FREE Webinar Series!

3rd Thursdays every month @ 12pm Central

AGENDA

15min Teaching Moment

(learn a new tip, trick, or tool)

30min Virtual Peer Group

(network with professionals)

Office Hours

(open Q&A until the questions run out!)

CPE | Center for Procurement Excellence

ASK the RFP + Doctor

center4procurement.org/rfp-doctor

Center for Procurement Excellence (CPE)

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

MISSION
Improve effectiveness of RFPs for public and private organizations worldwide
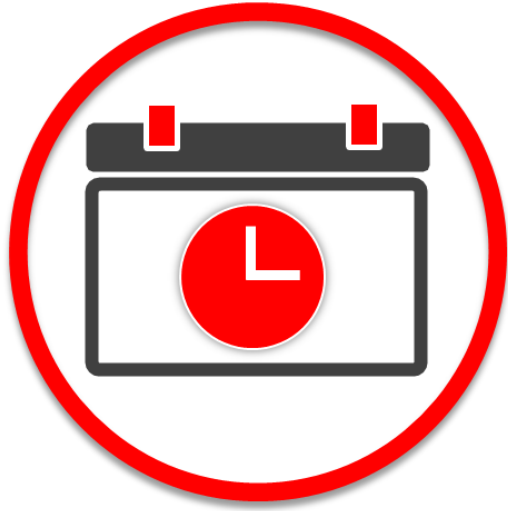
GOAL
RFPs that emphasize the CPE Principles of

Fair, Open, Transparent, Value, and Integrity

RESOURCES
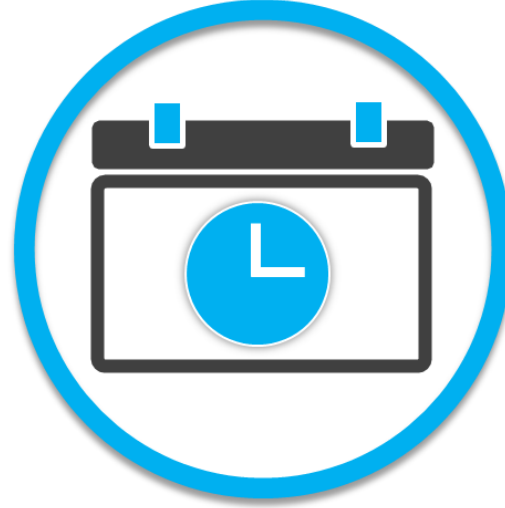Professional Development Training, RFP Templates, Advocacy

RFP Scheduling
Tips & Challenges

Project / Service
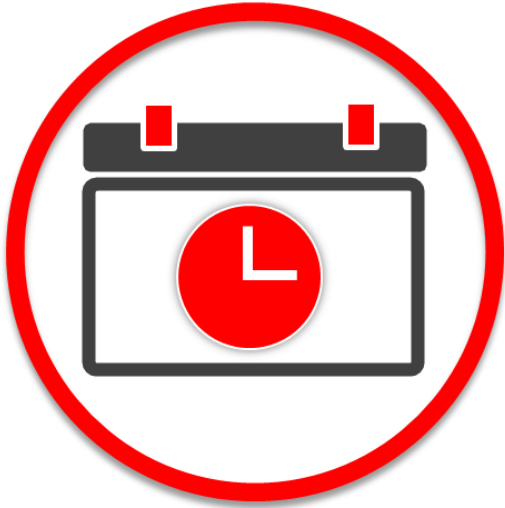
Project / Service   **Procurement**
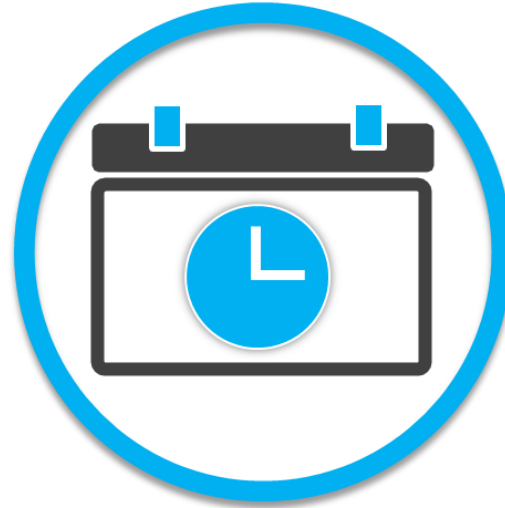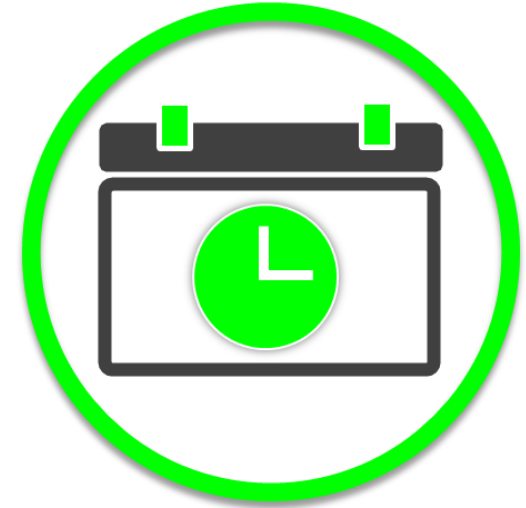
Project / Service   **Procurement**   **Internal**

Project / Service Schedule
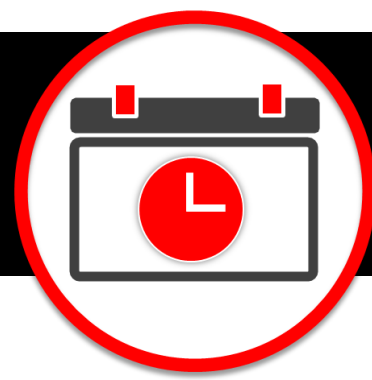
Project / Service Schedule
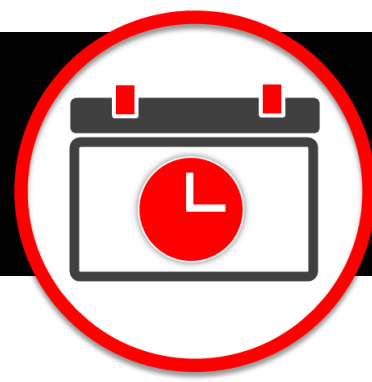
- **Identifies the critical dates that are related to the project itself.**

Procurement Schedule

- **Communicate to the Vendors the critical procurement timelines**

- **Activities & topics related to the procurement process**

1) Planning Phase

Plan & prepare for the start of the formal RFP Process

- **Needs Assessment**
- **Business Case**
- **Funding & Budgets**

- **Approvals**
- **Contract Strategy**
- **Market Analysis**

Schedule Activities
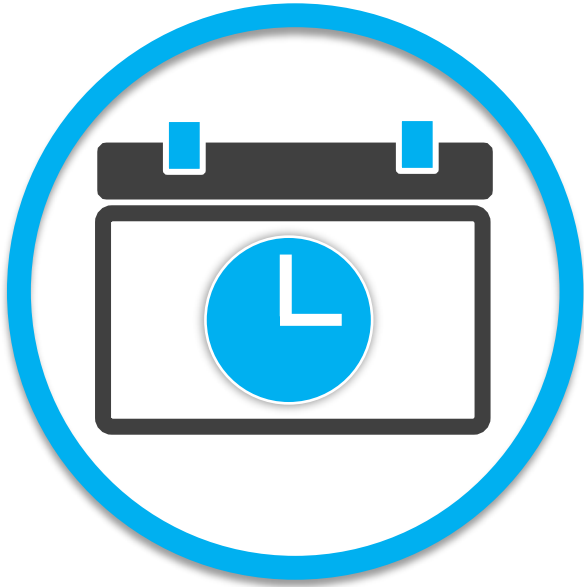
Schedule Activities

Procurement Activities	
1	**Advertise / Issue the RFP**

Schedule Activities

Procurement Activities	
1	**Advertise / Issue the RFP**
2	**Proposal Due Date**

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Schedule Activities

Procurement Activities	
1	**Advertise / Issue the RFP**
2	**Proposal Due Date**
3	**Award Date**

Advertisement Period

Procurement Activities

1 **Advertise / Issue the RFP**
- Pre-Proposal Meeting
- Site Walk
- Deadline to Submit Questions

2 **Proposal Due Date**

3 **Award Date**

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Advertisement Period

Procurement Activities

1 **Advertise / Issue the RFP**
- Pre-Proposal Meeting
- Site Walk
- Deadline to Submit Questions

2 **Proposal Due Date**

4-6 Weeks

3 Award Date

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Advertising Period

Procurement Activities

1 **Advertise / Issue the RFP**
- **Pre-Proposal Meeting**
- **Site Walk**
- **Deadline to Submit Questions**

2 **Proposal Due Date**

3 **Award Date**

Issuing Your RFP

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- **Also called 'posting' or 'advertising'**

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- **Informs your Vendor community about your project/service need**

Issuing Your RFP

- **Also called 'posting' or 'advertising'**

- **Informs your Vendor community about your project/service need**

- **Vendors can then review your solicitation and begin their formal response**

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How Do Owners Advertise

WALL STREET JOURNAL EUROPE

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MONDAY, JUNE 17, 1996

Markets Sur

What's News—

FINANCIAL TIMES

Lucy Kellaway

Today's surveys
Vietnam; Devon
and Cornwall

Media futures
Rattling the phone
companies

MONDE. Syrie-Turquie
Tension entre
Damas et
Ankara
La Turquie et la Syrie
ont procédé à des
mouvements de
troupes le long de leur
frontière commune.
Cette crise survient
après la signature d'un accord militaire
entre Tel-Aviv et Ankara, qui ne ménage
pas ses critiques à l'égard du régime d'Ha-
fez el-Assad (ci-dessus à gauche). Page 8

FRANCE. Deux-Sèvres
Le Marais
poitevin vidé
de ses

Libération

Tiberi a

Le Monde
des
INITIATIVES

DEMAIN
DANS
INITIATIVES
EMPLOI
Les premiers pas
dans la vie active

ANNONCES CLASSÉES
de la page V à la page XII

Horst Stern: Reise durch ostdeutsche Landschaften (Seite 6

DIE ZEIT
WOCHENZEITUNG FÜR POLITIK · WIRTSCHAFT · HANDEL UND KULTUR

Tea
amo!

21. Juni 1996, 51. Jahrgang

Frankfurter Allgemeine
ZEITUNG FÜR DEUTSCHLAND

Müller-Vogg, Günther Nonnenmacher, Johann Georg Reißmüller, Frank Schirrmacher

Kreml-Intrigen

INTERNATIONAL
Herald Tribune

PUBLISHED WITH THE NEW YORK TIMES AND THE WASHINGTON POST

Paris, Friday, June 21, 1996

Yeltsin Dismisses Hard-L

Russie : un général arbitre du second tou

La Tribune

QUOTIDIEN ■ MARDI 18 JUIN 1996

DESFOSS

Paris CAC 40
+ 0,06 %

New York DJ
- 0,08 %

Dollar Paris
5,1535 FF

POUR ÉVI

LOS ANGELES

Update on coronavirus | 311 City Services | LA City Directory

LABAVN | Los Angeles Business Assistance Virtual Network

HOME   SEARCH   REGISTER   LOGIN   SUPPORT   Ask Chip

| Opportunities | Subcontractors |

Search Results

Here are 31 current bid opportunites based on your search parameters.

Displaying 1 - 31 of 31 records

NO.	DEPARTMENT AND OPPORTUNITY	ID	POSTED	BID DUE	STATUS
1.	Harbor Department, Port of Los Angeles Administrative Coordinator	39594	04/15/20	04/22/20	Open
2.	Housing Authority, City of Los Angeles Legal Services	39568	04/10/20	05/13/20	Amended
3.	Police Canine Veterinary Services for the Los Angeles Police Department	39539	04/09/20	05/21/20	Open
4.	Water & Power RECEIVING WATER MONITORING SERVICES	39529	04/02/20	05/08/20	Amended
5.	Public Works, Board Offices of Director, Office of Community Beautification	39501	03/28/20	05/08/20	Open
6.	Water & Power RFQ 90540 "RFQ AS-NEEDED ENGINEERING AND ARCHITECTURAL DESIGN SERVICES"	39493	03/26/20	05/06/20	Amended

12:58 PM
4/21/2020

NYC
Mayor's Office of
Contract Services

Italiano ▶ Translate | ▼   Text-Size

🏠 | About | **Contract with NYC** | Resources | M/WBE | Nonprofits   Search 🔍

Opportunities | **Vendors** | **Franchises/Concessions** | **Labor Compliance**

City Record

Procurement Plans

Contracting Agencies

[f] [t] [g+] [t] [✉] Share

🖨 Print

Contracting Opportunities

The first action a new vendor should take to do business with the City of New York is **register in the Payee Information Portal (PIP)**, which will enroll them onto the City's Bidders' Lists based on commodity code selections. By being on a City Bidder List, a vendor may receive notices about solicitations, including those not advertised elsewhere.

There are multiple ways to find out about procurement opportunities:

- All City solicitations valued above $100,000 are advertised in **The City Record On-Line** (CROL).
- Many contracting agencies also list their current, as well as upcoming, bid solicitations and Requests for Proposal (RFPs) on their **individual websites**.
- In many cases, City agencies are required to list **procurement plans** which detail future procurement actions they plan to make.
- Vendors who are looking to partner with the City to provide Human Client Services can find out about contracting opportunities through **Health and Human Services Accelerator**.

Purchasing Services

About Purchasing

Contracts and Standards

Construction

Purchasing

Customs

Find a Vendor

Forms/Documents

Need to Know

Newsletters

Policies and Procedures

Vendors

Purchasing Services
Home

EFS - using the financial
system for Purchasing

Useful Links

Controller's Office

EFS / Finance information

Forms Library

MBid

Travel Services

U Market

University Wide Contracts

Vendor Registration

It is recommended that Construction and Design (Architect, Engineer, and Consultant) Vendors register themselves to receive invitations to respond to forthcoming Construction Purchasing Requests for Proposals or Bids.

To become a Registered Vendor, please complete and submit the Vendor Registration Application found below:

- Vendor Registration Application (155 K DOC)

Once we have received your completed Application, we will then add your vendor information to our database. Please allow up to 4 weeks to process your Application. If you would like to check on the status of your Application, please send us an e-mail requesting this update.

Once a vendor has been registered and added to our database, their vendor name will appear on the list below:

- Vendor Registration List (325 K PDF)

If your vendor is already registered with us and you would like to make changes to your database (add / remove contacts, modify area of service, etc.), simply send us an email requesting the appropriate change(s).

Viewing Documents

To view certain documents on the Construction Purchasing webpages, you must have Microsoft Word, Microsoft Excel, Acrobat Reader or WinZip programs.

Questions or Concerns?

If you are unable to open a document, have encountered a broken or incorrect link, or have any Construction Purchasing questions, please send us an email to request assistance.

Construction Purchasing Quick Links

Contractor Safety Information
Department Documents
Home Page
Project Advertisements
Project Archives
Project Results
State Designer Selection Board
Vendor Registration

All Topics and Services | **Benefits, Grants, Loans** | **Government Agencies and Elected Officials** | **Jobs and Unemployment** | **Money and Taxes** | **Travel and Immigration** | **Voting and Elections**

< **Introduction to Federal Government Contracting**

Common Federal Contracting Terms

Get Help with Government Contracting

How to Become a Federal Government Contractor

The Contract Opportunities Search Tool on beta.SAM.gov

How to Bid on a Federal Government Contract Solicitation

Once you've completed the steps to get your business ready for federal contracting, you can begin the steps for searching for and responding to contracting opportunities.

1. To find a federal contracting opportunity that's a strong match with the products and services your business is prepared to offer, search with the Contract Opportunities Search Tool on beta.SAM.gov.

2. Read all of the documentation about the contracting opportunity very carefully. Every opportunity is different and reading all of the information is extremely important so you'll understand the requirements.

3. Make sure you're responding to a solicitation rather than a presolicitation, which is often just a request for information and not actually a request for offers. If you need help understanding what certain contracting terms mean, visit the Common Federal Contracting Terms glossary.

4. Ask questions--don't guess. Before you submit your material, get your questions answered by reaching out to the agency contact person listed in the solicitation, or a Procurement Center Representative.

5. Submit the requested forms and technical, past performance, and pricing information in the appropriate format by following the instructions in the solicitation. (Only the person legally authorized to enter into contracts for your business should sign forms.)

6. Prepare to negotiate your best offer with the government. Make sure you know the pricing you included in your offer and have a strong understanding of the requirements listed in the solicitation.

A federal agency may reject or seek clarifications on your submission if it is incorrect, unclear, incomplete, or late. Many contract submissions are unsuccessful for these reasons. Give your business its best chance by responding to the solicitation on time and correctly the first time.

After You Submit an Offer

The government usually takes 30 to 120 days to review submissions. A Contracting Officer (CO) handles each review. Generally, contracts are awarded based on multiple factors, including

- How responsible and responsive a business is

Top

Typically About 4-6 Weeks

Procurement Activities

1 **Advertise / Issue the RFP**
   • **Pre-Proposal Meeting**
   • **Site Walk**
   • **Deadline to Submit Questions**

2 **Proposal Due Date**
3 **Award Date**

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Schedule – Advertisement Period

6 Weeks

Issue RFP

| 1 | 2 | 3 | 4 | 5 | 6 |

Proposals Due

Schedule – Advertisement Period

Schedule – Advertisement Period

Schedule – Advertisement Period

Issue RFP → 6 Weeks → Proposals Due

| 1 | 2 | 3 | 4 | 5 | 6 |
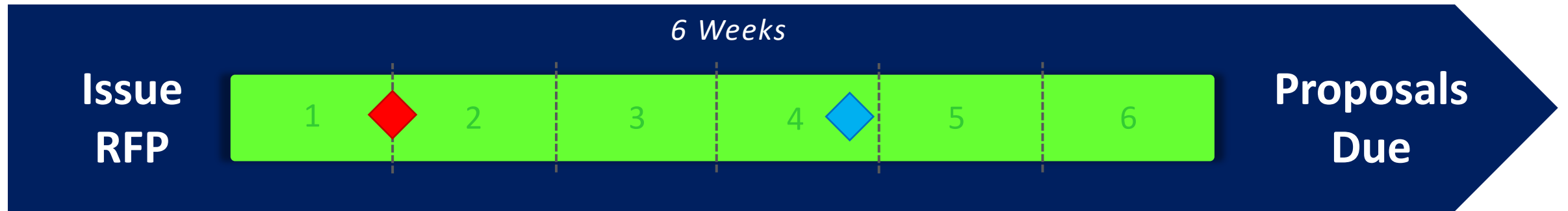
- ◆ Pre-Proposal Meeting
- ◆ Deadline For Questions
- ◆ Answers

Evaluation Period

Procurement Activities
1 **Advertise / Issue the RFP**
2 **Proposal Due Date**   • **Proposals Evaluated**   • **Shortlisting**   • **Interviews & Discussions**   • **Negotiations**
3 **Award Date**

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Evaluation Period

Procurement Activities		
1	**Advertise / Issue the RFP**	
2	**Proposal Due Date**	**6-10 Weeks**
	• Proposals Evaluated	
	• Shortlisting	
	• Interviews & Discussions	
	• Negotiations	
3	**Award Date**	

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Advertisement Period

ACTIVITY	DURATION	START	END	JAN	FEB	MAR
ADVERTISEMENT PERIOD	6 Weeks	1-Jan	12-Feb			

Advertisement Period

ACTIVITY	DURATION	START	END	JAN		FEB		MAR	
ADVERTISEMENT PERIOD	**6 Weeks**	**1-Jan**	**12-Feb**						
Pre-Proposal Meeting	**1 Day**	**10-Jan**	**10-Jan**						
Site-Walk	**1 Day**	**10-Jan**	**10-Jan**						

Advertisement Period

ACTIVITY	DURATION	START	END	JAN						FEB				MAR			
ADVERTISEMENT PERIOD	6 Weeks	1-Jan	12-Feb														
Pre-Proposal Meeting	1 Day	10-Jan	10-Jan														
Site-Walk	1 Day	10-Jan	10-Jan														
Questions Due	4 Weeks	1-Jan	29-Jan														

Advertisement Period

ACTIVITY	DURATION	START	END	JAN			FEB			MAR		
ADVERTISEMENT PERIOD	6 Weeks	1-Jan	12-Feb									
Pre-Proposal Meeting	1 Day	10-Jan	10-Jan									
Site-Walk	1 Day	10-Jan	10-Jan									
Questions Due	4 Weeks	1-Jan	29-Jan									
Answers Posted	1 Week	29-Jan	5-Feb									

Advertisement Period

ACTIVITY	DURATION	START	END	JAN		FEB		MAR	
ADVERTISEMENT PERIOD	6 Weeks	1-Jan	12-Feb						
Pre-Proposal Meeting	1 Day	10-Jan	10-Jan						
Site-Walk	1 Day	10-Jan	10-Jan						
Questions Due	4 Weeks	1-Jan	29-Jan						
Answers Posted	1 Week	29-Jan	5-Feb						
Proposal Due Date	1 Day	12-Feb	12-Feb						

Evaluation Period

ACTIVITY	DURATION	START	END	JAN		FEB		MAR	
ADVERTISEMENT PERIOD	6 Weeks	1-Jan	12-Feb						
Pre-Proposal Meeting	1 Day	10-Jan	10-Jan						
Site-Walk	1 Day	10-Jan	10-Jan						
Questions Due	4 Weeks	1-Jan	29-Jan						
Answers Posted	1 Week	29-Jan	5-Feb						
Proposal Due Date	1 Day	12-Feb	12-Feb						
EVALUATION PERIOD	6 Weeks	12-Feb	27-Mar						

Evaluation Period

ACTIVITY	DURATION	START	END	JAN	FEB	MAR
ADVERTISEMENT PERIOD	6 Weeks	1-Jan	12-Feb			
Pre-Proposal Meeting	1 Day	10-Jan	10-Jan			
Site-Walk	1 Day	10-Jan	10-Jan			
Questions Due	4 Weeks	1-Jan	29-Jan			
Answers Posted	1 Week	29-Jan	5-Feb			
Proposal Due Date	1 Day	12-Feb	12-Feb			
EVALUATION PERIOD	6 Weeks	12-Feb	27-Mar			
Proposals Evaluated	3 Weeks	13-Feb	5-Mar			

Evaluation Period

ACTIVITY	DURATION	START	END	JAN		FEB		MAR	
ADVERTISEMENT PERIOD	6 Weeks	1-Jan	12-Feb						
Pre-Proposal Meeting	1 Day	10-Jan	10-Jan						
Site-Walk	1 Day	10-Jan	10-Jan						
Questions Due	4 Weeks	1-Jan	29-Jan						
Answers Posted	1 Week	29-Jan	5-Feb						
Proposal Due Date	1 Day	12-Feb	12-Feb						
EVALUATION PERIOD	6 Weeks	12-Feb	27-Mar						
Proposals Evaluated	3 Weeks	13-Feb	5-Mar						
Identification of Best Offeror	1 Week	5-Mar	12-Mar						

Evaluation Period

ACTIVITY	DURATION	START	END	JAN			FEB			MAR		
ADVERTISEMENT PERIOD	6 Weeks	1-Jan	12-Feb									
Pre-Proposal Meeting	1 Day	10-Jan	10-Jan									
Site-Walk	1 Day	10-Jan	10-Jan									
Questions Due	4 Weeks	1-Jan	29-Jan									
Answers Posted	1 Week	29-Jan	5-Feb									
Proposal Due Date	1 Day	12-Feb	12-Feb									
EVALUATION PERIOD	6 Weeks	12-Feb	27-Mar									
Proposals Evaluated	3 Weeks	13-Feb	5-Mar									
Identification of Best Offeror	1 Week	5-Mar	12-Mar									
Contract Negotiations	2 Weeks	12-Mar	26-Mar									

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Evaluation Period

ACTIVITY	DURATION	START	END	JAN			FEB		MAR		
ADVERTISEMENT PERIOD	6 Weeks	1-Jan	12-Feb								
Pre-Proposal Meeting	1 Day	10-Jan	10-Jan								
Site-Walk	1 Day	10-Jan	10-Jan								
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Answers Posted	1 Week	29-Jan	5-Feb								
Proposal Due Date	1 Day	12-Feb	12-Feb								
EVALUATION PERIOD	6 Weeks	12-Feb	27-Mar								
Proposals Evaluated	3 Weeks	13-Feb	5-Mar								
Identification of Best Offeror	1 Week	5-Mar	12-Mar								
Contract Negotiations	2 Weeks	12-Mar	26-Mar								
AWARD DATE	1 Day	27-Mar	27-Mar								

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Evaluation Period

ACTIVITY	DURATION	START	END	JAN						FEB			MAR				APR		
ADVERTISEMENT PERIOD	6 Weeks	1-Jan	12-Feb																
Pre-Proposal Meeting	1 Day	10-Jan	10-Jan																
Site-Walk	1 Day	10-Jan	10-Jan																
Questions Due	4 Weeks	1-Jan	29-Jan																
Answers Posted	1 Week	29-Jan	5-Feb																
Proposal Due Date	1 Day	12-Feb	12-Feb																
EVALUATION PERIOD	9 Weeks	12-Feb	14-Apr																
Proposals Evaluated	3 Weeks	13-Feb	5-Mar																
Initial Shortlist	3 Days	5-Mar	10-Mar																
Notification of Shortlist	1 Week	10-Mar	17-Mar																
Interviews	1 Week	17-Mar	24-Mar																
Identification of Best Offeror	1 Week	24-Mar	31-Mar																
Contract Negotiations	2 Weeks	31-Mar	14-Apr																
AWARD DATE	1 Day	15-Apr	15-Apr																

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Include the Schedule in the RFP
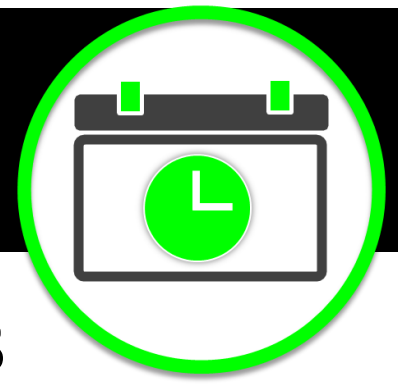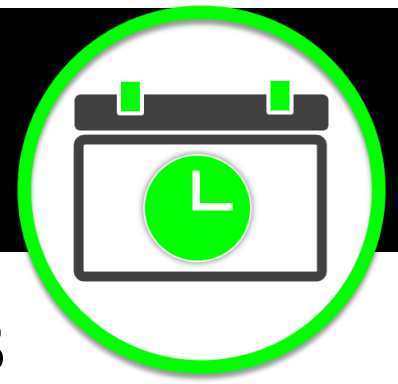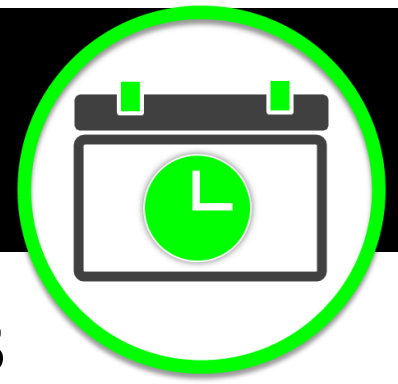
Internal Schedule

Internal Schedule

- **Account for all internal processes and procedures**
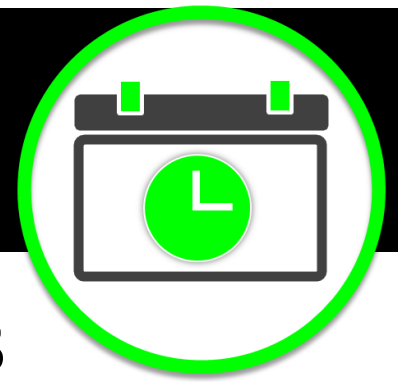
Internal Schedule

- **Account for all internal processes and procedures**

- **Gain commitment from the client and SME's.**
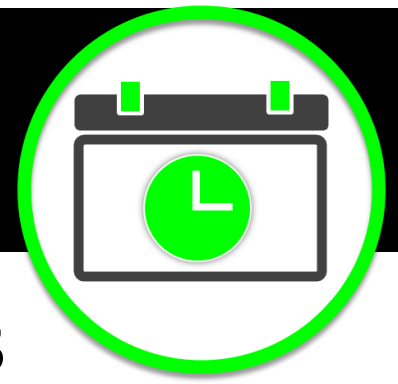
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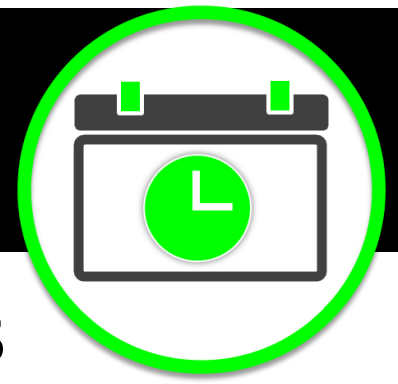- **Not shared with your suppliers**

Internal Schedule

- **Account for all internal processes and procedures**

- **Gain commitment from the client and SME's.**

- **Not shared with your suppliers**

- **Identify internal processes:**
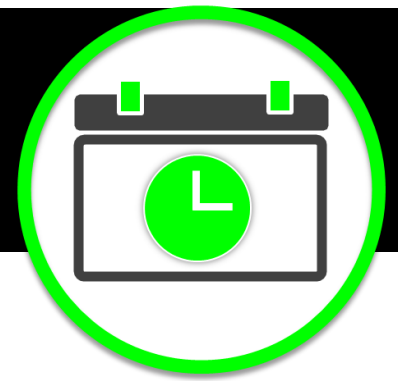
Internal Schedule

- **Account for all internal processes and procedures**

- **Gain commitment from the client and SME's.**

- **Not shared with your suppliers**

- **Identify internal processes:**
  - **Evaluation due date**

Internal Schedule

- **Account for all internal processes and procedures**

- **Gain commitment from the client and SME's.**

- **Not shared with your suppliers**

- **Identify internal processes:**
  - **Evaluation due date**
  - **Reasonable and realistic**

Internal Schedule

- **Account for all internal processes and procedures**

- **Gain commitment from the client and SME's.**

- **Not shared with your suppliers**

- **Identify internal processes:**
  - **Evaluation due date**
  - **Reasonable and realistic**
  - **Internal approvals prior to award**

Summary

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- **Procurement schedule is an important element of every RFP solicitation**

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- **General advertisement period is 4-6 weeks and 6-10 weeks for evaluation**

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Summary

- **Procurement schedule is an important element of every RFP solicitation**

- **General advertisement period is 4-6 weeks and 6-10 weeks for evaluation**

- **Provide the suppliers with as much time as possible to propose**

- **Stick to the schedule**

Scenario

Your Client/End User has contacted you about a project that they need awarded. Today's date is October 26. The User is looking to purchase a new software system to replace the Organization's current Human Resources system. This will be a complex upgrade since the current system has been in place for over 10 years and very risky since it also deals with internal payroll and finances. The anticipated size of the work is about $1-$2 Million. The User would like to have this project awarded ASAP since they are concerned that the existing system will no longer be serviceable by January 1. Therefore, this contract must be awarded by the end of the year. The User has a good idea of what they need to include in the scope of work, which should be ready to issue in about 2-weeks.

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ACTIVITY	START	END	
ADVERTISEMENT PERIOD			
EVALUATION PERIOD			
Proposals Evaluated			
Initial Shortlist			
Notification of Shortlist			
Interviews			
Identification of Best Offeror			
Contract Negotiations			
AWARD DATE			

Scenario

Your Client/End User has contacted you about a project that they need awarded. Today's date is October 26. The User is looking to purchase a new software system to replace the Organization's current Human Resources system. This will be a complex upgrade since the current system has been in place for over 10 years and very risky since it also deals with internal payroll and finances. The anticipated size of the work is about $1-$2 Million. The User would like to have this project awarded ASAP since they are concerned that the existing system will no longer be serviceable by January 1. Therefore, this contract must be awarded by the end of the year. The User has a good idea of what they need to include in the scope of work, which should be ready to issue in about 2-weeks.

ACTIVITY	START	END	
ADVERTISEMENT PERIOD			
EVALUATION PERIOD			
Proposals Evaluated			
Initial Shortlist			
Notification of Shortlist			
Interviews			
Identification of Best Offeror			
Contract Negotiations			
AWARD DATE			

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Scenario

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ACTIVITY	START	END	
ADVERTISEMENT PERIOD	11/12		
EVALUATION PERIOD			
Proposals Evaluated			
Initial Shortlist			
Notification of Shortlist			
Interviews			
Identification of Best Offeror			
Contract Negotiations			
AWARD DATE			

Scenario

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ACTIVITY	START	END	
ADVERTISEMENT PERIOD	11/12		
EVALUATION PERIOD			
Proposals Evaluated			
Initial Shortlist			
Notification of Shortlist			
Interviews			
Identification of Best Offeror			
Contract Negotiations			
AWARD DATE			

Scenario

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ACTIVITY	START	END	
ADVERTISEMENT PERIOD	11/12	12/23	6-Weeks
EVALUATION PERIOD			
Proposals Evaluated			
Initial Shortlist			
Notification of Shortlist			
Interviews			
Identification of Best Offeror			
Contract Negotiations			
AWARD DATE			

CPE
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Scenario

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ACTIVITY	START	END	
ADVERTISEMENT PERIOD	11/12	12/23	6-Weeks
EVALUATION PERIOD	1/5		
Proposals Evaluated	1/5		
Initial Shortlist			
Notification of Shortlist			
Interviews			
Identification of Best Offeror			
Contract Negotiations			
AWARD DATE			

Scenario

Your Client/End User has contacted you about a project that they need awarded. Today's date is October 26. The User is looking to purchase a new software system to replace the Organization's current Human Resources system. This will be a complex upgrade since the current system has been in place for over 10 years and very risky since it also deals with internal payroll and finances. The anticipated size of the work is about $1-$2 Million. The User would like to have this project awarded ASAP since they are concerned that the existing system will no longer be serviceable by January 1. Therefore, this contract must be awarded by the end of the year. The User has a good idea of what they need to include in the scope of work, which should be ready to issue in about 2-weeks.

ACTIVITY	START	END	
ADVERTISEMENT PERIOD	11/12	12/23	6-Weeks
EVALUATION PERIOD	1/5	4/23	15-Weeks
Proposals Evaluated	1/5	1/26	3-Weeks
Initial Shortlist	1/27	1/27	
Notification of Shortlist	1/28	1/28	
Interviews	2/1	2/5	
Identification of Best Offeror	2/8	2/8	
Contract Negotiations	2/9	4/23	6-Weeks
AWARD DATE	4/24	4/24	

Scenario

Due to holidays, this cannot be completed before end of the year

This is a Complex & Risky and must be done properly

Should have started the process months ago...

Options:

Must immediately start on this procurement (will not be awarded until end of April)

In meantime, client must find strategy to extend service of current system until April (extend contract of current system if possible, or run procurement to select a temporary consultant).

ACTIVITY	START	END	
ADVERTISEMENT PERIOD	11/12	12/23	6-Weeks
EVALUATION PERIOD	1/5	4/23	
Proposals Evaluated	1/5	1/26	3-Weeks
Initial Shortlist	1/27	1/27	
Notification of Shortlist	1/28	1/28	
Interviews	2/1	2/5	
Identification of Best Offeror	2/8	2/8	
Contract Negotiations	2/9	4/23	6-Weeks
AWARD DATE			

The "rest of the story…"

- **Scenario = Client was upset. Client wanted to sole source to a software solution. It was later determined that the system would not really 'crash' on Jan 1, so they awarded in May**

Scenario

Your Client/End User has contacted you about a project that they need awarded. Today's date is June 2. The User is looking to renew an existing contract for Janitorial Services throughout your 7 buildings. The current contract has been in place for 5-years, and is set to expire on September 15th. So a new contract must be in place before then. Although this is not a very complex service, it is very critical to get a good team/provider. Also, the anticipated size of the work is about $10 Million, over a 5-year term. The User would like to have this project awarded by the end of August. They will also be taking a 2-week vacation on Aug 3-14 (and will not be able to do any activities during this time period). The User has not drafted their scope of work, but is confident it will be done within the next 3-4 weeks.

Scenario

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ACTIVITY	START	END	
ADVERTISEMENT PERIOD			
EVALUATION PERIOD			
Proposals Evaluated			
Notification of Shortlist			
Interviews			
Identification of Best Offeror			
Contract Negotiations			
AWARD DATE			

Scenario

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ACTIVITY	START	END	
ADVERTISEMENT PERIOD			
EVALUATION PERIOD			
Proposals Evaluated			
Notification of Shortlist			
Interviews			
Identification of Best Offeror			
Contract Negotiations			
AWARD DATE			

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Scenario

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ACTIVITY	START	END	
ADVERTISEMENT PERIOD	7/1	7/30	4 weeks
EVALUATION PERIOD			
Proposals Evaluated			
Notification of Shortlist			
Interviews			
Identification of Best Offeror			
Contract Negotiations			
AWARD DATE			

Scenario

Your Client/End User has contacted you about a project that they need awarded. Today's date is June 2. The User is looking to renew an existing contract for Janitorial Services throughout your 7 buildings. The current contract has been in place for 5-years, and is set to expire on September 15th So a new contract must be in place before then. Although this is not a very complex service, it is very critical to get a good team/provider. Also, the anticipated size of the work is about $10 Million, over a 5-year term. The User would like to have this project awarded by the end of August. They will also be taking a 2-week vacation on Aug 3-14 (and will not be able to do any activities during this time period. The User has not drafted their scope of work, but is confident it will be done within the next 3-4 weeks.

ACTIVITY	START	END	
ADVERTISEMENT PERIOD	7/1	7/30	4 weeks
EVALUATION PERIOD			
Proposals Evaluated	7/31	8/14	2 weeks
Notification of Shortlist			
Interviews			
Identification of Best Offeror			
Contract Negotiations			
AWARD DATE			

Scenario

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ADVERTISEMENT PERIOD	7/1	7/30	4 weeks
EVALUATION PERIOD			
Proposals Evaluated	7/31	8/14	2 weeks
Notification of Shortlist	8/17	8/17	
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Identification of Best Offeror			
Contract Negotiations			
AWARD DATE			

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ADVERTISEMENT PERIOD	7/1	7/30	4 weeks
EVALUATION PERIOD			
Proposals Evaluated	7/31	8/14	2 weeks
Notification of Shortlist	8/17	8/17	
Interviews	8/24	8/28	
Identification of Best Offeror	8/31	9/1	
Contract Negotiations	9/1	9/15	2 weeks
AWARD DATE			

Scenario

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EVALUATION PERIOD	7/31	9/15	6.5 Weeks
Proposals Evaluated	7/31	8/14	2 weeks
Notification of Shortlist	8/17	8/17	
Interviews	8/24	8/28	
Identification of Best Offeror	8/31	9/1	
Contract Negotiations	9/1	9/15	2 weeks
AWARD DATE			

Scenario

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Proposals Evaluated	7/31	8/14	2 weeks
Notification of Shortlist	8/17	8/17	
Interviews	8/24	8/28	
Identification of Best Offeror	8/31	9/1	
Contract Negotiations	9/1	9/15	2 weeks
AWARD DATE	9/16	9/16	

Scenario

Your Client/End User has contacted you about a project that they need awarded. Today's date is June 2. The User is looking to renew an existing contract for Janitorial Services throughout your 7 buildings. The current contract has been in place for 5-years, and is set to expire on September 15th. So a new contract must be in place before then. Although this is not a very complex service, it is very critical to get a good team/provider. Also, the anticipated size of the work is about $10 Million, over a 5-year term. The User would like to have this project awarded by the end of August. They will also be taking a 2-week vacation on Aug 3-14 (and will not be able to do any activities during this time period. The User has not drafted their scope of work, but is confident it will be done within the next 3-4 weeks.

ACTIVITY	START	END	
ADVERTISEMENT PERIOD	7/1	7/30	4 weeks
EVALUATION PERIOD	7/31	9/15	6.5 Weeks
Proposals Evaluated	7/31	8/14	2 weeks
Notification of Shortlist	8/17	8/17	
Interviews	8/24	8/28	
Identification of Best Offeror	8/31	9/1	
Contract Negotiations	9/1	9/15	2 weeks
AWARD DATE	9/16	9/16	

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Scenario

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Proposals Evaluated	7/31	8/14	2 weeks
Notification of Shortlist	8/17	8/17	
Interviews	8/24	8/28	
Identification of Best Offeror	8/31	9/1	
Contract Negotiations	9/1	9/15	2 weeks
AWARD DATE	9/16	9/16	

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Scenario

Should have started the process months ago…

This is a large project and should be done properly

Options:

Best-Case scenario (everything goes right) shown, but client cannot be part of eval team since they are on vacation

Needs to assign all staff to complete scope in next 1-2 weeks (versus 4-weeks)

Extend current contract 1-2 months (due to poor planning) to allow for a more reasonable award date

ACTIVITY	START	END	
ADVERTISEMENT PERIOD	7/1	7/30	4 weeks
EVALUATION PERIOD	7/31	9/15	6.5 Weeks
Proposals Evaluated	7/31	8/14	2 weeks
Notification of Shortlist	8/17	8/17	
Interviews	8/24	8/28	
Identification of Best Offeror	8/31	9/1	
Contract Negotiations	9/1	9/15	2 weeks
AWARD DATE	9/16	9/16	

Giant Steps to Better Vendor Debriefings

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Big Picture

CPE's Foundations of Procurement Excellence

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

- **Open:** encourage and maximize competition.

- **Transparent:** provide a clear, concise & accurate process.

- **Value:** optimize the organization's return for the spend.

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

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Why are these Foundations so Important?

- **Obvious reason is to stay out of jail or the courtroom**

- **But this is what drives good vendors to your projects and gets them to invest their time and effort.**

Putting RFP Excellence Into Practice

- Fair
- Open
- Transparent
- Value
- Integrity
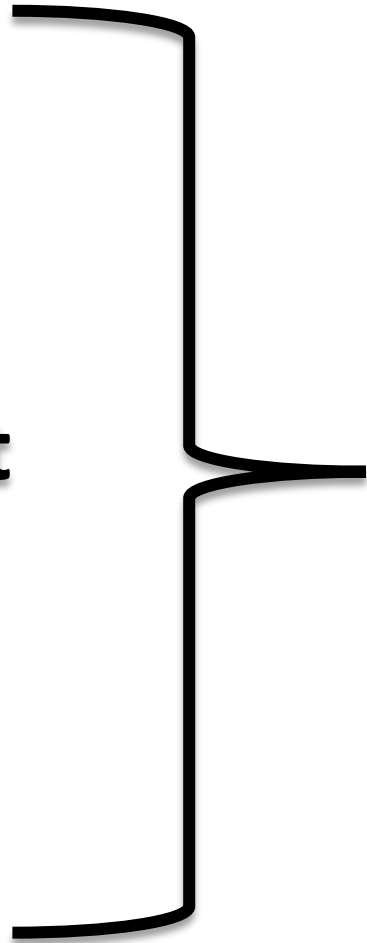
Strategic Objective:

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

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AWARD

Pre-Award

AWARD

Pre-Award

Post-Award

Debriefing

- **Formal procurement process where vendors or suppliers that were unsuccessful, are informed about the reasons why they were not selected for award.**

Debriefing

- **Formal procurement process where vendors or suppliers that were unsuccessful, are informed about the reasons why they were not selected for award.**

- **This can include reasons for low scores or ratings, and areas of weaknesses or opportunities of improvement**

Debriefing

- **Formal procurement process where vendors or suppliers that were unsuccessful, are informed about the reasons why they were not selected for award.**

- **This can include reasons for low scores or ratings, and areas of weaknesses or opportunities of improvement**

- **Debriefings can be done in person or in writing (via email).**
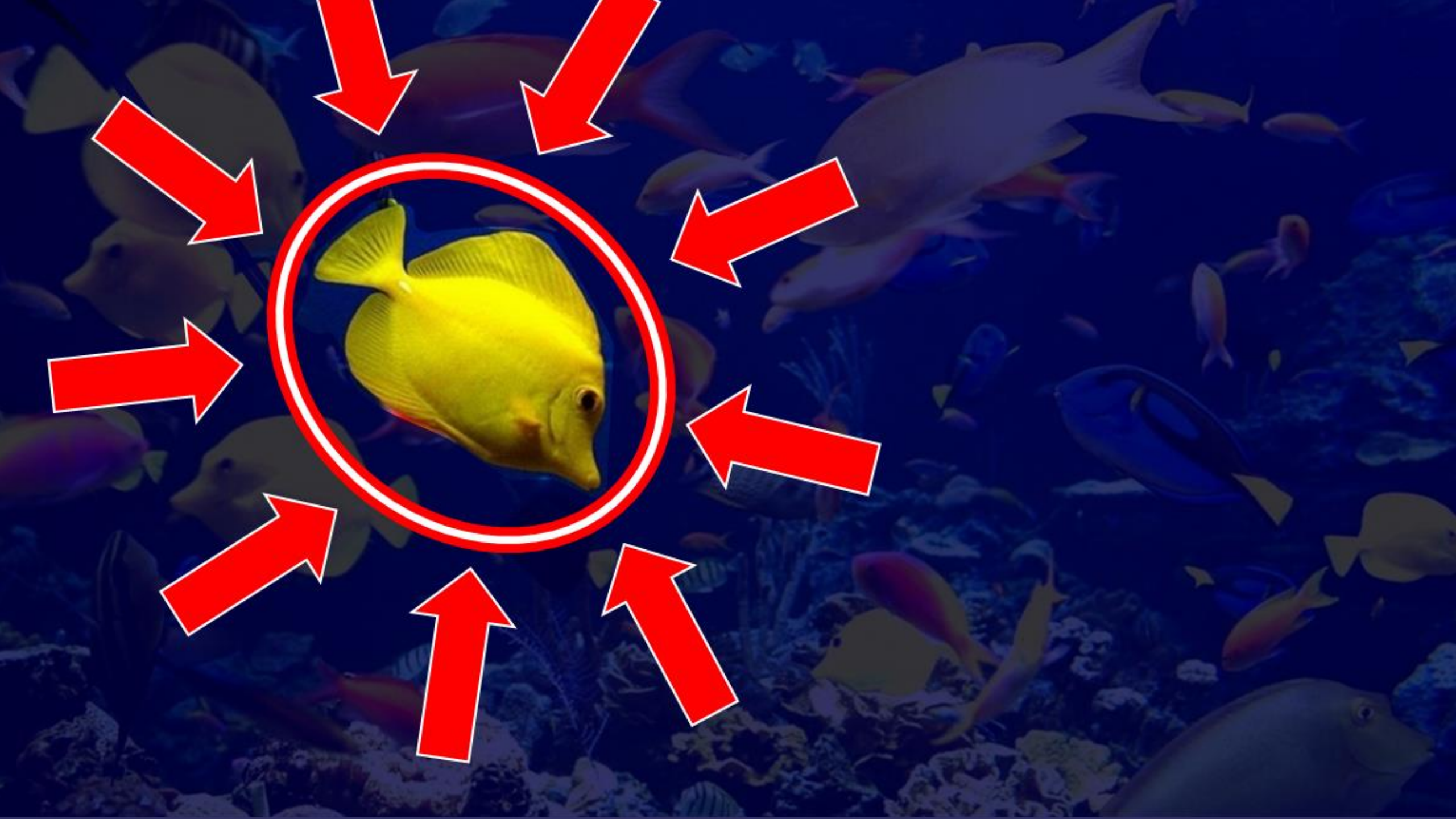
Poor Quality Debriefing

- **Assumptions about you as a client**

- **Poor reputation, less quality proposals, and lower future response rates**

- **Protest – vendor assumption that you did not follow your process**

- **Vendor will imagine the worst and assume you selected a favorite/preferred vendor**

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!"

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Consider The Following:

Thank you for your proposal submission. We appreciate the time and effort that you put into the response. Your proposal was very comprehensive, but we selected another proposal that was a better fit for our needs. We really appreciate your submission and would encourage you to participate on our future efforts.

Consider The Following:

Thank you for your proposal submission. *We appreciate the time and effort that you put into the response. Your proposal was very comprehensive, but we selected another proposal that was a better fit for our needs. We really appreciate your submission and would encourage you to participate on our future efforts.*

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Consider The Following:

Thank you for your proposal submission. We appreciate the time and effort that you put into the response. Your proposal was very impressive, but we selected another proposal that was better for our needs. We really appreciate your submission and would encourage you to participate on our future efforts.
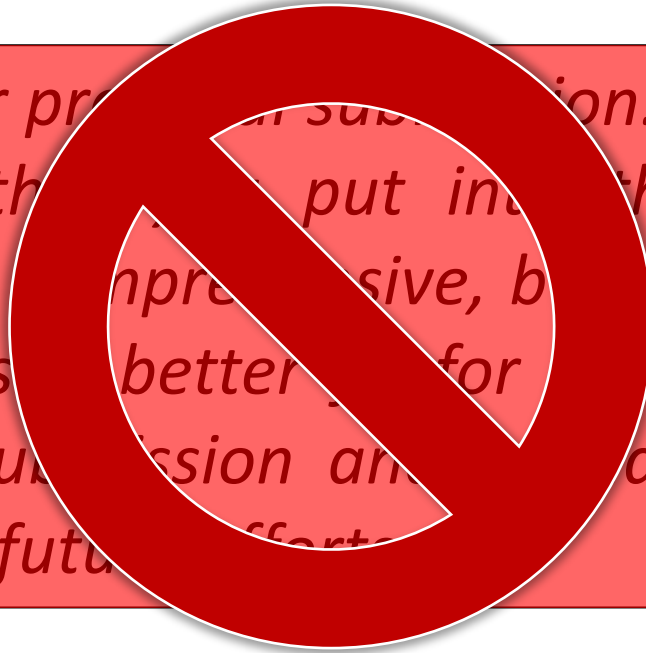
2. ██████████████████████████████: The committee was impressed with the proposed team and their seamless ability to move from a similar project. However, the recently completed project was a different delivery method than the one proposed for this project. The ██████ ████████████ technology showed efficiency and organization in a project. Overall, the committee was concerned with the level of experience at ████████ University and projects specific to ██ ██████████████████████ Technology Building.

3. ████████████████████: The committee was impressed with the level of experience of many of the team members but was not convinced that the team would remain with the project to completion. The target value budget management model, site modeling, and energy analysis was creative but the overall presentation showed weaknesses in delivering this project.

4. ██████████████████████████████: The committee determined that the proposed team lacked enthusiasm for this project. The team showed recent experience in this type of building, however failed to display experience with ██████████ University projects. In addition, the

Recommendation

Provide the vendors with as much information as possible to help them understand why they lost

TURBO

PRESS

SHOT
02

51:4

Would A Vendor Be…

- **More/less likely to propose on the next project we have?**

- **More/less likely to invest greater time and resources writing a proposal response?**

- **More/less likely to assign their best people to your project?**

The purpose is not to just explain why they lost!

Provide them with enough comfort that they were treated fairly, so that they will want to propose on our next project

Debriefing Scenario 2

- **Factor 1 (Cost): 2nd best**
- **Factor 2 (Approach): 1st best**
- **Factor 3 (Experience): 4th best**
- **Factor 4 (References): 2nd best**
- **Factor 5 (Qualifications): 4th best**
- **Factor 6 (Interview): 4th best**

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Debriefing Scenario 2

Thank you for your proposal submission. We appreciate the time and effort that you put into the response. Your proposal was very comprehensive, but we selected another proposal that was a better fit for our needs. We really appreciate your submission and would encourage you to participate on our future efforts.

- **Factor 1 (Cost): 2nd best**
- **Factor 2 (Approach): 1st best**
- **Factor 3 (Experience): 4th best**
- **Factor 4 (References): 2nd best**
- **Factor 5 (Qualifications): 4th best**
- **Factor 6 (Interview): 4th best**

Debriefing Scenario 2

- Factor 1 (Cost): **2nd best**
- Factor 2 (Approach): **1st best**
- Factor 3 (Experience): **4th best**
- Factor 4 (References): **2nd best**
- Factor 5 (Qualifications): **4th best**
- Factor 6 (Interview): **4th best**

Debriefing Scenario 3

- **Factor 1 (Cost): 2nd best – ($55,000)**
- **Factor 2 (Approach): 1st best (8.4)**
- **Factor 3 (Experience): 4th best (6.1)**
- **Factor 4 (References): 2nd best (5.9)**
- **Factor 5 (Qualifications): 4th best (5.4)**
- **Factor 6 (Interview): 4th best (5.4)**

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Debriefing Scenario 4

- **Vendor 1: xxx Points**
- **Vendor 2: 780 Points**
- **Vendor 3: xxx Points**
- **Vendor 4: xxx Points**
- **Vendor 5: xxx Points**

Debriefing Scenario 5

- **Vendor 1: 845 Points**
- **Vendor 2: 780 Points**
- **Vendor 3: xxx Points**
- **Vendor 4: xxx Points**
- **Vendor 5: xxx Points**

Public Disclosure & Public Information

Freedom of Information Act (FOIA)

Federal law that allows the public the right to request access to records from any federal agency. Federal agencies are required to disclose any information requested under the FOIA (unless it specifically protected as confidential – such as personal privacy, national security, or law enforcement.)

Public Records Act (States)

Access to Information Act (Canada)

Recommendation

Provide the vendors with as much information as possible to help them understand why they lost

Guide to Effective Vendor Debriefings

Page <u>200</u> of the PDF file

CPE's "Three S's" to a Great Debriefing

1. **Summarize** the evaluation process

2. **Synthesize** evaluator comments

3. **State** the vendor's relative evaluation scores

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Step 1: Summarize the evaluation process

SELECTION PROCESS REVIEW

As outlined in the RFP, the purpose of the debriefing is to provide general feedback on the proposal, discussing strengths and weaknesses with the objective being to assist the firm in preparation of future proposals.

Selection & Evaluation Process:

1. The City received a total of **six (6)** compliant submissions for this RFP
   - The following proposal forms were reviewed by The City's Procurement Agent to ensure all formatting requirements were met and that no identifying information was present.
     o Project Methodology (Proposal Form 4)
     o Technical Approach (Proposal Forms 5)
     o Public Engagement Strategy (Proposal Form 6)

2. Proposal Evaluations
   - From each consultant, sections above were sent to the Evaluation Committee to be reviewed individually.
   - The Evaluation Committee members then submitted their evaluations back to The City's Procurement Agent. The compiled scores for each Proposal Form used to calculate evaluation points.
   - Each consultant's past performance information and narratives of related experience submissions were scored directly by The City's Procurement Agent based upon the number of surveys and the numerical values submitted within each survey.
   - Cost Proposals were entered into the Evaluation Matrix numerically by The City's Procurement Agent.
   - After reviewing the proposals, the Evaluation Committee was provided with the Past Performance Surveys and Narratives of Related Experience.

3. Short List Determination
   - After completing the above evaluations, the top **three (3)** ranked proposals were short listed and

Step 2: Synthesize evaluator comments

Feedback for Future RFP Submissions

FEEDBACK FOR FUTURE RFP SUBMISSIONS

1. **Execution Methodology**
   - Strengths:
     - Detailed schedule and tasks provided.
     - Timeline diagram was well-presented.
     - Graphic was helpful in understanding the text portion.
     - Specifically addressed items requested in our scope and provided specific deliverables and project schedule
     - Consultant provided how's on all 8 items listed in our scope of work. Defined deliverables of their scope too.
   - Areas for improvement:
     - Order of tasks based on scope instead of logical order – made it slightly more difficult to follow the flow and envision the sequencing.
     - The formatting made it hard to read.
     - Public mtg and CC not specifically mentioned
     - Detailed text was generalized and seemed generic in regards to this project.

2. **Technical Approach**
   - Strengths:
     - Survey/questions staff
     - Sustainable design option note –change in growth could impact
     - Solutions in many items were vague and more related to marketing than addressing the issues of the site and overall project.

...Detailed plan w/ durations

Wall o' text...

Modern law enforcement continually places new demands on police departments to train their officers to meet today's growing needs and demands. The citizens of Lawrence expectations for police officers result in ever higher standards for recruiting, training, accreditation, and certification standards. Architecture for law enforcement, when approached properly, is a powerful tool for police agencies to use to reduce crime, enhance the overall quality of life for their communities, and recruit/retain the very best staff.

This project will begin with a goal-setting exercise and a review of the documents. Much has changed with the city and department since the progra 2012—a new chief of police, senior leadership changes, and departmental gro conduct a detailed review with each division to confirm and or modify the document. We will also review the staffing projections and confirm the grow department. A police department does not grow by adding new divisions; it ad in each division—an additional records clerk, a new detective, more patrol office must be programmed from the beginning to provide the department with the a future. Infrastructure and systems are also important to consider when plann undersized water line or electrical service can limit expansion opportunities or i future. Using the information gathered, we will update the program. We will als one priorities provided in your outline and cross-reference them with the progr square footage of this and subsequent phases.

We will use the updated program and phase priorities to develop a master p building. The master planning process is critical to the ultimate success of facilities are function-driven buildings. A significant amount of time will stakeholders to review "how" they do their jobs to develop the best building la The design team will meet with the different divisions in multi-day worksh program and phases and 'test fit' plans.

Understanding the workflow and relationship of the divisions is critical. workflow of a patrol officer at the beginning and end of their shift will influen officers share patrol vehicles and typically carry large patrol duty bags to and the building and their personal car. Placing a duty bag locker near the patrol ar staff entrance can assist in this workflow. We have provided this feature in positive impact on officer efficiency. Additionally, the location of the locker ro report-writing stations, patrol equipment area, and shift sergeant offices in the enhance or detract from the efficiency and operations of the staff. During th process, we will discuss each division in this level of detail.
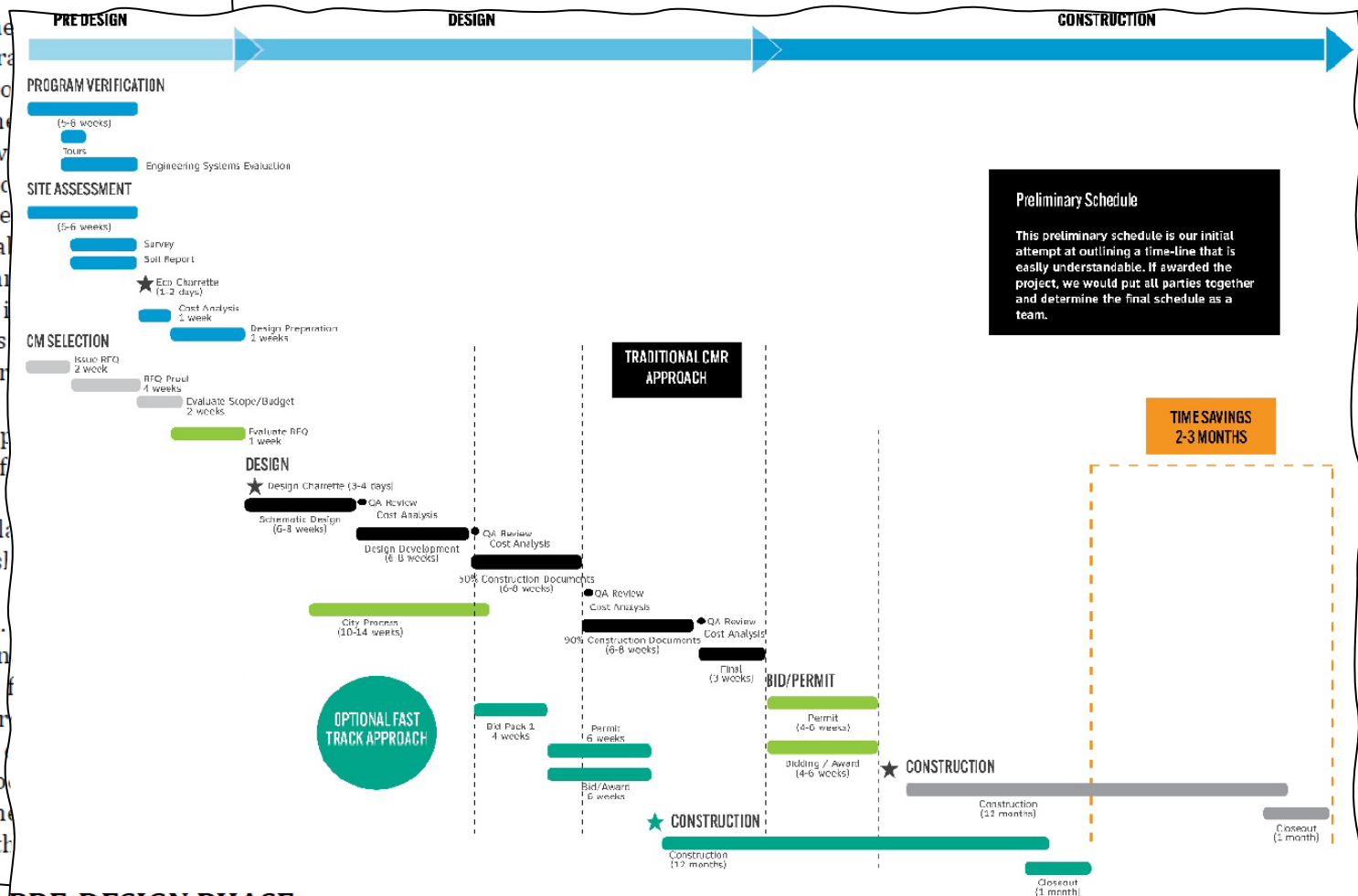
PRE-DESIGN PHASE
During the pre-design phase the design team will complete four primary, but very important tasks: 1) assist in Construction Manager Selection, 2) verification of Space Needs, 3) assessment of the Project Site and 4) analyze the Project Budget.

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Execution Methodology
- Strengths:
    - Provided a great deal of detail in certain areas; however, the format was somewhat difficult to review.
    - Appeared to have experience with facilities.
    - Mentioned public engagement and concerns.
- Areas for improvement:
    - Did not provide a timeline for an approximate schedule and duration.
    - Proposal felt more like sales language of a general delivery instead of speaking to this particular project.
    - Execution methodology read more like a term paper than a proposal.
    - Lacked details on schedule.
    - Format was terrible, should have subsections or bulleted list.
    - Formatting was not ideal. Presentation is important.

Step 3: State the vendor's relative evaluation scores

NO	CRITERIA	FIRM A	FIRM B	FIRM C	FIRM D	FIRM E
1	Cost/Fee	$ 248,000	$ 249,250	$ 252,575	$ 257,000	$ 263,000
2	Approach & Execution	7.6	8.0	7.0	6.0	6.2
3	Qualifications	7.6	7.1	7.9	7.9	6.4
4	Innovation	7.5	6.1	6.0	5.8	5.1
5	References	9.5	10.0	9.2	9.9	9.3
6	Interviews	8.6	5.9	5.1	5.1	4.8
	OVERALL SCORE:	**97**	**94**	**91**	**87**	**84**

NO	CRITERIA	FIRM A	FIRM B	FIRM C	FIRM D	FIRM E
1	Cost/Fee	$ 248,000	$ 249,250	$ 252,575	$ 257,000	$ 263,000
2	Approach & Execution	7.6	8.0	7.0	6.0	6.2
3	Qualifications	7.6	7.1	7.9	7.9	6.4
4	Innovation	7.5	6.1	6.0	5.8	5.1
5	References	9.5	10.0	9.2	9.9	9.3
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5	References	9.5	10.0	9.2 ✓	9.9	9.3
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	OVERALL SCORE:	**97**	**94**	**91**	**87**	**84**

NO	CRITERIA	FIRM A	FIRM B	FIRM C	FIRM D	FIRM E
1	Cost/Fee	$ 248,000	$ 249,250	$ 2__,575 **+2%**		
2	Approach & Execution	7.6	8.0	7.0	6.0	6.2
3	Qualifications	7.6	7.1	7.9	7.9	6.4
4	Innovation	7.5	6.1	6.0	5.8	5.1
5	References	9.5	10.0	9.2	9.9	9.3
6	Interviews	8.6	5.9	5.1	5.1	4.8
	OVERALL SCORE:	**97**	**94**	**91**	**87**	**84**

NO	CRITERIA	FIRM A	FIRM B	FIRM C	FIRM D	FIRM E
1	Cost/Fee	$ 248,000	$ 249,250	$ 2__,575		+2%
2	Approach & Execution	7.6	8.0	7.0	6.0	6.2
3	Qualifications	7.6	7.1	✓		0%
4	Innovation	7.5	6.1	6.0	5.8	5.1
5	References	9.5	10.0	✓		-8%
6	Interviews	8.6	5.9	5.1	5.1	4.8
	OVERALL SCORE:	**97**	**94**	**91**	**87**	**84**

NO	CRITERIA	FIRM A	FIRM B	FIRM C	FIRM D	FIRM E
1	Cost/Fee	$ 248,000	$ 249,250	$ 2□□,575 ✔		
2	Approach & Execution	7.6	8.0	✖		
3	Qualifications	7.6	7.1	✔		
4	Innovation	7.5	6.1	✖		
5	References	9.5	10.0	✔		
6	Interviews	8.6	5.9	✖		
	OVERALL SCORE:	**97**	**94**	**91**	**87**	**84**

+2%
-13%
0%
-20%
-8%
-41%

Should Not Be Fearful If Procurement Was Performed Fairly

NO	CRITERIA	FIRM A	FIRM B	FIRM C	FIRM D	FIRM E
1	Cost/Fee	$ 248,000	$ 249,250	$ 2⎯⎯,575		
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6	Interviews	8.6	5.9			
	OVERALL SCORE:	**97**	**94**	**91**	87	84

+2%
-13%
0%
-20%
-8%
-41%

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Example

Detailed Review of the Consultant's Proposal:

A detailed view of Raw Evaluation scores is shown below.

NO	CRITERIA	Evaluation Scale	Consultant XYZ	Average Score of all Proposals	XYZ's Percentage from Average Score	Average Score of Short List	XYZ's Percentage from Average Score
1	Project Methodology	1 - 10	5.6	5.2	8%	6.7	-16%
2	Technical Approach	1 - 10	3.0	5.0	-40%	6.7	-55%
3	Public Engagement Strategy	1 - 10	1.8	4.2	-57%	5.5	-67%
4	Interviews (for short-listed)	1 - 10	NA	NA	NA	5.4	NA
5	Past Performance Surveys (Project Team)	1 - 10	9.6	9.7	-1%	9.7	-1%
6	Past Performance Surveys (Project Team)	Count	12	11	9%	11	9%
7	Narratives of Related Experience	1 - 10	6.4	4.9	31%	5.4	19%

Detailed Review of the Consultant's Proposal:

A detailed view of Evaluation Points received in each weighted category is shown below.

NO	CRITERIA	Points Possible	XYZ's Points	XYZ's Overall Rank	Average Points of all Proposals	XYZ's Distance from Average	Average Points for Short List	XYZ's Distance from Average
1	Execution Methodology	15	11.0	4th	10.3	-7%	13.2	-17%
2	Risk Assessment - Controllable + Non-Controllable	20	7.6	4th	12.6	-40%	17	-55%
3	Value Assessment	15	4.2	6th	9.8	--57%	12.8	-67%
4	Interviews (for short-listed)	35	0	NA	NA	NA	28.3	NA
5	Past Performance Surveys (Project Team)	5	4.9	3rd	4.7	4%	4.7	-4%
7	Narratives of Related Experience	10	8.7	1st	6.6	32%	7.2	9%
	Total Score	100	36.4	4th	44	-17%	83.2	--56%

BONUS: Ask the vendors for their feedback!

- **At the conclusion of the meeting, ask if the Vendor has any feedback about the evaluation process.**

Feedback from Consultant Team:
- We would recommend establishing opportunities for consultants to learn more about the project up front before responding. It is difficult to respond when the scope is open-ended. The city may consider proprietary interviews (i.e. 1 hour per consultant or whatever amount is reasonable)

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Other Keys

Keys to Providing Actionable Feedback

1) "Translate" the vendor proposals back them

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What did their words mean to <u>you</u> as a client?

Keys to Providing Actionable Feedback

1) "Translate" the vendor proposals back them

2) Remind them about differentiation

2) Remind them about differentiation

- Can their competitors say the same thing?

- Does their proposal make them stand out?

- Is it boilerplate? Standard? Copy/Paste?

Keys to Providing Actionable Feedback

1) "Translate" the vendor proposals back them

2) Remind them about differentiation

3) Know thy audience: What are the benefits to the client?

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3) What are the benefits to the client?

- **They should be adding value to the client!**

- **What are the outcomes? The results?**

- **Where is the proof? How can we believe it?**

Hesitancy with Offering Debriefings

Protests

GAO — U.S. Government Accountability Office

Congressional Research Service
Informing the legislative debate since 1914

GAO Bid Protests: Trends and Analysis

Moshe Schwartz
Specialist in Defense Acquisition

Kate M. Manuel
Legislative Attorney

July 21, 2015

Congressional Research Service
7-5700
www.crs.gov
R40227

CRS REPORT
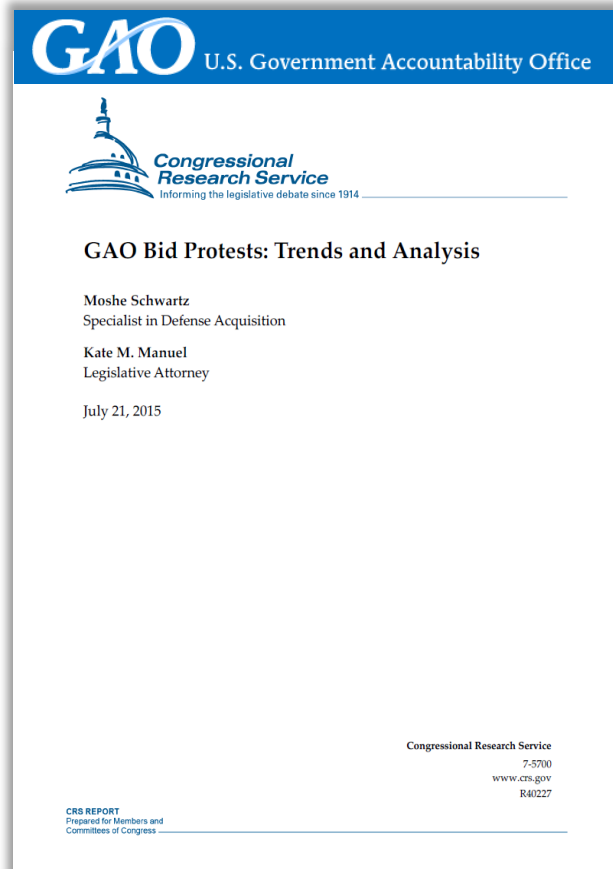Prepared for Members and
Committees of Congress

Figure 8. Number of Bid Protest Cases Filed with GAO
FY1986-FY2014
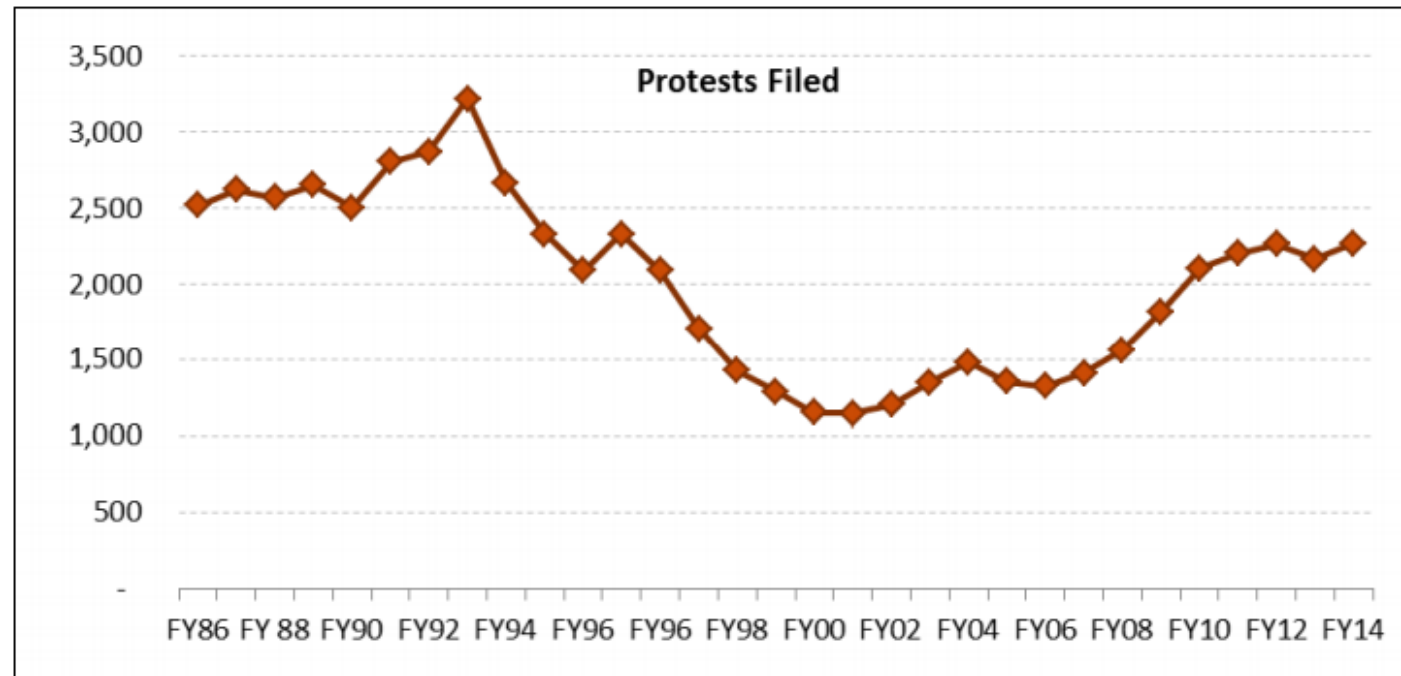
Protests Filed

Source: CRS analysis of Comptroller General annual reports to Congress for FY1986-FY2014. Data excludes protests from expanded jurisdiction.

The Golden Rule

Clearly state *exactly how you are going to evaluate & score*

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Clearly state *exactly how you are going to evaluate & score*
*...And make sure you **follow** what you said you would do*

20-40% Of Protests Are Sustained

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1. **Unequal treatment of proposers**

2. **Failure to follow evaluation criteria**

3. **Unreasonable technical evaluations**

4. **Unreasonable past performance evaluations**

5. **Unreasonable cost/price evaluations**

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20-40% Of Protests Are Sustained

1. Unequal treatment of proposers

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3. Unreasonable technical evaluations

4. Unreasonable past performance evaluations

5. Unreasonable cost/price evaluations

The Golden Rule

Clearly state *exactly how you are going to evaluate in the solicitation....*

*...And make sure you **follow** what you said you would do*

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20-40% Of Protests Are Sustained

1. **Unequal treatment of proposers**

2. **Failure to follow evaluation criteria**

3. **Unreasonable technical evaluations**

4. **Unreasonable past performance evaluations**

5. **Unreasonable cost/price evaluations**

Unreasonable:
flawed approach to the evaluation

the scoring process was **flawed**

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Summary

Key Points

- **RFP Scheduling is really important – this is a "value add" to the organization**

- **Vendor debriefings is an active process; try to convince your industry partners that you want to do it (and then do a good job!)**
  - **It will make a positive impact in how you are see to the industry**

Research Study: IT Procurement Best Practices

How to get involved:

- **Are you involved in IT procurements related to transportation?**

- **Or know anyone else who is?**

- **The Research Team is looking for…**
  - **Examples of IT RFPs in transportation**
  - **IT RFP best practices**
  - **Case studies & stories**
  - **Current or upcoming IT procurement in transportation?**
    - **Add the RFP Doctors to your team to assist & capture Lessons Learned!!**

Just Email the Research Team!

Brian.Lines@simplar.com
Subject: CPE's IT Procurement Study

We will reach out from there!

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**

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17
November

← **Next Month!**

Announcing CPE's New RFP Library

Our RFP Library contains more than 3,000 RFPs & SOWs issued in the last 15 years. We'll showcase how to navigate the RFP Library, which is organized into 4 collections of IT, AEC, FM, and Business Services.

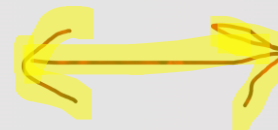**☑ Add to Calendar**

---

20 October ⟷ 17 November

Announcing CPE's New RFP Library

Our RFP Library contains more than 3,000 RFPs & SOWs issued in the last 15 years. We'll showcase how to navigate the RFP Library, which is organized into 4 collections of IT, AEC, FM, and Business Services.

☑ Add to Calendar

The Administrative Burdens of Reference Checks

There are many ways to perform reference checks on proposing firms… so how can we do this as efficiently as possible? We'll recommend ways to streamline your procedures.

☑ Add to Calendar

15 December

Document Deficiencies During the RFP Process

Research shows that contractors discover nearly two-thirds of document deficiencies during the proposal phase. Yet owners usually don't learn of these until after the contract is signed. So what can we do in the RFP phase to encourage earlier–and more transparent–feedback from our contractors?

☑ Add to Calendar

19 January

Can you evaluate Fee in A/E Procurements?

Architecture & engineering (A/E) professionals have traditionally been procured by QBS, yet clients are increasingly seeking to evaluate fees. Is this OK? Let's scratch the surface of this hot-button topic!

☑ Add to Calendar

16 February

What is Cost Worth?

Remember the joys of mathematical proofs from grade school? The RFP Doctors are whipping out their calculators to PROVE the fundamental equation of cost evaluations (Cost > 35% = LOW BID)

☑ Add to Calendar

16 March

What are the "Best" Evaluation Criteria?

The fundamental purpose of evaluation criteria is to differentiate between competing proposals. But which criteria do this the best? We'll breakdown a study that investigated this question across 1,850 proposals.

☑ Add to Calendar

ASK the RFP Doctor

Upcoming Topics!

Register at: center4procurement.org/rfp-doctor

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Previous Recordings Available Online!

Handling Large IT Hardware Buys With Different Scope Packages — October 21, 2021 — CPE — ASK the RFP Doctor	**Vendor of Record Programs** — November 18, 2021 — CPE — ASK the RFP Doctor	**7 Most Deadly Marketing Phrases** — December 16, 2021 — CPE — ASK the RFP Doctor	**It's a New Year - Ready for the Next Level?** — January 20, 2022 — CPE — ASK the RFP Doctor
Best Practices for Evaluator Training — February 17, 2022 — CPE — ASK the RFP Doctor	**Got RFP Soft Skills?** — March 17, 2022 — CPE — ASK the RFP Doctor	**Best Practices for Evaluator Training** — February 17, 2022 — CPE — ASK the RFP Doctor	**Got RFP Soft Skills?** — March 17, 2022 — CPE — ASK the RFP Doctor
IT Software Demonstrations — June 16, 2022 — CPE — ASK the RFP Doctor	**Amazing Pre-Proposal Meetings** — July 21, 2022 — CPE — ASK the RFP Doctor	**Responding to Vendor RFIs** — August 18, 2022 — CPE — ASK the RFP Doctor	**Human Dimensions of Procurement Professionals** — September, 15 2022 — CPE — ASK the RFP Doctor

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CPE's Speakers Bureau

CPE can teach at your events!

Topics:

- **Practical Leadership Skills for Procurement Professionals**
- **The Practical Guide to Effective Supplier Evaluations**
- **RFPs as Part of Procurement Excellence**
- **Sharing your Project Budget**
- **...and many more!**

CPE Center for Procurement Excellence

center4procurement.org/speakers-bureau/

CPE Speaker's Bureau

Presentations in 2022

- Maryland Public Procurement Association MPPA (DC area)
- NIGP Copper Chapter, Tucson, AZ (Virtual)
- Richland Hills, Texas (Dallas-Forth Worth Area)
- Oklahoma (OMES) Procurement Training (Virtual)
- Rocky Mountain NIGP (Denver)
- Maryland ASBO (Ocean City, MD)
- Ontario University Professional Procurement Management Association, OUPPMA (virtual)
- Texas Public Purchasing Association (TxPPA) (Galveston, TX)
- NASPO REACH (Kansas City, MO)
- East Tennessee Purchasing Association (Johnson City, TN)
- Washington Finance Officers Association (Virtual)
- Central Ohio IFMA (Virtual)
- Iowa Public Procurement Association (Virtual)
- Washington NIGP (Virtual)
- Emerging Leaders / TX Council of Government (Dallas-Fort Worth)

center4procurement.org/speakers-bureau/

Attend our other presentations!

Tuesday @ 2:30pm

➤ **Capital Projects & Alternative Delivery**

Marriott – San Carlos II

➤ **Best Practices in Procuring Enterprise-Level Software Solutions**

Marriott – San Carlos I

Tuesday @ 4:00pm

➤ **How to Do Market Research More Effectively**

Marriott – San Carlos IV

Wednesday @ 8:30am

➤ **Stuck in a Low Bid World? Recommendations for Procurement Excellence**

Marriott – San Carlos III

Wednesday @ 10:00am

➤ **Navigating the Perilous Water of RFP Administration and Procurement**

Marriott – San Carlos III

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Want today's Presentation? Free white paper?