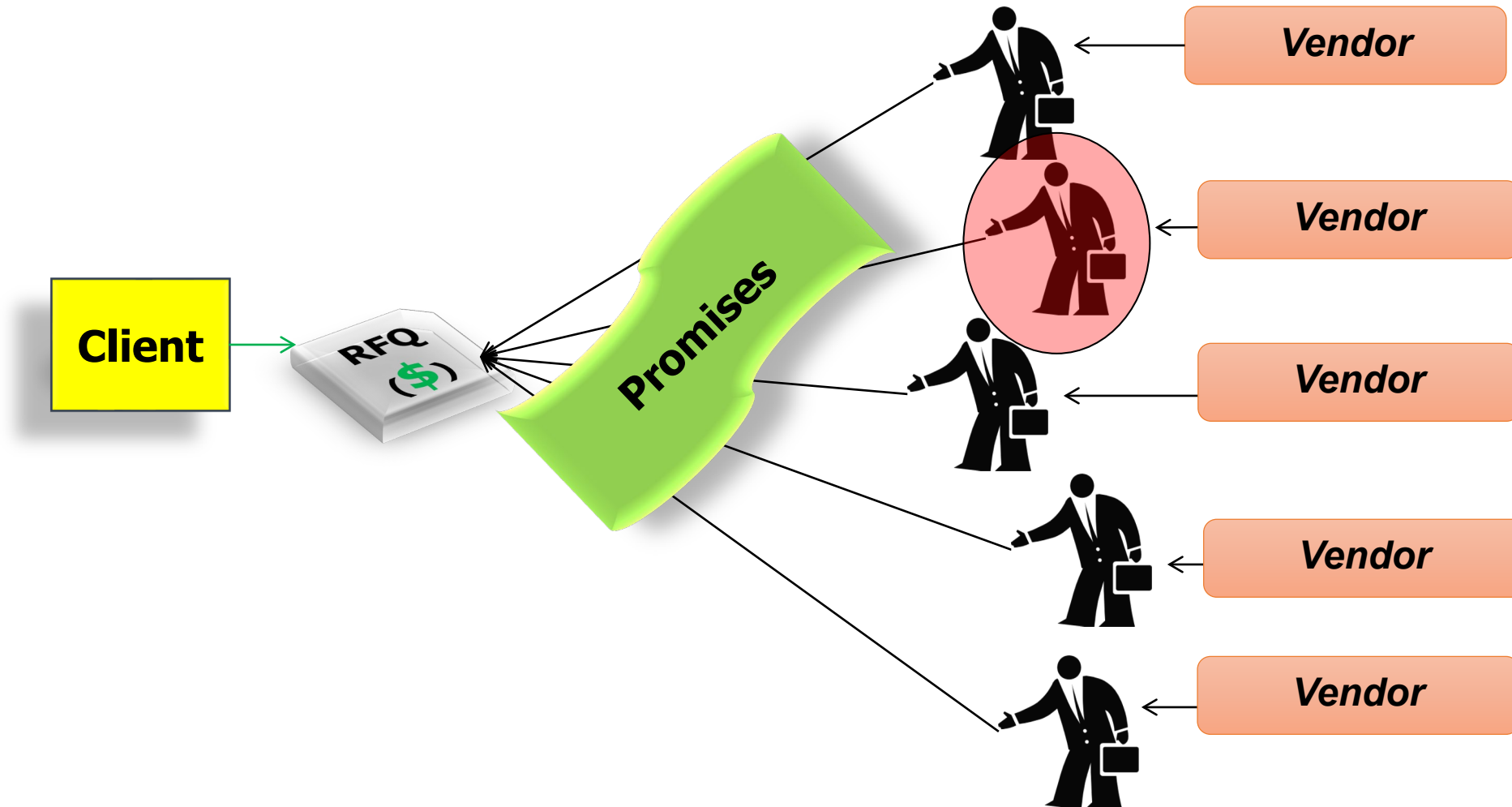
Is your RFP...

- Organized vs. Scattered?
- Professional vs. “Thrown Together”
- Easy-to-Follow vs. Confusing?
- Tailored vs. Recycled?
- High-Performing vs. “Same Old”?

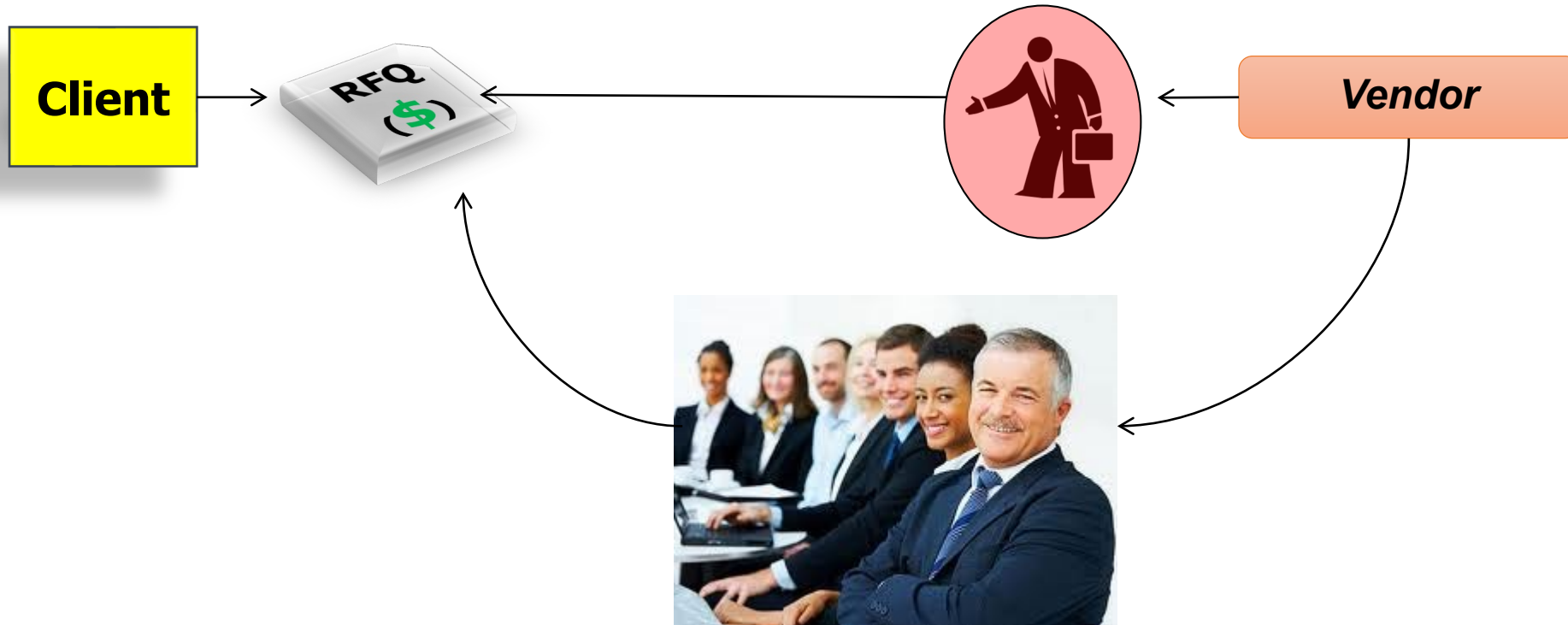


**RFPs are often
associated with
major, complex, and
high-impact initiatives.**

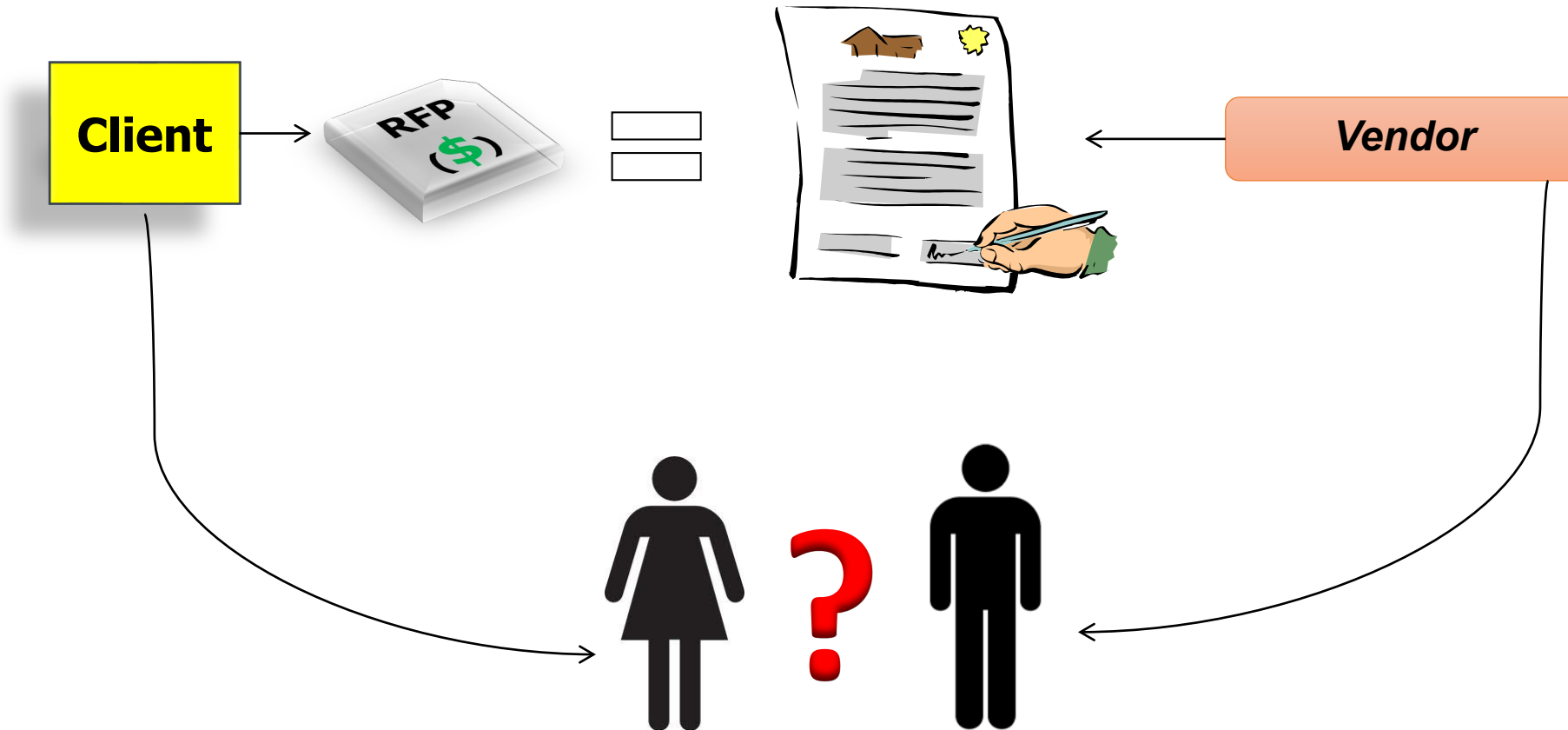
What We Have Seen...



What We Have Seen...




What We Have Seen...



“The **greatest risk I face
is how to accomplish
all of the things
that our sales team
promised we could do.”**

Putting it in the contract does not make it so.

PROMISES

A black and white photograph showing the word "PROMISES" cast in a rough, textured material like concrete. A large, jagged crack runs diagonally through the word, starting from the bottom left and extending towards the top right, symbolizing the fragility of promises.

Problems?

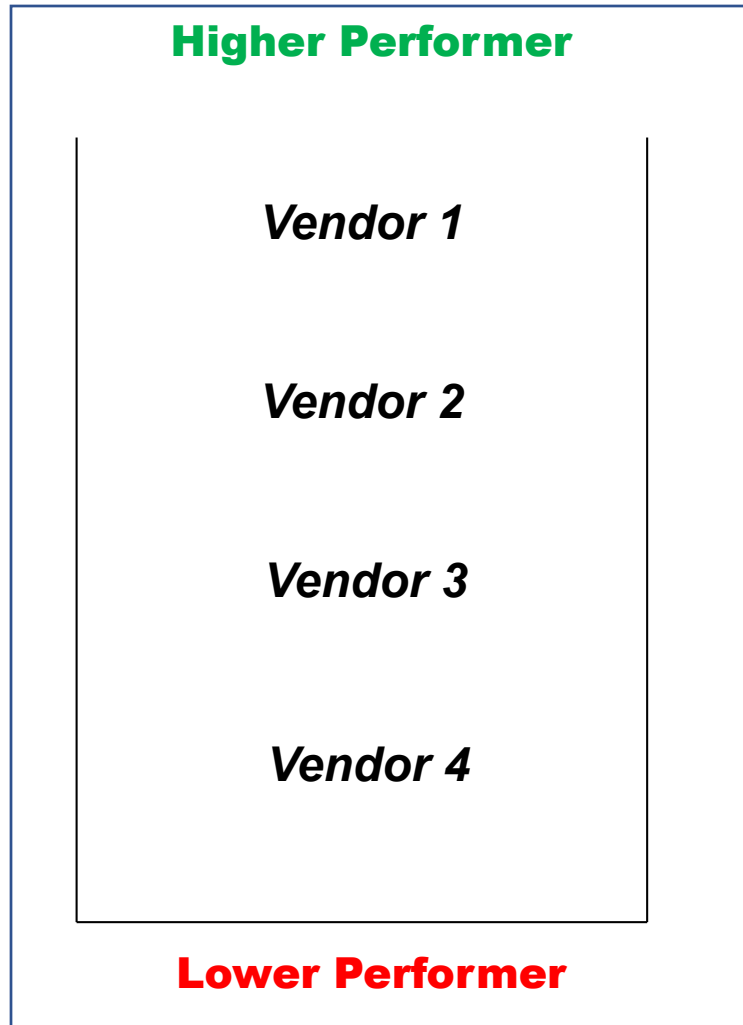


RFPs can be
challenging
to get “right”?

Have you ever experienced...

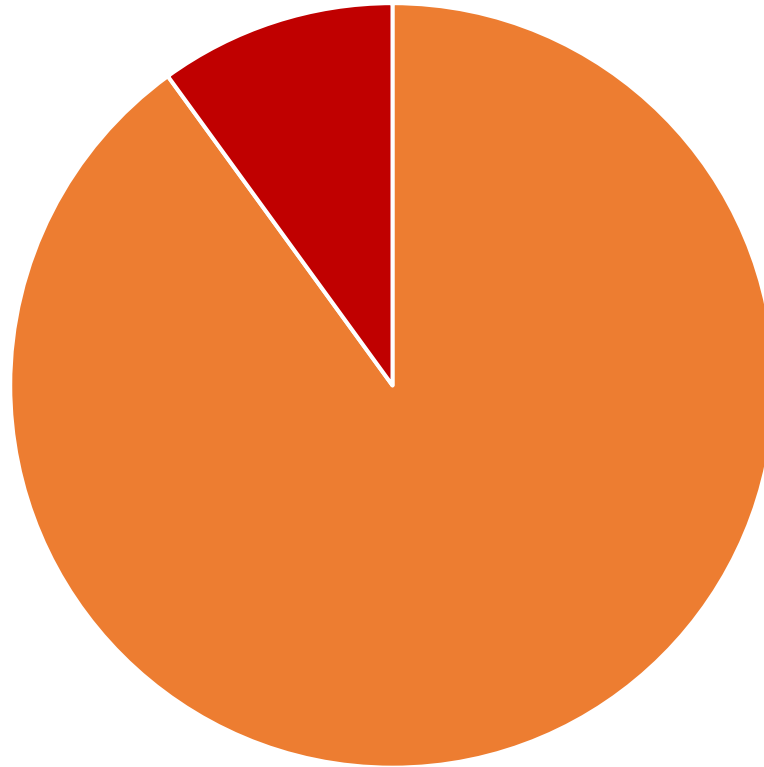
- Promises that are not fulfilled?
- Too much marketing & sales? **CONFUSING EVALUATIONS!**
- Project Teams who are misaligned on their needs?
- Failed negotiations and cancelled projects?

Who says they are the **best**?



All Procurements Are Urgent!

10% Extremely Urgent



90% Urgent



What can we do
to move procurement
into **warp speed**?

Common Things that Slow Down Procurement

- **Poor quality Statement of Work.**
- **Procedural items that are “clunky” or poorly coordinated.**
- **Lack of commitment from users, evaluators, and/or executives.**
- **Lack of clarity on what (and how) to evaluate.**
- **Large volume of proposal materials.**
- **Lack of interest from high-performing vendors.**

Goal:
Become a
“Client of Choice”

What is a Client of Choice?

- Vendors want to propose on your project...
 - With their **best people**
 - In a **thoughtful** manner
 - With their most **competitive pricing**
- Internal Clients see RFPs as a Value-Creator...
 - Bring **innovation**
 - Identify the **best approach**
 - Bring **solutions** to minimize risk in execution
- **Because you are fast, efficient, organized, and professional!**

Foundations of Procurement Excellence

Foundations of Procurement Excellence

- Fair
- Open
- Transparent
- Value
- Integrity

Foundations of Procurement Excellence

- Fair
- Open
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- Value
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For each, let's discuss:

What does it mean?

Why is it important?

How to accomplish it?

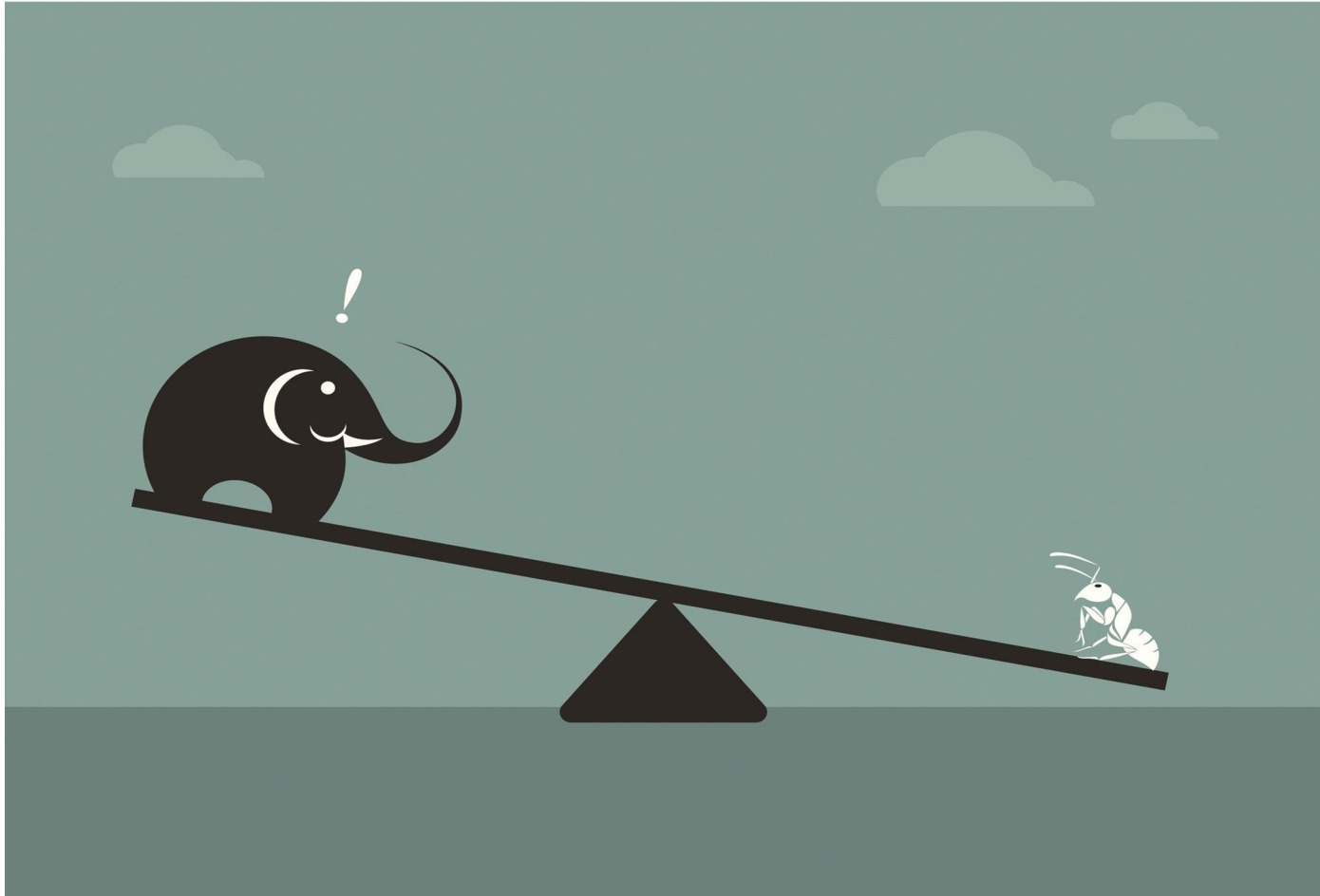
Foundations of Procurement Excellence

- **Fair:** provide all vendors with a fair & equal opportunity to win.
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Foundations of Procurement Excellence

- **Fair:** provide all vendors with an equal opportunity to win.
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Fair: Equal Opportunity to Win



**From a Vendor's
perspective,
Clients are not all
equal.**

Fair: Equal Opportunity to Win

Perceptions of Owner being Unfair or Unequal

- Pre-Conceived
- Restrictive
- Too Fast
- Unrealistic
- Too Much
- Biased
- Misunderstands Needs
- *Discourages Vendors!*



Impact

- Fewer proposals
- Lower quality proposals
- Less qualified teams
- Less competitive pricing
- Less consistent pricing
- Open to interpretation
- Have to believe the supplier
- *Brings Risk to the Project!*

Fair: Equal Opportunity to Win



Being a “**Client of Choice**” means giving vendors an **equal opportunity** to win



Fair: Equal Opportunity to Win

Highlighted Practices from CPE:

- Protect the good of the public and the organization.
- Follow a realistic procurement schedule.
- Minimize bias in evaluations.



Foundations of Procurement Excellence

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Foundations of Procurement Excellence

- **Fair:** provide all vendors with an equal opportunity to win.
- **Open:** encourage and maximize competition.
- **Transparent**
- **Value**
- **Integrity**

Open: Encourage and Maximize Competition

Who knows the most about delivering the required services?

**An Expert
Vendor**

Open: Encourage and Maximize Competition

Highlighted Practices from CPE:

- Reduce “upstream” restrictions on who can propose.
- Avoid burdensome submittal requirements.
- Utilize RFPs to solicit alternatives and innovations.

Open: Encourage and Maximize Competition

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**Future
Webinar**

Open: Encourage and Maximize Competition

Minimum Qualifications for a Design-Build Project:

- Minimum 10 years experience
- At least 10 projects in Design-Build (DB) contracts.
- Experience in working on behalf of both owners and DB contractors.
- Minimum of 5 DB projects in [specific State]
- Must have completed 1 DB project working on behalf of a public owner.
- Have completed 1 DB project that was not new construction, but was a refurbishment, remodel, or addition in a secure operating facility.
- And more... certifications, licenses, etc.
- Who can meet all of these? Did we overly limit our competitive pool?

Open: Encourage and Maximize Competition

Highlighted Practices from CPE:

- Reduce “upstream” restrictions on who can propose.
- **Avoid burdensome submittal requirements.**
- Utilize RFPs to solicit alternatives and innovations.

Future
Webinar

Future
Webinar

Open: Encourage and Maximize Competition

Have you ever...

- Received a proposal that was **50 pages** long? **100+?** **150+?**
- Asked for itemized responses to hundreds (or thousands) of IT requirements?
- Requested evidence of entire safety manuals, training programs, QA/QC protocols, etc.?

Who wants to prepare those? (and can?)

Open: Encourage and Maximize Competition

Highlighted Practices from CPE:

- Reduce “upstream” restrictions on who can propose.
- Avoid burdensome submittal requirements.
- **Utilize RFPs to solicit alternatives and innovations.**

**Future
Webinar**

**Future
Webinar**

Open: Encourage and Maximize Competition

What Percentage of
RFPs, SOWs, and Contracts
Are 100% Accurate?

0%

Open: Encourage and Maximize Competition



Open: Encourage and Maximize Competition



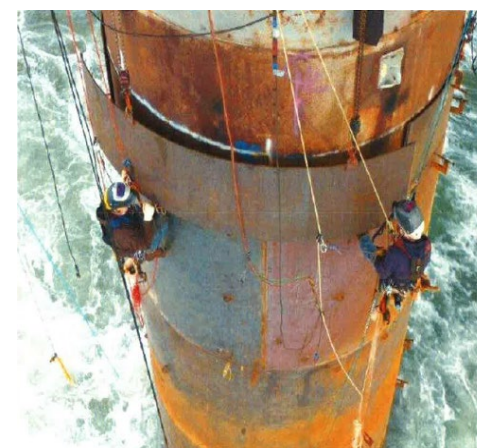
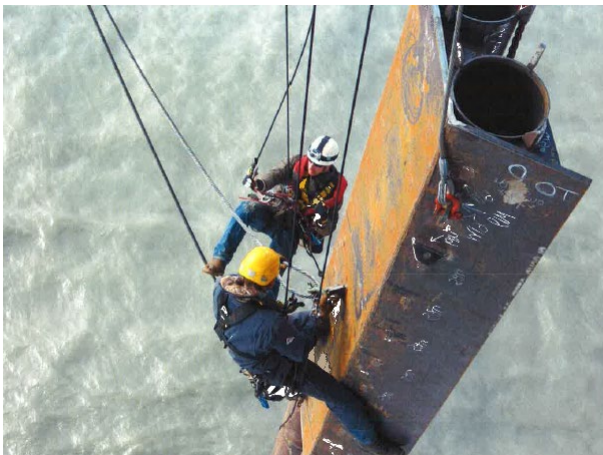
Open: Encourage and Maximize Competition

- Is There Anything You Would Do Differently?
 - If you had complete control of this project
 - If you could change anything

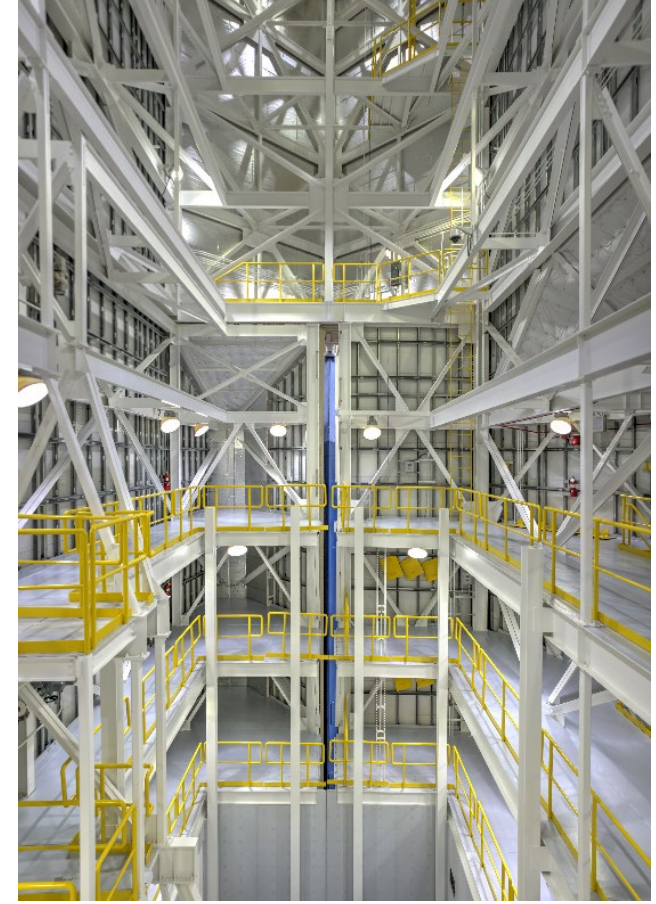


Open: Encourage and Maximize Competition

- The winning Proposer recommended an alternative procedure for removing damaged steel panels that:
 - Was *cheaper* than the specified process
 - Was *faster* than the specified process
 - Was *safer* than the specified process



Open: Encourage and Maximize Competition



Open: Encourage and Maximize Competition

Example from ~2006, which shows how the Software Industry was Evolving in the early 2000's:

- In our experience, the State only requires 50 “Named Licenses” for individuals that will use the system throughout the day.
- We recommend purchasing “Concurrent Licenses” for the remaining 300 staff, who will use the system occasionally. If a user is inactive, the server releases the license to other users (rather than having named licenses for each user).
- This structure can save almost 30% in your overall costs across 5 years. We have done this recently at 4 similar States/Departments and have had no issues or complaints.



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Transparent: Clear, Concise, and Accurate

Highlighted Practices from CPE:

- Clear: release your budget and schedule constraints.
- Concise: define what you want (with maximum limits).
- Accurate: seek to maximize differentiation.

Transparent: Clear, Concise, and Accurate

Highlighted Practices from CPE:

- Clear: release your budget and schedule constraints.
- Concise: define what you want (with maximum limits).
- Accurate: seek to maximize differentiation.



Transparent: Clear, Concise, and Accurate

- **Clear: release your budget and schedule constraints.**
- The Budget & Schedule are important SOW descriptors.
 - Clarifies your scope (what you can afford)
- Clearly define any financial (and schedule) constraints or expectations that you have. Such as:
 - *The construction budget for this Project is \$150,000*
 - *The 5-year implementation + licensing budget is \$2 Million*
- Releasing the Budget & Schedule generates a lot of questions,
→ We will provide a White Paper with the details!

Transparent: Clear, Concise, and Accurate

Highlighted Practices from CPE:

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- Concise: define what you want (with maximum limits).
- Accurate: seek to maximize differentiation.



Transparent: Clear, Concise, and Accurate

Concise: define what you want (with maximum limits).

- Publish your evaluation criteria. Tell vendors what you want to see to make an informed decision.
 - No guessing games!
- Define **maximum page limits** on each written criteria.
- Define **maximum time limits** on oral material (presentations, interviews, demos, etc.)

Transparent: Clear, Concise, and Accurate

Highlighted Practices from CPE:

- Clear: release your budget and schedule constraints.
- Concise: define what you want (with maximum limits)
- Accurate: seek to maximize differentiation.



Transparent: Clear, Concise, and Accurate

Accurate: seek to maximize differentiation.

- Train to use evaluation criteria that best differentiate between the expertise of competing vendors.
- RFPs **are not** meant to solve every project problem.
- RFPs **are** meant to differentiate the best vendor for the project. Always ask: What will help us differentiate?

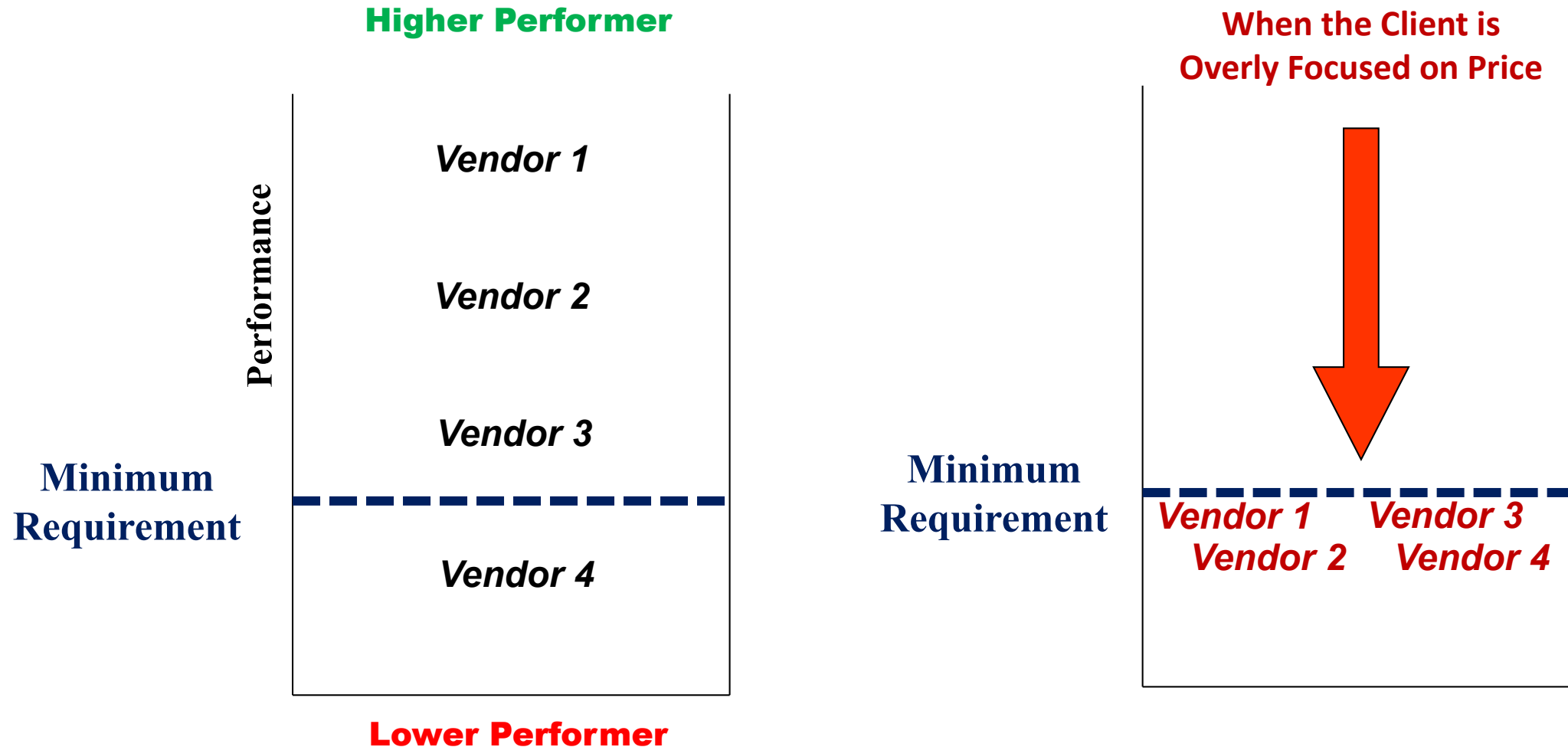
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Value: Optimal Return for the Spend



Value: Optimal Return for the Spend

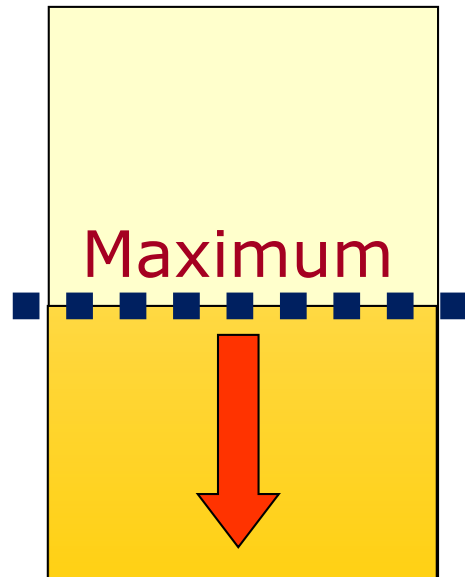
Vendors

“The highest possible value we can competitively sell”

High

Performance

Low



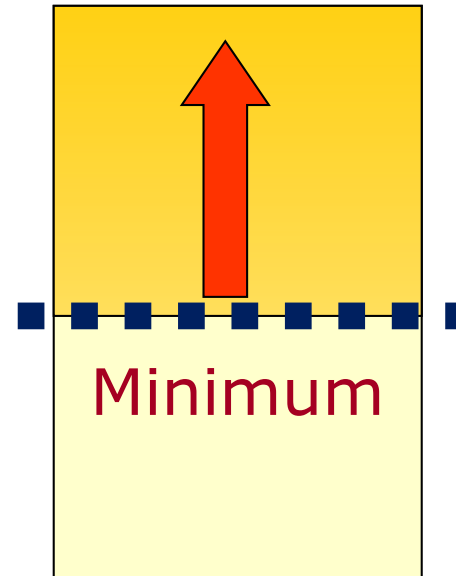
Owners

“The lowest possible quality that I want”

High

Performance

Low



Value: Optimal Return for the Spend



Value: Optimal Return for the Spend

Low-Bid and
Overly Price-Focused RFPs
both squeeze out value
and increase change orders.

Value: Optimal Return for the Spend

What is the
optimal (high-performing)
way to handle Cost?

Value: Optimal Return for the Spend

Highlighted Practices from CPE:

- Appropriately weight the cost and qualifications criteria.
- Keep cost and qualifications completely separate.
- Utilize RFPs to generate project solutions.

Value: Optimal Return for the Spend

Highlighted Practices from CPE:

- **Appropriately weight the cost and qualifications criteria.**
- Keep cost and qualifications completely separate.
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Value: Optimal Return for the Spend

What is the right way to handle cost in an RFP?



- **Policy**: no single criteria weighted above 35% of the total.
 - **And cost should often be much lower!** (10-25% depending on the project)

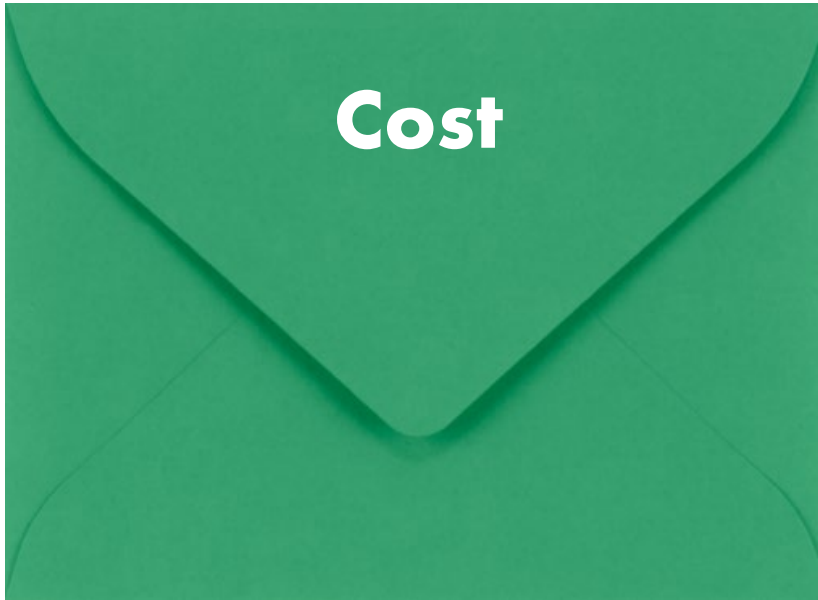
Value: Optimal Return for the Spend

Highlighted Practices from CPE:

- Appropriately weight the cost and qualifications criteria.
- **Keep cost and qualifications completely separate.**
- Utilize RFPs to generate project solutions.

Value: Optimal Return for the Spend

What is the right way to handle cost in an RFP?



- Use a two-envelope evaluation process (evaluators do **NOT** see cost until qualifications have been scored)

Value: Optimal Return for the Spend

What is the right way to handle cost in an RFP?

- Lump Sum
- Unit Rate
- Percent Fee
- Annual Cost
- Implementation Cost
- Travel & Expense
- Etc.



- Use quantitative cost submission forms.
- Don't make Vendors guess. Don't create confusion.

Value: Optimal Return for the Spend

Highlighted Practices from CPE:

- Appropriately weight the cost and qualifications criteria.
- Keep cost and qualifications completely separate.
- **Utilize RFPs to generate project solutions.**

Value: Optimal Return for the Spend



- Proposal #1's Approach

**Will say whatever they think the client
wants to hear in order to get the job**

- Proposal #2's Approach:

**Generic Marketing Information
NOT a Plan**

Value: Optimal Return for the Spend



- **Proposal 3's Approach:**

- Compress design development to quickly produce CDs.
- Award prime contract by Oct 1. Enables excavations to be complete before December holidays and minimizes freeze impacts.
- Mass hoarding of bunker structure to minimize impact of weather.
- Sequencing Considerations: once main floor steel stud framing structure is complete, M&E subs will work on deck level above while additional sub-trades are working on the M&E rough-in and finishing work below. This will reduce schedule time.
- Multiple innovative options to minimize schedule constraints, such as:
 - Alternate interior finishes (switching to a partition system) can reduce critical path schedule by 2+ months (at a +\$1.6M project budget impact)

Value: Optimal Return for the Spend



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- **Integrity:** ensure confidence & trust with high ethical standards.

Integrity: Ensure Confidence and Trust



Integrity: Ensure Confidence and Trust

Highlighted Practices from CPE:

- Train to recognize unethical conduct.
- Minimize the risk of protest.
- Offer comprehensive debriefings.

Integrity: Ensure Confidence and Trust

Highlighted Practices from CPE:

- **Train to recognize unethical conduct.**
- Minimize the risk of protest.
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Integrity: Ensure Confidence and Trust

There is a wide range of possible unethical conduct...

- Conflicts of Interest
- Favoritism
- Special Interests
- Influence
- Confidential Information
- Employment & Revolving Doors
- Financial Interest
- Biased Evaluations
- Group Think
- Gifts
- Lobbying
- Pressure (internal & external)
- Kickbacks
- Misrepresentation

Integrity: Ensure Confidence and Trust

Train to understand
the wide range of
unethical conduct
that can affect RFPs.

Integrity: Ensure Confidence and Trust

**Unethical Conduct can be Actual
and Perceived (or Apparent)**



Integrity: Ensure Confidence and Trust

Train for how to...

Prevent unethical conduct,

Minimize if it starts, and

Elevate if it cannot be navigated.

Integrity: Ensure Confidence and Trust

Highlighted Practices from CPE:

- Train to recognize unethical conduct.
- **Minimize the risk of protest.**
- Offer comprehensive debriefings.

Integrity: Ensure Confidence and Trust



Integrity: Ensure Confidence and Trust

Train for how to...

Avoid the risk of protest altogether

and

Win if an uncontrolled protest happens.

Integrity: Ensure Confidence and Trust

Highlighted Practices from CPE:

- Train to recognize unethical conduct.
- Minimize the risk of protest.
- Offer comprehensive debriefings.

Integrity: Ensure Confidence and Trust

Offer Comprehensive Debriefings to all Vendors:



- Get better proposals next time
- Greater accountability
- Builds “good-will”

Integrity: Ensure Confidence and Trust

Vendors should commonly say:

“Wow, we’ve never received this level of feedback before!”

“We put a lot of time and resources into our proposals and this makes it worth it!”

Integrity: Ensure Confidence and Trust

Future
Webinar

Highlighted Practices from CPE:

- Train to recognize potential unethical practices.
- Minimize the risk of protest.
- Offer comprehensive debriefings.

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Organizing Your Next RFP for Procurement Excellence

Center for Procurement Excellence RFP Templates

RFP

Request for Proposal



Information Technology (IT)
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

Our Goal:

Organize & Simplify
a **High-Performing RFP**
for every Industry Sector
and Project Type



Center for Procurement Excellence RFP Templates

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Why is this Important?

Remember the **Foundations...**

...your RFP is a “first view” for the
Vendor Community and its
structure drives the outcome!



Center for Procurement Excellence RFP Templates

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How to Organize a High-Performing RFP:

- ⚠ • Difficult to determine what to submit?
- ⚠ • Increase the odds of missing a requirement?
- ⚠ • Unreasonable and superfluous requests?
- ⚠ • Necessitate lots of time to review?
- ⚠ • Frustrate vendors?



Center for Procurement Excellence RFP Templates

RFP

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Information Technology (IT)
Software Implementation Template

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How to Organize a High-Performing RFP:

- ✓ • Easy to determine what to submit
- ✓ • Avoid disqualification
- ✓ • Highly organized and professional
- ✓ • Simple and fast for vendors to review
- ✓ • Less frustrating

How we want Vendors to react to our RFP...

I'm so excited.



Ooooh,
I ♥ CPE's
RFP Templates!



Organizing a High-Performing RFP

RFP

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Information Technology (IT)
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Organizing a High-Performing RFP

RFP

Request for Proposal



Information Technology (IT)
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RFP Number: #####

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RFP Due Date: MM/DD/YYYY

1

Administrative
Requirements

2

Statement of Work
& Current Conditions

3

Proposal
Requirements

4

Evaluation
Procedures

5

Submittal Forms

6

Attachments
& Exhibits

Organizing a High-Performing RFP

RFP

Request for Proposal



Information Technology (IT)
Software Implementation Template

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1

Administrative
Requirements

General Instructions, Dates & Contact

2

Statement of Work
& Current Conditions

3

Proposal
Requirements

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Organizing a High-Performing RFP

RFP

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RFP Due Date: MM/DD/YYYY

1

Administrative
Requirements

2

Statement of Work
& Current Conditions

What You Want to Achieve
vs. Where You Are At

3

Proposal
Requirements

4

Evaluation
Procedures

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& Exhibits

Organizing a High-Performing RFP

RFP

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Information Technology (IT)
Software Implementation Template

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Administrative
Requirements

2

Statement of Work
& Current Conditions

3

Proposal
Requirements

4

Evaluation
Procedures

5

Submittal Forms

6

Attachments
& Exhibits

What Will Be Evaluated and
How You Will Score & Award



Organizing a High-Performing RFP

RFP

Request for Proposal



Information Technology (IT)
Software Implementation Template

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RFP Release Date: MM/DD/YYYY

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1

Administrative
Requirements

2

Statement of Work
& Current Conditions

3

Proposal
Requirements

4

Evaluation
Procedures

5

Submittal Forms

Forms to Complete

6

Attachments
& Exhibits

Organizing a High-Performing RFP

RFP

Request for Proposal



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Software Implementation Template

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Statement of Work
& Current Conditions

3

Proposal
Requirements

4

Evaluation
Procedures

5

Submittal Forms

6

Attachments
& Exhibits

Supplemental Information



Organizing a High-Performing RFP

RFP

Request for Proposal



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Software Implementation Template

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Administrative
Requirements

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Statement of Work
& Current Conditions

3

Proposal
Requirements

4

Evaluation
Procedures

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Submittal Forms

6

Attachments
& Exhibits

Common Mistake: Mixing Sections

RFP

Request for Proposal



Information Technology (IT)
Software Implementation Template

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Administrative
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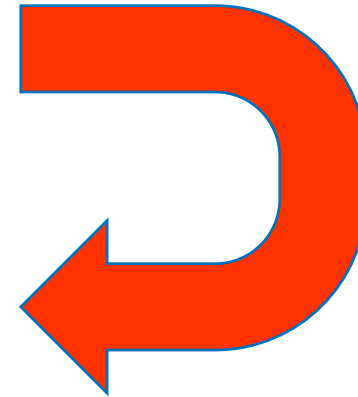
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What can we do
to move procurement
into warp speed?

Common Mistake: Mixing Requirements



4.4 GOALS

The property adjacent to the Campbell Reservoir #2, has been identified for the Campbell Sedimentation Plant. The location provides access to the City system for pretreatment that is downstream of North Thomas Reservoir. An additional water source, State Water Project East Project (SWP-E), is anticipated to be accessible upon successful completion and permitted demonstration of the Grant Pump Station, which will pump SWP-E into the City upstream of the Campbell Reservoir #2.

Campbell Reservoir #2 was constructed in 1982 and is fully lined with asphalt. The lining has not been replaced since its construction and has deteriorated to the extent that maintenance of the reservoir has become difficult. The identified and targeted contaminant concentrations for CITY source water are below:

Arsenic

- Ranges: 10 µg/L to 85 µg/L
- Dates: Dec. 2011 – Jan. 2018

Turbidity

- Ranges: 0.5 NTU to 67 NTU
- Dates: Dec. 2011 – Jan. 2018

Total Organic Carbons

- Ranges: 2.3 µg/L to 4.2 µg/L
- Dates: Oct. 2016, May 2017

In the response, the Proposer shall identify the form of business (i.e., individual, sole proprietor, corporation, non-profit corporation, partnership, limited liability company) and business location (physical location or domicile). The Proposer should identify how they will meet these goals.

**Mixing Proposal & SOW
Requirements
throughout the Document
(e.g. Proposal Requirements
embedded in the SOW)**



Common Mistake: Duplication



REQUEST FOR PROPOSALS

FOR CONSTRUCTION MANAGER AT RISK SERVICES FOR THE MIAMI BEACH CONVENTION CENTER RENOVATION AND EXPANSION PROJECT

RFP No. 2015-129-ME

RFP ISSUANCE DATE: MARCH 11, 2015

PRE-PROPOSAL MEETING DATE: MARCH 19, 2015 AT 2:00 PM LOCAL TIME

PROPOSAL DUE DATE: APRIL 9, 2015 AT 3:00 PM LOCAL TIME

ISSUED BY:

MIAMIBEACH

Maria Estevez, Assistant Director
DEPARTMENT OF PROCUREMENT MANAGEMENT
1700 Convention Center Drive, Miami Beach, FL 33139
305.673.7000 x 7490 | MariaEstevez@miamibeachfl.gov
www.miamibeachfl.gov

majority of the MBCC renovation completed.

- l) By the fall of 2018, the Project must be complete.

The dates set forth above for completion of design packages are being verified by Fentress and are subject to change.

8. **Anticipated RFP Timetable.** The tentative schedule for this solicitation is as follows:

Issuance of RFP	March 2, 2015
Pre-Submittal Meeting	March 19, 2015 at 2:00 pm local time
Deadline for Receipt of Questions	March 30, 2015 at 5:00 pm local time
Proposal Due	April 9, 2015 at 3:00 pm local time
Evaluation Committee Meeting	April 16, 2015
City Commission Approval Selection	April 29, 2015

9. The City reserves the right to postpone the date for receipt and opening of proposals and will make a reasonable effort to give at least five (5) calendar days written notice of any such postponement to each prospective proposer.

10. **Proposal Submission:** One (1) unbound original proposal, 20 copies, and one electronic PDF (in one file) on a flash drive or CD must be received on or before the date stipulated in the **Anticipated RFP Timetable** section. The original proposal and all copies must be submitted to the Department of Procurement Management in a sealed envelope or container stating on the outside, the Proposer's name, address, telephone number, RFP number, title, and due date. Any proposals received after time and date specified will be returned to the Proposer unopened. The responsibility for submitting a proposal before the stated time and date is solely and strictly the responsibility of the Proposer. The City is not responsible for delays caused by mail, courier service, traffic, weather or any other occurrence.

11. **Pre-Proposal Conference:** A Pre-Proposal Conference will be held on the date and time specified in the **Anticipated RFP Timetable** section. The pre-proposal conference will be held at a location to be determined location (issued via addendum). Attendance (in person or via telephone) to this meeting is not mandatory but strongly encouraged. Proposers interested in participating in the meeting via a webinar can log into Web Address: <https://global.gotomeeting.com/join/882827709>; Dial +1 (872) 240-3212; Access Code: 882-827-709.

12. **Procurement Contact:** Any questions or clarifications concerning this solicitation shall be submitted to Maria Estevez, 305-673-7490, mestevez@miamibeachfl.gov via email or in writing, with a copy to the City Clerk's Office, Rafael E. Granado via e-mail: RafaelGranado@miamibeachfl.gov, or facsimile: 786-394-4188. The RFP title/number shall be referenced on all correspondence. All questions or requests for clarification must be received no later than the date and time in the **Anticipated RFP Timetable** section. All responses to questions/clarifications will be sent to all prospective Proposers in the form of an addendum.

13. **Documents.** All documents released in connection with this RFP, including all appendices and addenda, whether included herein or released under separate cover, comprise the solicitation, and are



MIAMIBEACH

City of Miami Beach, 1700 Convention Center Drive, Miami Beach, Florida 33139,
www.miamibeachfl.gov
DEPARTMENT OF PROCUREMENT MANAGEMENT
Tel: 305.673.7490, Fax: 786.394.4006

PUBLIC NOTICE

REQUEST FOR PROPOSALS (RFP) No. 2015-129-ME (the "RFP") FOR CONSTRUCTION MANAGER AT RISK SERVICES FOR THE MIAMI BEACH CONVENTION CENTER RENOVATION AND EXPANSION PROJECT Miami Beach, Florida

The City is seeking proposals from capable construction managers interested in submitting a proposal for Construction Manager At-Risk services for the Miami Beach Convention Center Renovation and Expansion Project (as hereinafter defined), which, among other things, includes: 1) the complete renovation of the Miami Beach Convention Center ("MBCC" or "Convention Center") with an expansion of a ballroom and auxiliary spaces; 2) parking above portions of the Convention Center; 3) exterior landscaping improvements and a 6.5 acre public park; and 4) a renovation of Convention Center Drive, including relocation of utilities.

A Non-Mandatory Pre-Proposal Conference is scheduled for **March 19, 2015 at 2:00 pm** local time at the following location:

To be determined - Addendum will be issued with location.

Attendance (in person or via telephone) to this meeting is **not mandatory but strongly encouraged**. Proposers interested in participating in the meeting via telephone must follow these steps:

Web Address: <https://global.gotomeeting.com/join/882827709>

To join the conference call:
Dial +1 (872) 240-3212
Access Code: 882-827-709

Sealed proposals in response to this RFP must be received by the City of Miami Beach Department of Procurement Management, 3rd Floor, 1700 Convention Center Drive, Miami Beach, Florida 33139, by **April 9, 2015 at 3:00 pm** local time.

- a) On February 11, 2015, Fentress was authorized to proceed with completion of design development and all technical and other drawings, shop drawings, schedules, diagrams, and specifications, setting forth in detail the requirements for the construction of the Project ("Construction Documents" or "CDs").

- b) On or about April 29, 2015, it is anticipated that the City Commission will consider the selection of the CMR.

- c) On or about May 20, 2015, it is anticipated that the City Commission will consider a CMR contract to, among other things, fix the CMR's fee and provide for CMR services through the proposed date for establishing a GMP amendment (on or about October 31, 2015).

- d) On or about May 20, 2015 the Construction Documents for an early demolition of certain structures on the north side of the MBCC and site work package for a portion of the Project are to be completed, to permit the CMR to bid the package, obtain all appropriate permits, and enable demolition and site work to begin in the areas north of the MBCC on or about October 1, 2015.

- e) On or about September 15, 2015, Fentress will produce Construction Documents (anticipated to be approximately 65-75% complete) for the purposes of establishing the GMP. These CD packages will be provided to the CMR, Fentress's cost estimator, and the City's cost estimator.

- f) On or about September 15, 2015 the CDs for the foundations, structure and building enclosure package are to be completed to enable bidding and permitting for a December 10, 2015 commencement of construction, following the conclusion of the December 4-7, 2015 Art Basel events scheduled to take place at the Convention Center.

- g) On or about September 30, 2015 the CMR will propose its GMP. Such GMP will include the estimate for all trade costs, general conditions, bonds & insurance, a 5% bidding contingency, a 6.75% escalation contingency, and the CMR fee. **The GMP cannot exceed the Project Construction Budget of \$471.9 million.**

- h) Provided the City's budget and design objectives are met, on or about October 15, 2015, the City Commission will consider approval of an amendment to the CMR contract incorporating the GMP. If the Project is completed within or at the GMP, any bid buy-out savings realized through the bidding and construction process shall be shared at the conclusion of the Project, with 75% retained by the City and 25% paid to the CMR as an additional fee.

- i) On or about December 10, 2015, Phase I of the construction shall commence.

- j) On or about November 20, 2016, the MBCC will reopen for Art Basel, and 100% of the MBCC exhibit halls and other spaces within the MBCC must be made available for this event (partially renovated and partially in existing condition).

- k) On or about November 20, 2017, the MBCC will reopen for Art Basel, and 100% of the MBCC exhibit hall renovations must be complete, the north junior ballroom must be complete, and the

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- Questions & Inquiries
- Addenda
- **Procurement AND Evaluation Schedule**
- **Single Point of Contact**
- **Method of Submission**
- General Terms
 - Ethics
 - Expenses
 - Rights & Disclaimers
 - Confidentiality
 - **Debriefings**
 - Etc.

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Strategies, Structure,
Content, Workshops

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What Will Be Evaluated and
How You Will Score & Award

Proposal Requirements

- Provide brief, clear instructions of what you are looking for (what information & content you want to evaluate)
- Refer Vendors to the corresponding Proposal Forms.
- Keep it brief. Define Maximum Page Limits.



Evaluation Procedures: Publish Your Weights, Scoring, and Award Steps

- Release a table of your evaluation criteria & weights
- Identify your evaluation scale.
- Be clear about how Cost will be treated (two envelope)



Evaluation Procedures: Interviews, not Marketing Presentations

- **Focus on the Critical Project Team Members**
 - Project Lead & Integration Lead
 - Project Manager & Site Superintendent
 - Lead Designer & Lead Architect
 - Area Director & On-Site Manager
 - Etc.
- **Conduct an actual ‘interview’ (not presentation)**
- **Minimal notes, handouts, or presentation material**

Evaluation Procedures: Product Verifications, not Marketing Demos

- **Focus on Verifying the Requirements / Performance / Functionality You Need.**
- **Insist on viewing an actual, working product/system that is identical to what you would be buying.**
 - or as close to it as possible
- **Moderate Time Limit**
 - not trying to see everything, just trying to make a selection

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Forms to Complete

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Take Charge: Client-Defined Proposal Forms!!!

- **Know what you are looking for... and ask for it!!!**
- **Eliminate all other marketing fluff. It does not add value.**
- **Make it easy!!!**
- **RFPs can be large documents.**
- **Vendors only have so much time to spend!**

Take Charge: Client-Defined Submittal Forms!!!

SUBMITTAL FORM C-2

Experience (Critical Project Team Members)

Instructions: Refer to Section 3.2 for format requirements. Proposers are asked to provide a brief resume and description of roles & responsibilities for each Critical Project Team Member identified in the proposal. All resumes must be required to be anonymous. The only requirement is a 2 page maximum.

Insert Critical Project Team Member Role	Insert Individual
Anticipated Time Allocation to the Project	Insert Description

Brief Narrative of Roles and Responsibilities:

Insert (add space as needed)

Resume

Insert (add space as needed)

SUBMITTAL FORM B

Experience & Qualifications

Software Company Experience

Provide information regarding the experience of the Software Company. The information below must ONLY apply to the current version of the Software Solution being proposed **and** which your Software Company has performed over the past five years. Only solutions that are 100% complete and operational can be counted (on-going or in-progress implementations **cannot** be counted in this analysis).

software solution	<input type="checkbox"/> 0 <input type="checkbox"/> 1-4 <input type="checkbox"/> 5-9 <input type="checkbox"/> 10-19 <input type="checkbox"/> 20+
tual fund industry e purchased the	<input type="checkbox"/> 0 <input type="checkbox"/> 1-4 <input type="checkbox"/> 5-9 <input type="checkbox"/> 10-19 <input type="checkbox"/> 20+

itation Company. The information below must be being proposed and which the Implementation actions that are 100% complete and the system is actions cannot be counted in this analysis).

	<input type="checkbox"/> 0 <input type="checkbox"/> 1-4 <input type="checkbox"/> 5-9 <input type="checkbox"/> 10-19 <input type="checkbox"/> 20+
mutual fund industry have purchased the	<input type="checkbox"/> 0 <input type="checkbox"/> 1-4 <input type="checkbox"/> 5-9 <input type="checkbox"/> 10-19 <input type="checkbox"/> 20+

Team Members proposed in Submittal Form A:

Project Manager	Solution Architect	Func./Bus. Lead	Tech./Data Lead

managed/led in current role	
-----------------------------	--

4) Number of clients in the brokerage, asset management, or mutual fund industry (or other industries similarly regulated by Finra/SEC) the individual has implemented solutions for (#)

5) Number of implementations the individual has managed/led using the same software product & version being proposed (#)

What can we do
to move procurement
into **warp speed**?

Example from Public-Private-Partnership Design-Build-Finance Project

Example from Software Implementation Project

Common Blunder: Mixing Requirements



3.8 Method of Operation

3.8.1 The Contractor should be able to provide the recommended items that are listed in Attachment 1 of this RFP. Additional and/or comparable products should also be offered.

3.8.2 UH has the option of selecting any Grab-and-Go items from the recommended listed items (see Attachment 1). The selection of Grab-and-Go items and quantities will vary based on UH volume of sales and customer requests. If Contractor no longer offers a product listed in this RFP, Contractor shall notify UH and provide a comparable alternative.

3.8.3 The Contractor and the Department of Food and Nutrition Services will monitor together the volume and sales of the Grab-and-Go items and determine from the recommended list which items will be offered for sale in the UH cafeteria (and possibly other locations at UH).

3.8.4 The Contractor must provide an invoice for every order to the Department of Food and Nutrition Services and the Department of Accounts Payable. All invoices must include the UH Purchase Order Number.

3.8.5 The Contractor must provide, upon request of the Department of Food and Nutrition Services, weekly, monthly or yearly reports of all the Grab-and-Go items that were purchased including quantity and pricing.

WE HAVE READ AND SHALL FULFILL THE REQUIREMENTS OF SECTION 3.8

The bidder must indicate by putting a check mark in the appropriate box marked

____Y (Yes) ____N (No).

**Avoid fill-in-the-blanks
throughout
other sections of the RFP.**

**Keep everything in the
Submittal Forms**

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Supplemental Information



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Additional Information that
may be helpful to Vendors.

But don't want to "clog up"
the other sections.

Supplemental Information



Attachments & Exhibits

- **Examples of Supplemental Information (IT Software):**

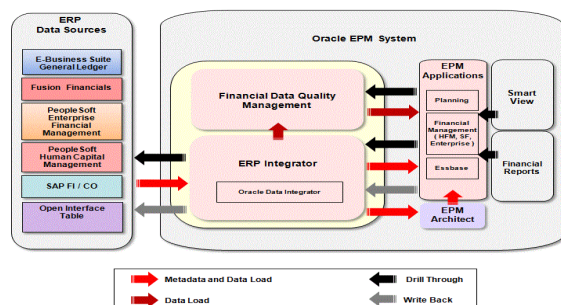
List of Pain Points

Use Cases

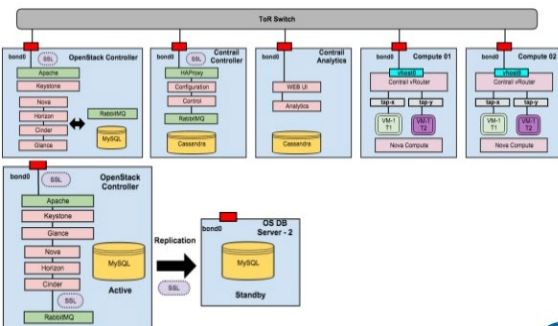
Workflows

Architecture Diagrams

Current State:



Future State:



Dashboards & Forms

FIGURE 3: CASHFLOW CONTD.

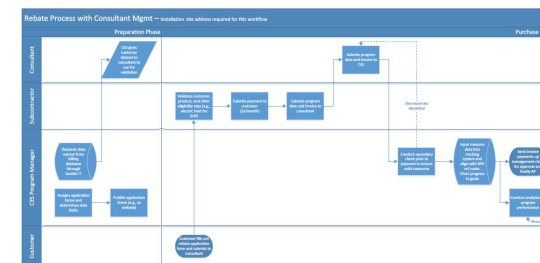
What can we do
to move procurement
into **warp speed**?

	3 QTR 2017	3 QTR 2017	4 QTR 2017	1 QTR 2018	2 QTR 2018
-	50,000	600,000	324,000	-	-
-	-	25,000	-	-	-
-	50,000	100,000	-	-	-
-	-	-	-	-	-
-	-	-	-	-	-
-	-	-	-	-	-
-	-	-	-	-	-
-	-	-	-	-	-
-	-	-	-	-	-
440,498	-	-	-	-	-
5,504,278	4,800,000	2,600,000	2,900,000	1	1
225,000	550,000	400,000	460,000	-	-
-	-	-	-	-	-
-	-	-	-	-	-
-	-	-	-	-	-
6,169,776	5,450,000	3,785,000	3,684,000	2	2
50,624,143	45,174,143	41,389,143	37,705,143	35	35
				43,889,143	40,205,143

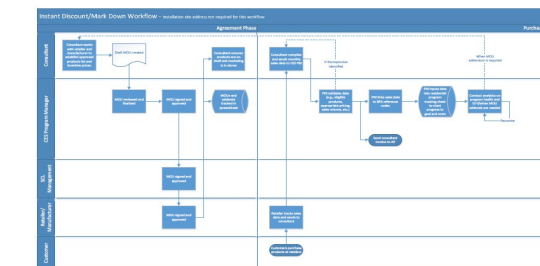
Glossary of

		Advanced Metering Infrastructure (AMI) used by homes and businesses to use information. The meters will communication between the meter and the utility.
		Average Megawatt. One megawatt is 1,000 kilowatts (8,760 megawatt hours)
		Agreements & Rebate Processing Solutions work group that tracks agreements, and contracts.
	Baseline	Within Conservation Field Operations energy conservation are assessed what will be done with funding (if) be done without funding (if) the "baseline" for example, the baseline is the Energy Code.
		Business Customer Database. Our understanding non-residential database. It is a data output file ability to easily search, view, and data.
		Bonneville Power Administration agency that administers conservation Northwest.
	CATS	Conservation Acquisition Tracking tracking system used by the Snohomish Common Area Lighting, and Municipal programs. Contains historical data.
	CCB	Customer Care & Billing system Seattle City Light
	CCSS	Consolidated Customer Service system used by Seattle City Light
	CES	Customer Energy Solutions. The responsible for assisting customers efficiency projects within their facilities.

Rebate Workflow:



Discount Workflow:



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Putting “RFP Excellence” into Practice

Putting RFP Excellence Into Practice

- Fair
- Open
- Transparent
- Value
- Integrity

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Putting RFP Excellence Into Practice

- Fair
- Open
- Transparent
- Value
- Integrity

Strategic Objective:

Become a “**Client of Choice**”
and attract
High-Performing Vendors
across your RFPs

Putting RFP Excellence Into Practice

- Major tool in becoming a Client of Choice.
- Instrumental to successful project outcomes.
- Learnable skills that can be put directly into practice.
- Part of a network of professionals that openly share “Next Practices” (not just current practices)

Putting RFP Excellence Into Practice

CPE support RFP Excellence via...

- **Webinars & Professional Development**
- **In-Person Training & Interactive Workshops**
- **RFP Tools, Templates, and Process Steps**
- **Policy Guidelines for RFP Excellence**

Recent Design & Construction RFPs

- \$250M Hazardous Waste Removal
- \$100M Office Building
- \$1.5B Mainline / Trunkline (100+ projects, 6-10 yrs)
- \$400M+ Groundwater Treatment
- \$50M Hotel
- \$30M Smart Grid Consultants & OCM
- \$30M Smart Grid Change Management
- \$900M Smart Grid/Meter Replacement (1.5M Electric/700 Water)
- \$3.1M Design for \$60M Turbine Replacement
- \$400K Design + \$2.5M Solar Microgrid
- \$3M Automated Metering OCM
- \$500k On-Call Distribution Engineering Design
- \$1.5M Hydro-Generating Station Re-Licensing
- \$XXB+ Tech Site
- \$20M Public-Private Partnership for Student Housing
- \$3M Electrical Substations (x2)
- Construction Mgmt List / VOR Program
- \$1.2M COR Program/Audit
- \$16M Police Facility (Design & CMAR RFPs)
- \$7M Public Works Field Operations Facility
- \$5M Environmental Site Rehabilitation
- \$1.2M Capital Project
- \$250k Engineering Analysis of Utility Distribution Network
- \$1.2M Annual Audit Consultant
- \$10M+ City-wide Parks Program
- \$1.5M Construction Project Mgmt Software
- \$600k Remedial Investigation (Marina)
- \$20M Residence Hall (Design-Build)
- \$5M+ Wireless Telecom (City-wide upgrade to 5G)

Current/Recent Services RFPs

- Dining (Multiple) (\$150k - \$1.2B)
- Cold Beverages (\$2-\$5M)
- Document Mgt/Printing (\$2.5M-\$4M)
- Bookstore (\$650M)
- Travel Management (\$15M-\$50M)
- Campus Network (\$52M)
- Identity Access Management System (\$2M)
- Retirement Fund Management (\$248M)
- Athletics Financial IT System (\$3M)
- Recycling & Waste Management (\$900k)
- Janitorial (\$25M)
- Security Services (\$25M)
- Peoplesoft HR, Financial, etc. (approx. \$850k per system)
- Security System IT (\$5M)
- Library System Master Plan (\$400k)
- Gym Equipment (\$250k)
- Sports Marketing (\$80M)
- Furniture (\$50K-\$20M)
- Construction Services Program (\$50K - \$30M)
- Parking Management System (Tech & IT) (\$2M)
- Elevator Maintenance (\$1.5M)
- Snow Removal (\$400K)
- Transportation Services (Athletics) (\$300k)
- Linen, Moving, IT Consultants, Finance Controls, Master Planning, Renovations, Pcard System, etc.

Recent IT (software/hardware) RFPs

- Telecom System - Wire Telephony, Data Network, Video Conferencing & End User Support (\$35M)
- System Integrator for Generation Enterprise Asset Management (\$25M+)
- Telecom Management Solution (\$1.5M)
- Peoplesoft HR, Financial, etc. (\$850k per system)
- ERP public sector org (\$34M to \$85M)
- ERP private sector org (\$4M+)
- Human Resources Management System (HCMS) (\$4M+)
- GIS-Based Asset and Work Management Software and Implementation Services (\$600k)
- DMV Legacy System Replacement (\$25M)
- Campus Network (\$52M)
- Identity & Access Management Solution (\$1M)
- Radio System Upgrade (\$1.5M)
- Capital Project Management System (\$700k)
- Electronic Call Monitoring System & Call Center Replacement
- PCB Tracking & Condition Assessment System (\$1M+)
- System Integrator for ERP (\$75M+)
- Snow Plow Mobile Data Collection (\$2M)
- Housing Management System (\$200k)
- IT Monitoring Solution (\$100k)
- Wireless Network – Residences (\$400k)
- CRM Solution (\$1M)
- eCourse Evaluation Solution (\$400k)
- EDRM Solution (\$500k), ePAR People Soft (\$600k)
- Asset Management System (\$300k)
- ITS Central Control System (\$700k)
- Recreation Management System (\$600k)
- Mobility Management and Administration System (\$700k)
- Enterprise Document Records & Mgmt System
- Demand-Side Management Software (\$1.5M+)
- Building Analytics Software (\$1.5M+)
- Anti-Money Laundering (AML) System (\$2M+)
- Organizational Change Management for Software Adoption (*multiple*)

CPE Document Warehouse

General Construction
Construction Manager @ Risk (CMAR)
Roofing
Food Services Management and Operation

Don't see the one you want? Contact us!

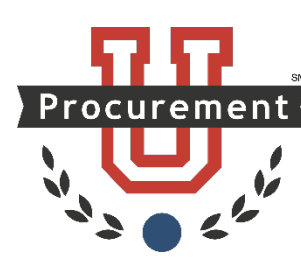
Jeff.Sawyer@center4procurement.org

Thank You!

Center for Procurement Excellence



www.center4procurement.org



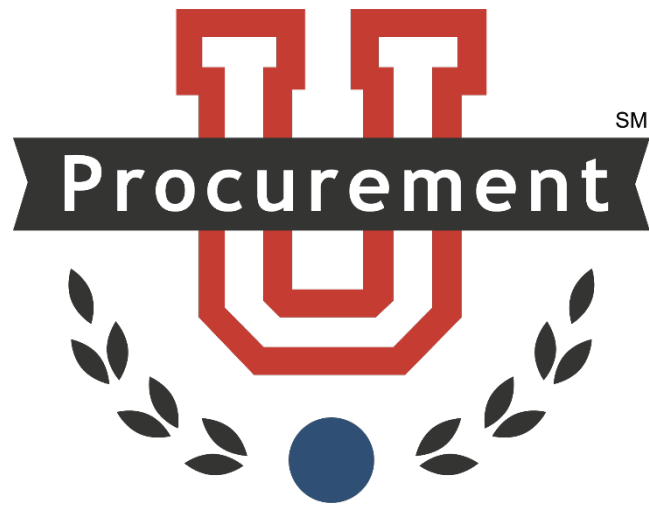
Upcoming Workshop Series

Better RFPs, Better Projects

Learn Practical Tools to Improve Your Next RFP

August 17, 24, and 27

- Develop an effective Statement of Work
- Elevate your RFP practices to become a "Client of Choice"
- Implement practical RFP tools, templates, and structure
- Improve the speed & efficiency of your Evaluation Process



Thank you!

- Need a certificate for contact hours?
Email us at procurementu@naspo.org.
- For more information about upcoming webinars and Procurement U Classes, visit www.naspo.org.