

Free Webinar Series

3rd Thursdays every month

@ 12pm Central

15-min Teaching Moment

(learn a new tip, trick, or tool)

30-min Virtual Peer Group

(network with professionals)

Office Hours

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



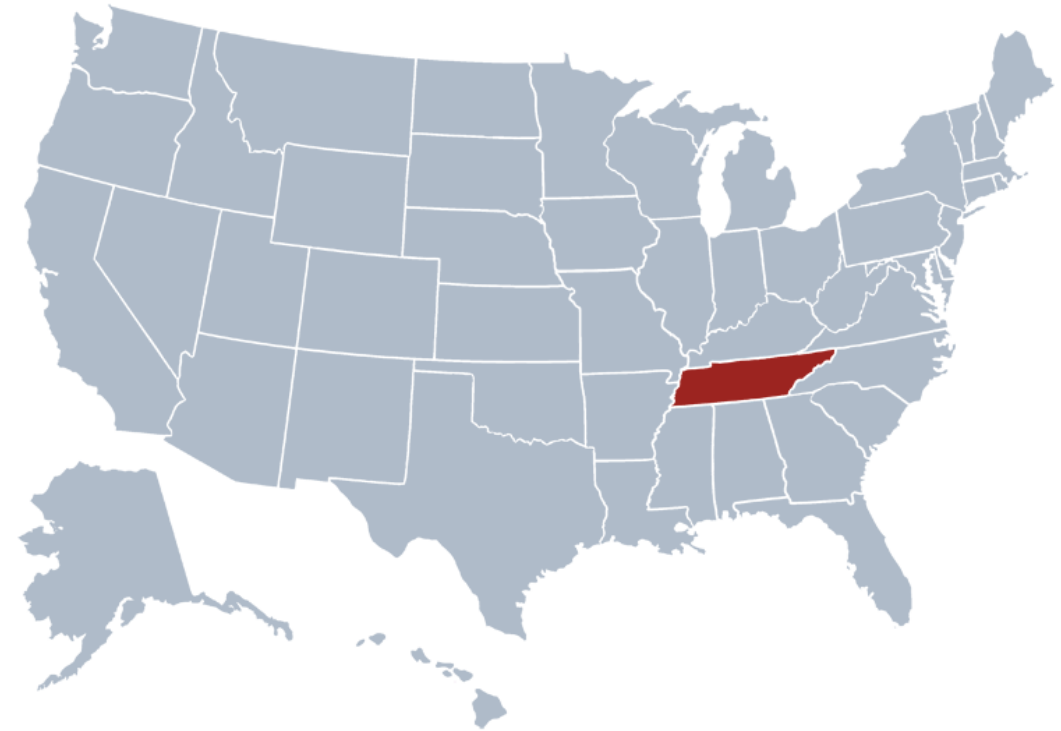
Organizing a High-Performing RFP



**Are You Writing RFP's And
Not Getting Any
Responses???**

Case Study

- Challenges with performance of procured services (construction services)



Survey Contractors

- How fair is the procurement process
- How transparent is the procurement process
- What is most important to TN
- What is their overall satisfaction with TN

Vendor Perceptions

56 Contractors

CONTRACTOR ASSESSMENT

Regarding Experiences With The State of Tennessee

OVERVIEW

Researchers from Arizona State University conducted two separate surveys on contractors that perform work with the State of Tennessee. The first survey was performed in person (Nashville) at a general educational presentation (on August 15, 2016). During the presentation, contractors were asked to provide feedback regarding their experiences working with the State of Tennessee. The second survey was performed online (September 30, 2016), by sharing the survey link with the Associated General Contractors (AGC) of TN. The contractor responses were collected anonymously. The results of the survey are shown below.

SURVEY RESULTS

56 Contractors responded to the anonymous survey

31% believe that the procurement process is fair, and all vendors have an equal opportunity to win the contract

21% believe that the procurement process is clear and transparent (they understand the criteria that they will be evaluated on, and how the scoring will be performed)

75% believe that the State is more concerned about lowest cost rather than highest value

89% believe that Contractors should be awarded projects based on their overall value

31% believe that the Scope of Work contained in each solicitation is complete & accurate

42% Satisfaction with the Designers that are selected by the State of TN

Overall Satisfaction with State of TN = 31%

Overall Satisfaction with other Owners they work for = 80%

COMPARISON

The following table provides a comparison to 3 other Public Agencies that have performed similar vendor benchmarking and analytics.

CRITERIA	STATE OF TN	3 PUBLIC AGENCIES
1. The procurement process is clear and transparent	21%	85%
2. The procurement process is fair	31%	68%
3. The Organization is more concerned about lowest cost rather than value	75%	66%
4. Overall satisfaction with the Organization	31%	77%
5. Overall satisfaction with other Organizations	80%	79%
6. Total number of vendor responses	56	147

Vendor Perceptions

56 Contractors

31% believe the process is fair

69% believe that vendors do not have an equal opportunity to win the contract

75% believe that the State only cares about lowest price versus getting overall value

31% overall satisfaction rate with the State (compared to 80% with other owners)

CONTRACTOR ASSESSMENT

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CONTRACTOR ASSESSMENT

What impacts would this have if you were a vendor?

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SURVEY RESULTS

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- 21% believe that the procurement process is clear and transparent
- 75% believe that the State is more concerned about lowest cost rather than highest value
- 89% believe that Contractors should be awarded projects based on their overall value
- 31% believe that the Scope of Work is complete & accurate
- 42% Satisfaction with the way the State treats its contractors

Overall Satisfaction with State of TN = 31%
Overall Satisfaction with other Owners they work for = 80%

COMPARISON
The following table provides a comparison of the 3 major Public Agencies that were surveyed and analyzed for this report.

CRITERIA	STATE OF TN	3 PUBLIC AGENCIES
1. The procurement process is clear and transparent	21%	85%
2. The procurement process is fair	31%	69%
3. The Organization is more concerned about lowest cost rather than overall value	75%	77%
4. Overall satisfaction with the State of Tennessee	31%	77%
5. Overall satisfaction with other Owners they work for	31%	80%
6. The amount of vendors	31%	80%



If Vendor Perceive That Process Is Not Fair

Who bids

Quality of the bid

Quality of the team assigned

Quality and Performance of the services

...But Their
Opinions &
Perceptions
Are Not
Accurate!



...Supplier
Perceptions
Matter!



Your Perception About Yourself Doesn't Matter!



**RFP
Solicitation**



The RFP Solicitation

What Is The Primary Goal Of The RFP?

What Is The 'Primary' Objective

- Follow procurement policies and regulations?
- Minimize the risk of protest?
- Create a document that transfers risk to the supplier?
- Create a document that protects the owner/organization?

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**These should not be
your primary objectives!**

What Is The Primary Goal Of The RFP?

Help us award to a high-performing supplier



Important

We must first *attract the best* suppliers/solutions to your RFP

What Type Of Suppliers Do You Want To Attract?

Supplier A



Supplier B



Wisdoms

From A Former Supplier



Suppliers Have Options

Are High Quality Vendors Waiting Around For Your Project To Hit The Street???



Reality

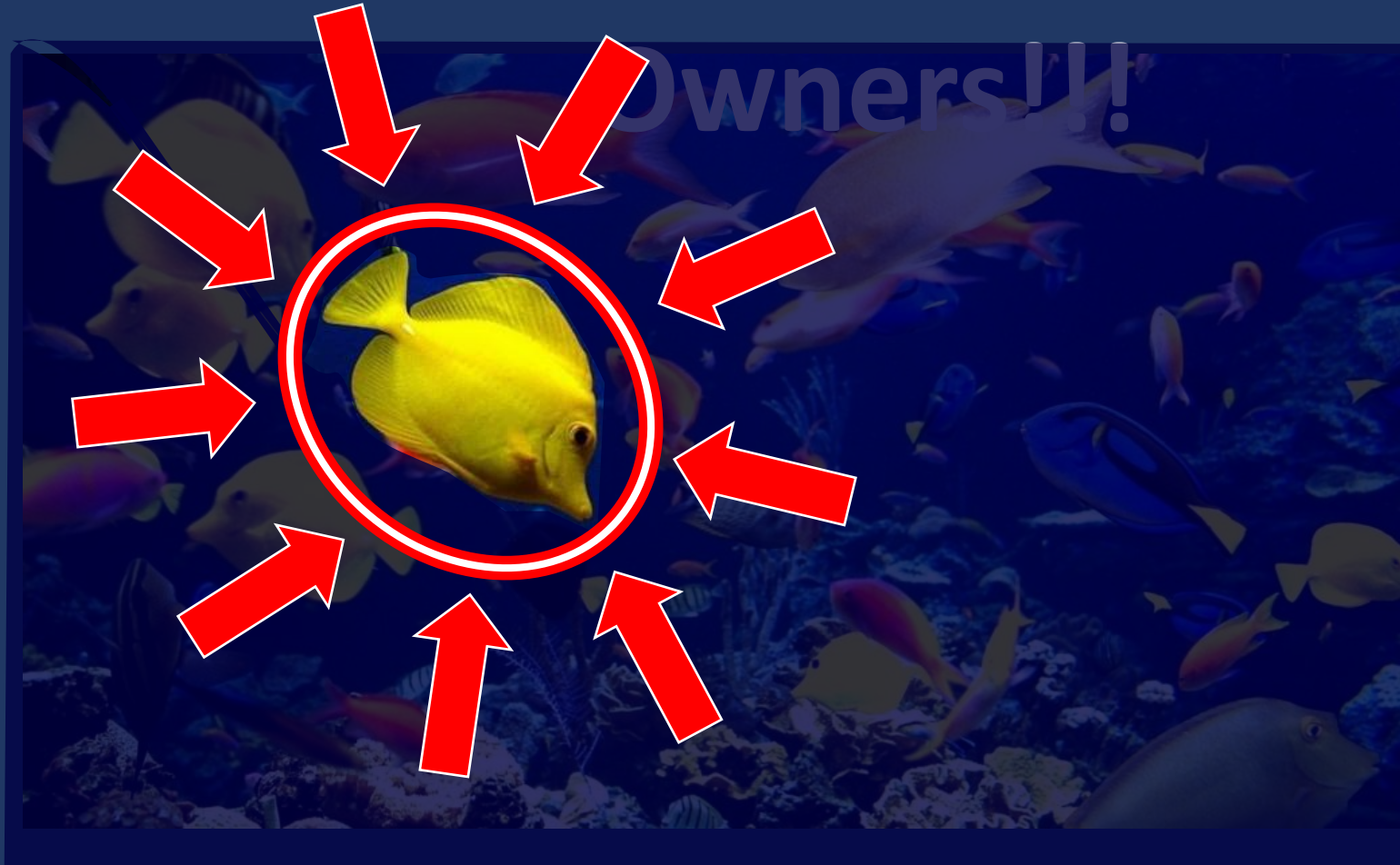
- Most high quality vendors/suppliers are in high demand / busy
- High quality vendors/suppliers are not just sitting around all year for the “hope” that your organization will issue a solicitation
- Vendors are constantly looking at opportunities (outside of your organization)

Understanding Supplier Perspectives
Many Times We Forget...

You Are Not The Only “Fish” In The Sea... Vendors Have Options!



Your Goal: You Want To Look More Attractive Than All Other Current



If You Look Dangerous....





Your *“Name”* Doesn't Matter

*Everyone Wants
To Work With
Us!!!*



Relying on your organizations
name is a poor strategy



Proposals Cost Money



Suppliers Don't Have Unlimited Funds

Proposing Costs Money

- Suppliers can't afford to propose on solicitations for fun
- Responding to RFP's costs money and resource
- Suppliers make a business decision on whether your solicitation is 'worth' the effort to propose

Simple Things To Consider

Attracting Suppliers

- Step 1 – Have a “good” name/title of the RFP

Registration

The screenshot shows the DGS Procurement Division website. The header includes the DGS logo, navigation links (HOME, SERVICES, FORMS, RESOURCES, NEWS, EVENTS, ABOUT, CONTACT), and a search bar. The main content area features the title "Cal eProcure Portal to Access Bid Opportunities" and a sub-header "Learn about the portal to access bid opportunities with the state of California." Below this, there is a section titled "CAL EPROCURE" with the subtitle "California's Online Marketplace" and a button "GO TO CAL EPROCURE WEBSITE". The text describes the portal as California's new online marketplace designed to improve the experience of businesses selling products and/or services to the State. It mentions that the portal replaced BidSync and provides access to bidding and contracting resources. It also states that the portal provides access to the California State Contracts Register (CSCR), the State Contracting and Procurement Registration System (SCPRS), Small Business and Disabled Veteran Business Enterprise (SB/DVBE) certification and queries, and the statewide

- How many agencies have their own eProcurement system?
- Local firms may be registered with the State's system
- Larger/National firms cannot afford to register with every Public organization across the country

National Solicitation Warehouse

- Larger/National firms will pay for and utilize procurement search engines that collect solicitations throughout the country
- Provides hourly updates on posted solicitations
- Thousands of solicitations

BidPrime

The screenshot displays the BidPrime website interface. At the top, there is a navigation bar with the BidPrime logo and links for INBOX, SEARCH, REPORTS, SETTINGS, and SUPPORT. The main content area features a dark green background with white text. A headline reads: "Searching for bid documents was the most challenging aspect of public bidding. We solved that." Below this, a sub-headline states: "BidPrime is your only resource for Docs on Demand and DocSearch." Two bullet points highlight key features: "✓ Access almost any bid document in 1 click." and "✓ Easily search within bid specifications for key terms." There are two call-to-action buttons: "Try Free" and "Request Demo", both with "Learn more" links. On the right side, there is a preview of the document search interface, showing a search bar, a search result for "03-0984996.pdf", and a list of "All Documents" with a "Download All" button. A play button icon is overlaid on the document preview, suggesting a video or interactive content.

BidPrime INBOX SEARCH REPORTS SETTINGS SUPPORT

SAVED SEARCH

AGENCIES

United States [All States & Territories](#)

State and Local (984)

Canada [All Provinces](#)

Canada (159)

Filter Agency Type

DATE RANGE

Active

ADVANCED

Q

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← Page 1 of 46 → 1000+ Results Show 25

Suppliers Can Be Reviewing **1,000** RFP's per Week



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<input type="checkbox"/>	REQUEST F...	REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES RELATED to the DESIGN of a Shared ...	The Columbian	WA	6/24/2022	5 hours ago
<input type="checkbox"/>	Request for ...	Request for Proposals No. 22P0079MG: Janitorial Services – UAF Kodiak	State of Alaska	AK	6/15/2022	5 hours ago
<input type="checkbox"/>	2863898-05...	☺ Request for Proposal - Event Cleaning - Neyland Stadium Attachments Request for Proposal - N...	University of Tennessee	TN	6/1/2022	6 hours ago
<input type="checkbox"/>	2022-9175246	UNICEF Request for Proposal No. 2022-9175246 Long Term Arrangements for Emergency Water Se...	United Nations Global Marketplace...	NY	6/12/2022	6 hours ago
<input type="checkbox"/>	12989929 R...	✉ Request for Proposal for Traffic Agent (Special Constable) Training Development and Delivery (L...	Government of Canada - Central C...	AB	6/14/2022	6 hours ago
<input type="checkbox"/>	Request for ...	#EWM151: Enrollment Consultant- UIC School of LawUniversity of Illinois at Chicago RFP #EWM15...	University of Illinois at Chicago	IL	6/29/2022	6 hours ago
<input type="checkbox"/>	Request For ...	Request for Proposals Bristol Tennessee City Schools, 615 Martin Luther King Jr. Blvd., Bristol, TN Wi...	Bristol Herald Courier	VA	6/8/2022	6 hours ago
<input type="checkbox"/>	Request for ...	NOTICE Bland County Public Schools Is Requesting the Following Proposals: RFP 2022-1 Milk, Juice ...	Bristol Herald Courier	VA	6/9/2022	6 hours ago
<input type="checkbox"/>	REQUEST F...	Request for Proposal #22-13: Indefinite Delivery/indefinite Quantity Low Voltage Work	Rockdale Citizen & Newton Citizen	GA	6/24/2022	7 hours ago

Avoid Long or Vague Titles

- *Request for Proposals for the Alexander Goldwater Improvement Center Construction Documents Preparation*

Avoid Long or Vague Titles

- ~~*Request for Proposals for the Alexander Goldwater Improvement Center Construction Documents Preparation*~~

Avoid Long or Vague Titles

- *City of Nashville Request for Proposals for Suppliers that can perform Needs Assessments*

Avoid Long or Vague Titles

- ~~City of Nashville Request for Proposals for Suppliers that can perform Needs Assessments for Food Services~~

Attracting Suppliers

- Step 1 – Have a “good” name/title of the RFP
- Step 2 – Simplify the posted documents/files

Enterprise Resource Planning System

Fort Bend ISD, TX #RFP-21-077MC

 View

 Source

Keywords

Snippets
















































Erp Consulting

Docs On Demand

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Agency Contact Info 

Reference #: RFP-21-077MC **Alert:** Erp Consulting

- Documents:**  Appendix A-Vendor ...  Appendix A-Vendor ...  Appendix B-Support ...  Appendix D-Purchas...  Appendix E-Bonds R...  Appendix F-TRS Re...  Appendix H-CFO Fin...  Data Conversion Co...
 Appendix G-FBISD ...  Data Protection Add...  RFP 21-077MC-Pre...  UPDATED 2020 ED...  Appendix F-TRS Re...  RFP 21-077MC- Bon...  RFP 21-077MC - SO...  RFP 21-077MC - Ad...
 RFP 21-077MC - Ad...  RFP 21-077MC - Ad...  Proposal Exemption...  Appendix C- Sample...  Pre-Proposal Meetin...  Insurance Requirem...  FBISD - Agreement f...  General Provisions.p...  Form ACH.pdf
 Form 1295.pdf  FBISD - Agreement f...  Data Protection Add...  Data Conversion Co...  Appendix G-FBISD ...  Appendix H-CFO Fin...  Appendix E-Bonds R...  Appendix D-Purchas...  Appendix B-Support ...
 Appendix A-Vendor ...  Appendix A-Vendor ...  Form 1295.pdf  Form ACH.pdf  Appendix C- Sample...  General Provisions.p...  Pre-Proposal Meetin...  Proposal Exemption...  Insurance Requirem...
 RFP 21-077MC - Ad...  RFP 21-077MC - Ad...  RFP 21-077MC - Ad...  RFP 21-077MC - SO...  RFP 21-077MC- Bon...  UPDATED 2020 ED...  RFP 21-077MC-Pre...

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Which File Contains The RFP?

Project Management Information System SaaS and Implementation

Great Lakes Water Authority

[View Bid](#) [View Source](#) [Save Bid](#) [Email Bid](#)

Reference #: RFP - 2101347 **Alert:** System Implementation

Documents: [2101347.Addendum...](#) [2101347.Administrat...](#) [2101347.Administrat...](#) [2101347.Procureme...](#) [2101347.ContractSa...](#) [B.I.D.Requirements...](#) [2101347.Solicitation...](#) [ExceptionChecklist.p...](#)
[ExceptionChecklist1...](#) [SystemRequirement...](#) [ExceptionChecklist1...](#) [2101347.Administrat...](#) [2101347.Administrat...](#) [SystemRequirement...](#) [B.I.D.Requirements...](#) [ExceptionChecklist.p...](#)
[2101347.Addendum...](#) [2101347.Procureme...](#) [2101347.Solicitation...](#) [SystemRequirement...](#) [ExceptionChecklist1...](#) [ExceptionChecklist.p...](#) [B.I.D.Requirements...](#) [2101347.Procureme...](#)
[2101347.ContractSa...](#) [2101347.Addendum...](#) [2101347.Administrat...](#) [2101347.Solicitation...](#) [2101347.Administrat...](#) [GLWA-2022-2026-CI...](#) [GLWA-2022-2026-CI...](#)

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RFP - 2101347 Project Management Information System SaaS and Implementation Aug 15th 2021, 12:00 PM EDT 10 View Opportunity

Which File Contains The RFP?

Project Management Information System SaaS and Implementation
Great Lakes Water Authority

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Reference #: RFP - 2101347 **Alert:** System Implementation

Documents: [2101347.Addendum...](#) [2101347.Administrat...](#) [2101347.Administrat...](#) [2101347.Procureme...](#) [2101347.ContractSa...](#) [B.I.D.Requirements...](#) [2101347.Solicitation...](#) [ExceptionChecklist.p...](#)
[ExceptionChecklist1....](#) [SystemRequirement...](#) [ExceptionChecklist1....](#) [2101347.Administrat...](#) [2101347.Administrat...](#) [SystemRequirement...](#) [B.I.D.Requirements...](#) [ExceptionChecklist.p...](#)
[2101347.Addendum...](#) [2101347.Procureme...](#) [2101347.Solicitation...](#) [SystemRequirement...](#) [ExceptionChecklist1....](#) [ExceptionChecklist.p...](#) [B.I.D.Requirements...](#) [2101347.Procureme...](#)
[2101347.ContractSa...](#) [2101347.Addendum...](#) [2101347.Administrat...](#) [2101347.Solicitation...](#) [2101347.Administrat...](#) [GLWA-2022-2026-CI...](#) [GLWA-2022-2026-CI...](#)

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1. RFP (210347)
2. Appendix A (210347)
3. Appendix B (210347)
4. Appendix C (210347)

Attracting Suppliers

- Step 1 – Have a “good” name/title of the RFP
- Step 2 – Simplify the posted documents/files
- Step 3 – Don't make the document difficult to read

Don't Make It Difficult To Read

APPENDIX E – PROJECT DESCRIPTION

AUDIT AND ACCOUNTABILITY FUND

Service Delivery and Modernization Review of Development Review

Project Purpose

The purpose of this project is to take advantage of a provincial funding opportunity through the Audit and Accountability fund to conduct a third-party service delivery and modernization review of the City's development review processes. This review will help the City become more efficient and modernize our service delivery, while protecting front line jobs.

Project Objective

Streamlining development review processes through an end-to-end digital integration and transformation solution

The objective of this development review project is to review and recommend an end-to-end integrated digital transformation solution for development review and approvals processes that eliminates paper-based processes and non-value-added steps, while leveraging existing software (e.g. Bluebeam, AMANDA) and other City of Kitchener project outcomes.

Background

Audit and Accountability Fund

On November 17, 2020 the Province of Ontario announced a second intake for the Audit and Accountability Fund. The intent of the fund is to "offer large municipalities an opportunity to benefit from provincial funding to conduct service delivery and administrative expenditure reviews."

Reviews must be undertaken by a third-party and may take a number of forms including a line-by-line review of the municipality's entire budget; a review of service delivery and modernization opportunities; or a review of administrative processes to reduce costs.

Project Selection

The modernization of development review processes was chosen to supplement the City's development services review which was undertaken from June 2019 to December 2020.

City of Kitchener Development Services Review

Kitchener is growing quickly, and the development services department plays a vital role in how our community develops today and in the future. A comprehensive review of development services was launched in 2019. The purpose of the development services review was to look at how development functions interact and are coordinated, and to identify whether that

Appendix A – Registration Form

TO : Independent Electricity System Operator

FROM : [Insert Name of Proponent]

RE : Fairness Advisor Services

Password

'RFP-324 Fairness Advisor...' is protected. Please enter a Permissions Password.

Enter Password:

OK Cancel

(c) If applicable, the jurisdiction under which the Proponent was formed and governed by is:

(d) The name, address, telephone number and e-mail address of the contact person for the Proponent is:

(e) Whether the Proponent is an individual, a sole proprietorship, a corporation, a partnership, or other legally recognized person (specify):

Attracting Suppliers

- Step 1 – Have a “good” name/title of the RFP
- Step 2 – Simplify the posted documents/files
- Step 3 – Don’t make the document difficult to read
- Step 4 – Consider the amount of work for the size of the project

Respond to 20 Items...

Requested Information:

Listed below are the documents and information needed to complete your submission:

Name	Type	# Files	Requirement
REQUIREMENTS SCHEDULE	File Type: Any (*.*)	Multiple	REQUIRED
Excutive Summary	File Type: Any (*.*)	Multiple	REQUIRED
Corporate Overview	File Type: Any (*.*)	Multiple	REQUIRED
Guarantee	File Type: Any (*.*)	Multiple	REQUIRED
Preferred Terms	File Type: Any (*.*)	Multiple	REQUIRED
Resource Requirements	File Type: Any (*.*)	Multiple	REQUIRED
Quality of Work Plan	File Type: Any (*.*)	Multiple	REQUIRED
Project Management Process	File Type: Any (*.*)	Multiple	REQUIRED
Proposed Timelines	File Type: Any (*.*)	Multiple	REQUIRED
Samples/Templates	File Type: Any (*.*)	Multiple	REQUIRED
Reference Schedule	File Type: Any (*.*)	Multiple	REQUIRED
Purchase Price Schedule	File Type: Any (*.*)	Multiple	REQUIRED
Purchase Price Appendix	File Type: Excel (.xls, .xlsx)	Multiple	REQUIRED
BID SUBMISSION FORM SCHEDULE	File Type: Any (*.*)	Multiple	REQUIRED
FULL DISCLOSURE OF FINANCIAL CONTRIBUTION SCHEDULE	File Type: Any (*.*)	Multiple	REQUIRED
Legal Action Schedule	File Type: Any (*.*)	Multiple	REQUIRED
Auxiliary	File Type: Any (*.*)	Multiple	OPTIONAL
PERSONAL HEALTH INFORMATION SCHEDULE	File Type: Any (*.*)	Multiple	REQUIRED
SPECIFICATIONS SCHEDULE	File Type: Any (*.*)	Multiple	REQUIRED
NH Confidentiality Conflict of Interest	File Type: Any (*.*)	Multiple	REQUIRED

Respond to 20 Items...

For Chance At Winning \$25K

Requested Information:

Listed below are the documents and information needed to complete your submission:

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REQUIREMENTS SCHEDULE	File Type: Any (*.*)	Multiple	REQUIRED
Excutive Summary	File Type: Any (*.*)	Multiple	REQUIRED
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Reference Schedule	File Type: Any (*.*)	Multiple	REQUIRED
Purchase Price Schedule	File Type: Any (*.*)	Multiple	REQUIRED
Purchase Price Appendix	File Type: Excel (.xls, .xlsx)	Multiple	REQUIRED
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FULL DISCLOSURE OF FINANCIAL CONTRIBUTION SCHEDULE	File Type: Any (*.*)	Multiple	REQUIRED
Legal Action Schedule	File Type: Any (*.*)	Multiple	REQUIRED
Auxiliary	File Type: Any (*.*)	Multiple	OPTIONAL
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SPECIFICATIONS SCHEDULE	File Type: Any (*.*)	Multiple	REQUIRED
NH Confidentiality Conflict of Interest	File Type: Any (*.*)	Multiple	REQUIRED

...Why Aren't
More Suppliers
Responding To
Our RFP's??



Attracting Suppliers

- Step 1 – Have a “good” name/title of the RFP
- Step 2 – Simplify the posted documents/files
- Step 3 – Don’t make the document difficult to read
- Step 4 – Consider the amount of work for the size of the project
- Step 5 – Understand what information is most critical to Suppliers

Most Important Items To The Supplier?

- Definitions
- Prohibited Communication
- Rights of the Client
- Rights to Clarify
- Conflict of Interest
- Unethical Conduct
- Terms and Conditions of the RFP
- Security Checks
- Governing Laws
- Following Instructions
- Withdrawing Proposals
- Addenda
- Disclosure Information
- Tax Responsibilities
- Protest procedures

Most Important Items To The Supplier?

- ✘ Definitions
- ✘ Prohibited Communication
- ✘ Rights of the Client
- ✘ Rights to Clarify
- ✘ Conflict of Interest
- ✘ Unethical Conduct
- ✘ Terms and Conditions of the RFP
- ✘ Security Checks
- ✘ Governing Laws
- ✘ Following Instructions
- ✘ Withdrawing Proposals
- ✘ Addenda
- ✘ Disclosure Information
- ✘ Tax Responsibilities
- ✘ Protest procedures

...So What Are The Most
Important Items To The
Supplier?

<< WORKSHOP >>

Instructions:

- Review 3 RFP's
- Assume you are a vendor and reviewing from the perspective of a vendor
- Identify your overall impression with each RFP
 - How easy was it to follow?
 - What did you like, what didn't you like?
 - Were there any issues or anything that is missing?
 - If you were 'grading' it, what would you give it (Scale = A-F)

1

Western University

Discussion

1. How easy was it to follow?
2. What did you like, what didn't you like?
3. Were there any issues or anything that is missing?
4. If you were 'grading' it, what would you give it (Scale = A-F)

Student Comments - Western

- Criteria and weights did not match up (Section 3.2 vs Exhibit E-6)
- No weights for presentations (E7)
- Looking to get everything for free
- No format to submit requirements in Exhibit E3
- Unclear if there is anything more important or critical in E3
- Unclear how existing services are performing
- Back and forth between general procurement requirements versus scope of work versus proposal process
- Appears that the University will award to whomever donates the most clothes and money

Student Comments - Weste

Average
Grade:

C-

- Back and forth between general procurement requirements versus scope work versus proposal process
- Criteria and weights did not match up (Section 3.2 vs Exhibit E-6)
- No format to submit requirements in Exhibit E3
- Unclear if there is anything more important or critical in E3
- Unclear how existing services are performing
- No weights for oral presentations (E7)
- Looking to get everything for free
- Appears that the University will award to whomever donates the most clothes and money

2

University

Student Comments

- Unclear what the scope is
- Proposal response will be thousands of pages (Section II-C)
- How will University evaluate and score the software license agreement
- How will all of the functional and technical requirements be evaluated and scored?
- No budget
- No weights (unclear what is the most important criteria to University)

Student Comments

- Unclear what the scope is
- Proposal response will be thousands of pages (Section II-C)
- How will University evaluate and score the software license agreement
- How will all of the functional and technical requirements be evaluated and scored?
- No budget
- No weights (unclear what is the most important criteria to University)

Average
Grade:

D

3

Amazon

Student Comments - Amazon

- No criteria or weighting structure
- Unclear how proposals will be evaluated
- Unclear on what exactly needed to be submitted
- Unclear how to win the award
- Assumed that Owner had already picked a winner
- No standardized submittal forms

Student Comments - Amazon

Average
Grade:

F

- No criteria or weighting structure
- Unclear how proposals will be evaluated
- Unclear on what exactly needed to be submitted
- Unclear how to win the award
- Assumed that Owner had already picked a winner
- No standardized submittal forms

4

General Electric

Case Study

- 68 files (word, excel, pdf, powerpoint)
- No structure
- Not logical / difficult to follow
- Schedule in 4 different files
- Criteria in 2 different files
- No weights
- No budget

Name	Type	Size	Date Modified	Shared By
1.0-00-ABSTRACT-001	Word Document	69 KB	2014-04-23 18:18:50	Parag Desai
2.0-00-ABSTRACT-002	Word Document	32 KB	2014-06-30 10:40:30	Parag Desai
3.0-00-ABSTRACT-003	PDF File	82 KB	2014-04-23 14:52:40	Parag Desai
4.0-00-ABSTRACT-004	Word Document	80 KB	2014-04-23 14:52:50	Parag Desai
5.0-00-ABSTRACT-005	Word Document	179 KB	2014-04-23 14:53:10	Parag Desai
6.0-00-ABSTRACT-006	Word Document	165 KB	2014-04-23 14:53:21	Parag Desai
7.0-00-ABSTRACT-007	Word Document	28 KB	2014-04-23 14:53:24	Parag Desai
8.0-00-ABSTRACT-008	Word Document	12 KB	2014-04-23 14:53:28	Parag Desai
9.0-00-ABSTRACT-009	PDF File	6 KB	2014-04-23 14:54:00	Parag Desai
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14.0-00-ABSTRACT-014	PDF File	33 KB	2014-04-09 10:22:47	Parag Desai
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27.0-00-ABSTRACT-027	PDF File	81 KB	2014-04-23 18:13:10	Parag Desai
28.0-00-ABSTRACT-028	Word Document	32 KB	2014-04-23 18:13:20	Parag Desai
29.0-00-ABSTRACT-029	Word Document	39 KB	2014-06-01 17:09:54	Parag Desai
30.0-00-ABSTRACT-030	PDF File	102 KB	2014-04-23 18:13:44	Parag Desai
31.0-00-ABSTRACT-031	Word Document	63 KB	2014-04-23 18:13:50	Parag Desai
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46.0-00-ABSTRACT-046	Word Document	81 KB	2014-04-23 18:15:30	Parag Desai
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50.0-00-ABSTRACT-050	Word Document	40 KB	2014-04-23 18:15:38	Parag Desai
51.0-00-ABSTRACT-051	Word Document	47 KB	2014-04-23 18:15:40	Parag Desai
52.0-00-ABSTRACT-052	Word Document	44 KB	2014-04-23 18:15:42	Parag Desai
53.0-00-ABSTRACT-053	Word Document	82 KB	2014-04-23 18:15:44	Parag Desai
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56.0-00-ABSTRACT-056	Word Document	80 KB	2014-04-23 18:15:50	Parag Desai
57.0-00-ABSTRACT-057	Word Document	38 KB	2014-04-23 18:15:58	Parag Desai
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68.0-00-ABSTRACT-068	Word Document	48 KB	2014-04-23 18:16:02	Parag Desai

Current Evaluation Criteria

1. **General Information:** Company size, revenue, number of employees, comparative references, etc
2. **Pricing:** Submit all pricing in excel format using format in Exhibit H
3. **Safety Program:** Submit a complete copy of your safety program including all policies, procedures, forms, training records, certifications and permits used to ensure the safety of workers, subcontractors and other personnel. Submit a copy of your accident / injury log for the previous 24 months. Provide names and qualifications of dedicated safety personnel to be assigned to the project. Note: A general safety plan is required to support the Tender. Prior to construction, a project specific safety plan will be required and approved by the local Representative.
4. **Project Organization Chart with Resumes of Key Personnel:** Submit an organization chart with personnel names and roles for key personnel showing the working relationship of all team members to be assigned to the project. Provide resumes for all key personnel listed on organization chart. Chart must include at a minimum supervisory, safety, technical, quality and document control personnel.
5. **Quality Control Program:** Listing all quality control procedures including document control as well as any applicable quality system certifications and internal audit results.
6. **Site Security Program:** Submit a security plan that details how the construction site and works will be protected over the course of the project. The plan must include securing against unauthorized access to the site, removal of materials and equipment as well as protection of safety hazards to unsuspecting persons.

Current Evaluation Criteria

- The identification of the best-fit contractor assuming the EPC responsibility is following a methodical process by evaluating the bidders on a combination of critical success criteria.
- 1. **Contractor Competiveness:** The competitive bid process will challenge the bidder to be fully aware of the market conditions when quantifying the construction costs for material and labor.
- 2. **Contractor Localization:** The client is committed to achieve a high level of local utilization. The bidders need to comply 100% with the Local Content Act. Following specifics are defined. “Local Content is the quantum of composite value added to, or created in, the local economy through a deliberate utilization of local human and material resources and services in the exploration, development, exploitation, transportation and sale of Local crude oil and gas resources, without compromising quality, health, safety and environmental standards”.
- 3. **Contractor Capability:** The Capability to deliver the project is a critical section criterion. The bidder will have the opportunity to provide sufficient data showing suitable references on previous executed projects. Further ongoing projects can be good references demonstrating contractor capability and qualifications. The client reserves the right to visit current construction sites, which are listed in the bidder response

...So What Are The Most
Important Items To The
Supplier?

1. *Can I Provide What You Need?*

- SOW
- Budget
- Schedule

1. Can I Provide What You Need?

- SOW
- Budget
- Schedule

2. *What Are The Odds That I Can Win?*

- Perceptions of being open, fair, and transparent
- Criteria & weights

1. Can I Provide What You Need?

- SOW
- Budget
- Schedule

2. What Are The Odds That I Can Win?

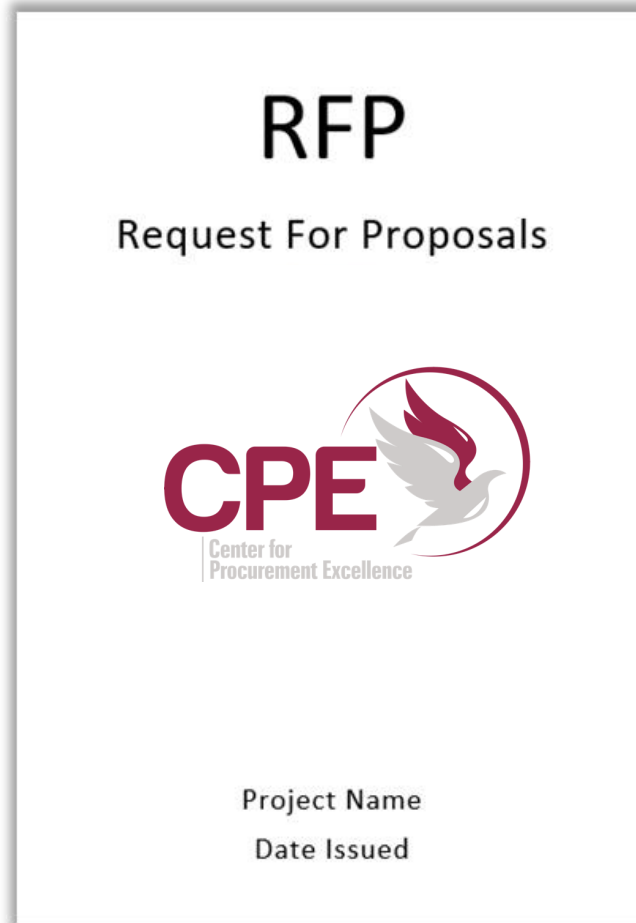
- Perceptions of being open, fair, and transparent
- Criteria & weights

3. ***How Much Effort Will It Take To Respond***

- Proposal contents

RFP Formatting Suggestions

Solicitations Contents



Solicitations
generally contain
“5” major sections

Solicitations Contents



1

Scope of Work

What The Awarded Supplier Will Do

2

Evaluation Procedures

3

Proposal Instructions

4

Administrative Requirements

5

Submittal Forms & Attachments

Solicitations Contents



1

Scope of Work

2

Evaluation Procedures

How We Will Pick

3

Proposal Instructions

4

Administrative Requirements

5

Submittal Forms & Attachments

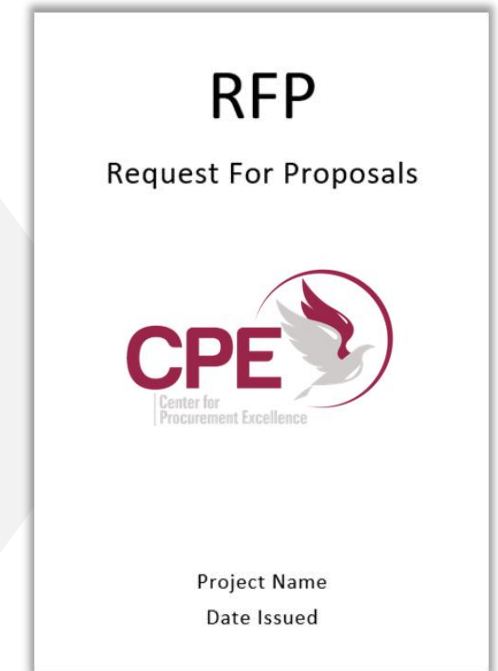
Evaluation Topics

1. Criteria
2. Weights
3. Scoring Procedures

RFP Criteria

Selection & Award

- *Schedule / Duration*
- *Past experience*
- *Resumes of staff*
- *Methodology & Approach*
- *Service approach*
- *MWBE requirements*
- *Technical requirements*
- *Financial capabilities*
- *Depth of resources*
- *Quality Control Plan*
- *Subcontractor plan*
- *Staffing plan*
- *Safety plan*
- *Technology experience*
- *Bonding and Insurance*
- *Warranty's*
- *Claims and litigation history*



Sample Criteria

1. Cost proposal
2. Provide relevant information that demonstrates the company's financial ability to perform the project.
3. Include information as to debt, financial resources, bonding company, bonding capacity, Dun and Bradstreet ratings, etc.
4. Describe any litigation, arbitration, or mediation initiated by your firm (or by some other party on your behalf such as a General Contractor) in the past 5 years involving claims for additional cost that...
5. Describe your safety plan and risk management strategy.
6. Provide an overview of your project specific safety program and the initiatives your company will be taking.
7. Describe the company's recent experience with (similar) projects, and specifically describe how this experience will add value for this project.
8. Provide references from three (3) previous contractors and architect/owner (minimum of 3 examples).
9. Provide example cost estimates from past projects to demonstrate expertise and ability to accurately predict costs.
10. Describe the depth of resources of the company (number of personnel, size and locations of shops, shop capacity, innovative technologies used by the firm, etc.).
11. Provide a detailed description of your management approach to this project.
12. Provide an organizational chart for your company's approach to this project.
13. Provide a listing of the key individuals that will provide project management oversight and their level of involvement (total hours).
14. Include resumes for each individual.
15. Provide a brief description of roles and responsibilities of the key individuals that will be assigned to provide construction services (including project managers, quality control inspectors, safety director, site supervision, etc.).
16. Provide an overview of anticipated utilization of non-productive foremen and how the field work will be serviced.
17. Outline your company's construction plan and approach which demonstrates commitment to successful and timely completion.
18. Highlight specific areas of work / activities that are critical to schedule adherence. Describe approach to manage these activities to ensure on-time delivery.
19. Describe your methodology for establishing and managing a CPM. What is your approach to managing risks and the execution of the CPM?
20. Describe how your company plans to measure and track the productivity of the labor force and report those figures on a regular basis.
21. Identify areas from similar past projects where productivity was adversely affected and explain how your company adjusted to rectify the situation.
22. Propose an incentive program for your company's efforts to increase productivity/efficiencies
23. Describe your firm's experience with Building Information Modeling (BIM).
24. Describe any specific recommendations for prefabrication or modularization.

Why Do Clients Ask For So Much???

Why Do Clients Want So Much?

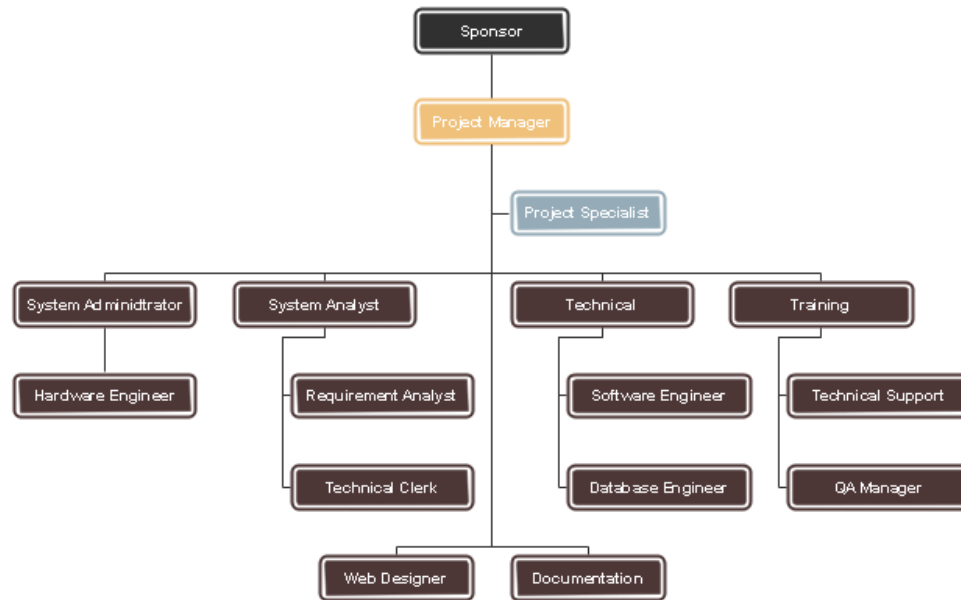
1. That is what we asked for in the past
2. Best guess at what we think we should ask
3. We are trying to avoid mistakes from past projects

More Is Not Always Better!

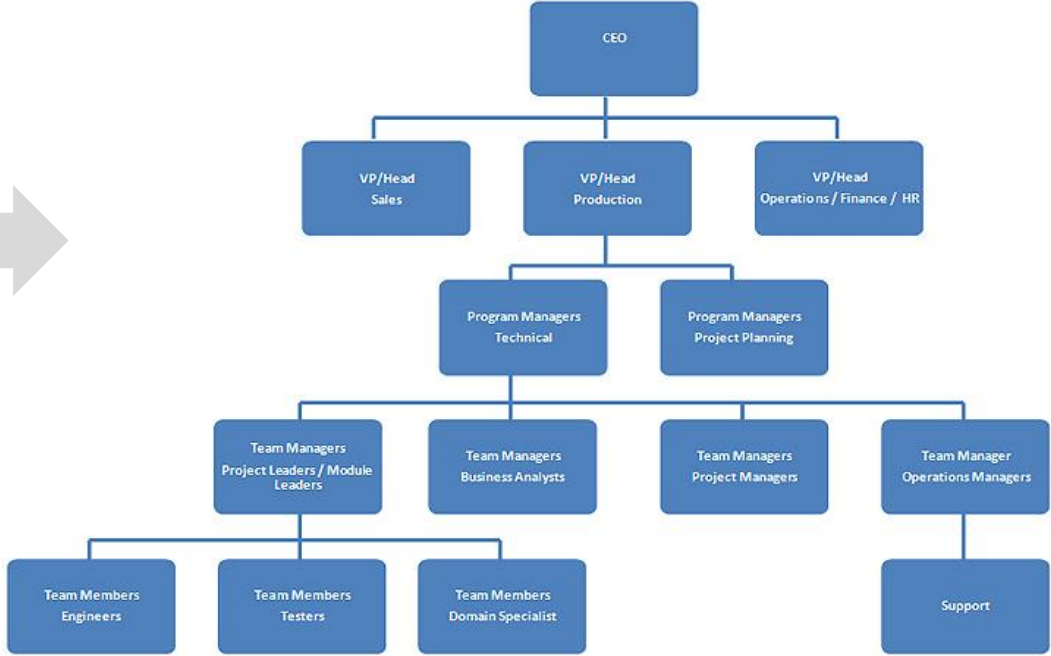
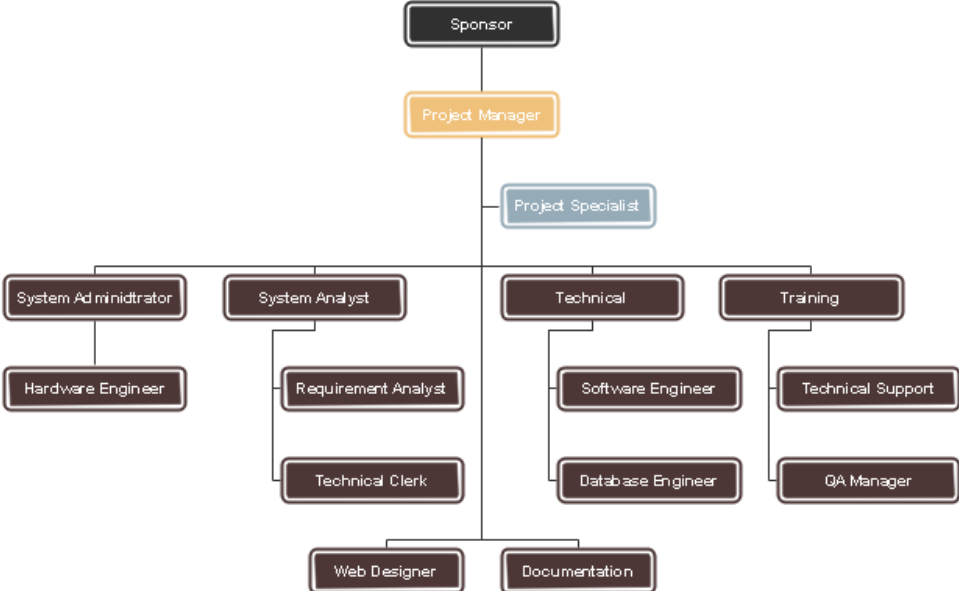


Example: Org Chart Evaluation

Example: Org Chart Evaluation



Example: Org Chart Evaluation



Ex: Staffing Plan

Role	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12	W13	W14	W15	W16	W17	W18	W19	W20	W21	W22	W23	W24	W25	W26	W27	W28	
Program Manager	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	0	0	0	0
Architect	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Software Developer						6	6	6	6	6	6	6	6	6	3	3	3	2	2	1	1	1	1	1	1	1	1	1	1
UX Architect	1	1	1	1	1	1	1	1	1	1	1	0	0																
Database Architect		1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1					
Integration Architect	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Software Lead						1	2	2	2	2	2	2	2	2	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Software Tester	1	1	1	2	2	2	3	3	3	3	3	3	3	3	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
Functional Lead				1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	0	0		
Business Analyst	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Project Manager	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1

11 personnel

Case Study

(High Tech Facility - \$ Billion)

Case Study

(High Tech Facility - \$ Billion)

Contents included:

1. Cost
2. BIM Experience
3. Capacity
4. Innovation
5. Prefab
6. CX, QA, QC Processes
7. Management Approach
8. GMP Management
9. Cost Control Approach
10. Similar Experience
11. Contract Exceptions
12. Goals
13. KPI
14. Insurance
- 15. Safety Plan**

Case Study

(High Tech Facility - \$ Billion)

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Time Spent Evaluating:

2.5 Weeks

Case Study

(High Tech Facility - \$ Billion)

Contents included:

1. Cost
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5. Prefab
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7. Management Approach
8. GMP Management
9. Cost Control Approach
10. Similar Experience
11. Contract Exceptions
12. Goals
13. KPI
14. Insurance
- 15. Safety Plan**



Time Spent Evaluating:

2.5 Weeks

Deviation in Safety Plan Score:

1.52%





Not All Criteria Is Useful At Differentiating!

Types of Criteria

Not-Scored

Criteria that is used to verify & validate the supplier

Vendor A = 9.1

Vendor B = 9.2

Vendor C = 9.3



Types of Criteria

- This information should be requested from the top-ranked supplier only (during negotiation)
- This information is reviewed and negotiated prior to award

Not-Scored

Criteria that is used to verify & validate the supplier

Vendor A = 9.1

Vendor B = 9.2

Vendor C = 9.3



Types of Criteria

Scored

Criteria that is used to differentiate suppliers

Vendor A = 3.1
Vendor B = 6.7
Vendor C = 9.2

1-10

Not-Scored

Criteria that is used to verify & validate the supplier

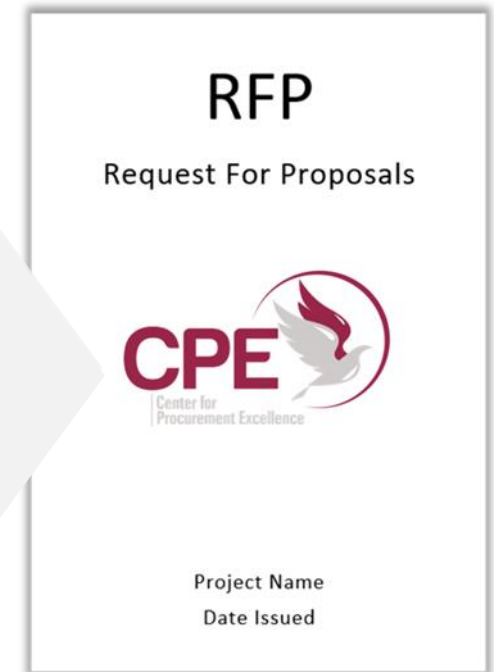
Vendor A = 9.1
Vendor B = 9.2
Vendor C = 9.3

P/F

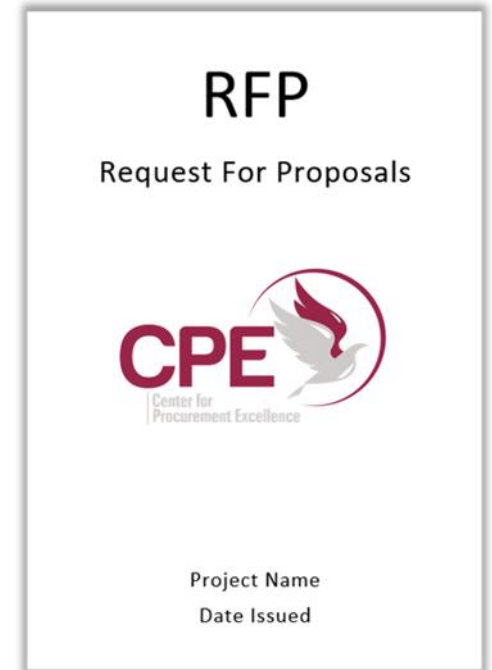
RFP Criteria

Selection & Award

- 
- *Schedule / Duration*
 - *Past experience*
 - *Resumes of staff*
 - *Methodology & Approach*
 - *Service approach*
 - *MWBE requirements*
 - *Technical requirements*
 - *Financial capabilities*
 - *Depth of resources*
 - *Quality Control Plan*
 - *Subcontractor plan*
 - *Staffing plan*
 - *Safety plan*
 - *BIM experience*
 - *Bonding and Insurance*
 - *Warranty's*
 - *Claims and litigation history*

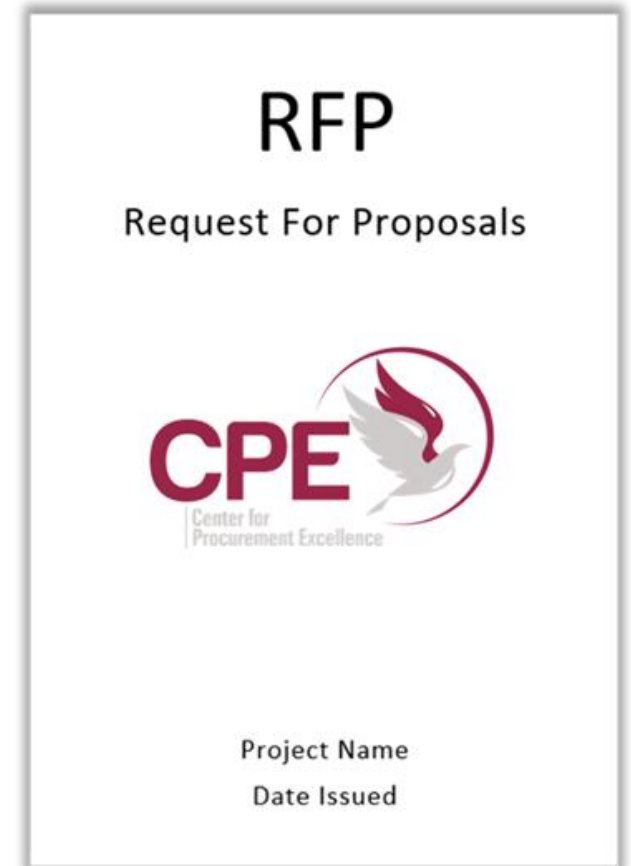


3 Core Factors



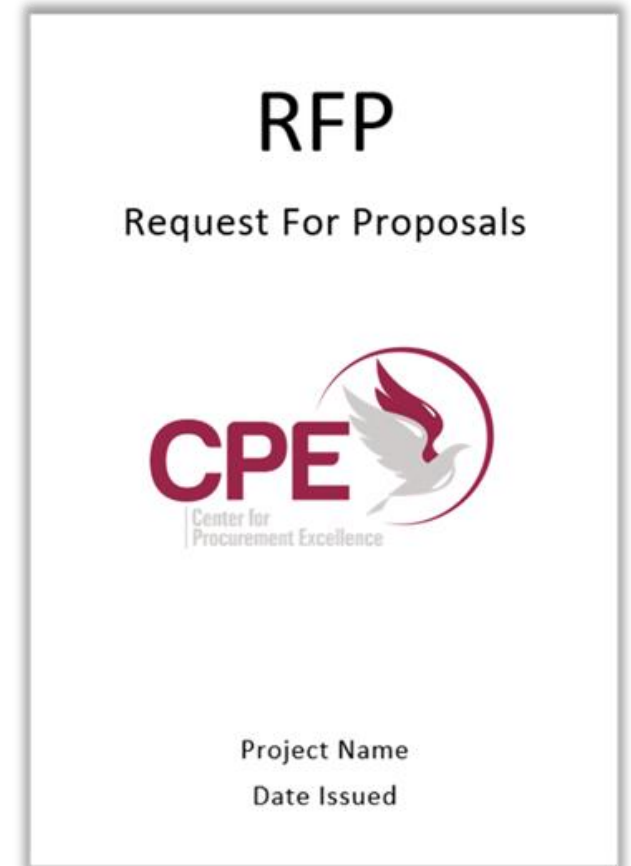
3 Core Factors

1. *Financial Proposal (Cost)*



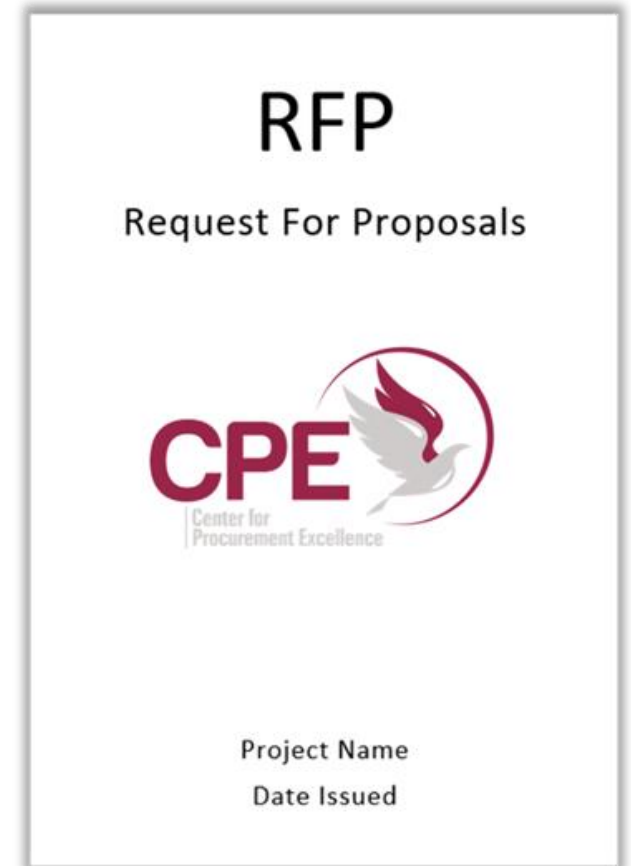
3 Core Factors

1. *Financial Proposal (Cost)*
2. *Preferences*



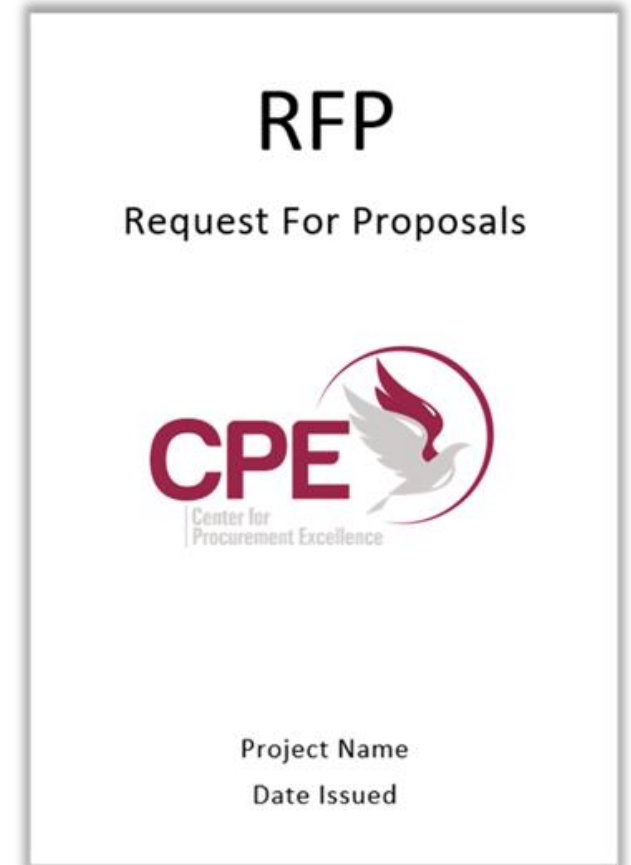
3 Core Factors

1. *Financial Proposal (Cost)*
2. *Preferences*
3. *Technical Proposal*



2 Core Subfactors


1. *Financial Proposal (Cost)*
2. *Preferences*
3. *Technical Proposal*
 - *Past Experience*
 - *Current Capabilities*



2 Core Subfactors

1. **Financial Proposal (Cost)**
2. **Preferences**
3. **Technical Proposal**
 - **Past Experience**
 - *References*
 - *Surveys*
 - *Qualifications*
 - **Current Capabilities**
 - *Approach & Methodology*
 - *Solution & Workplan*
 - *Schedule*

RFP
Request For Proposals



Project Name
Date Issued

Remember ... The Goal Is Less



Recognize Evaluator Bias

Case Study – Software Upgrade

- State Agency – Statewide Tax System
- SME conducted research to determine the ‘right’ solution for their needs
- Understood that ‘data warehousing’ was most important item
- Educated other evaluators that only one firm really had the capacity
- 3 vendors proposed and all 3 were interviewed

Evaluator Bias

- Bias is not always so “forward” or “shocking”
- Usually, bias comes from Evaluators who:
 - Think they “already know” the best vendor
 - Look at logo/brand more than resources/approach
 - Have pre-conceived notions about the “right” approach
 - Are not open to new ideas

How Many Evaluators Should You Have?

3-5-7

Be Cautious With Executives

- Can “sway” the rest of the committee
- Typically very busy = can put timeline in jeopardy



Be Cautious With Tech Experts

- Can “sway” the rest of the committee

Solicitations Contents



1

Scope of Work

2

Evaluation Procedures

3

Proposal Instructions

What & How to Submit

4

Administrative Requirements

5

Submittal Forms & Attachments

Proposal Topics

1. General Formatting
2. Submission Requirements & Procedures
3. Proposal Contents

Submission Options



Hardcopy



Electronic

Solicitations Contents



1

Scope of Work

2

Evaluation Procedures

3

Proposal Instructions

4

Administrative Requirements

“Rules” of the RFP

5

Submittal Forms & Attachments

Administrative Topics

1. Point of Contact
2. Schedule
3. Pre-Proposal Meeting
4. Q&A



Procurement

schedule

*“How Much Time
Should We Give
Them?”*

Suggestions

- Small or simple project/scope
- No subcontractors or subconsultants
- Easy proposal response (1-5 documents)

Suggestions

- Small or simple project/scope
- No subcontractors or subconsultants
- Easy proposal response (1-5 documents)

**4-6
Weeks**

Suggestions

- Small or simple project/scope
- No subcontractors or subconsultants
- Easy proposal response (1-5 documents)

4-6
Weeks

- Large or complex project/scope
- Requires subcontractors or subconsultants
- More complex proposal response (5+ documents)

Suggestions


- Small or simple project/scope
- No subcontractors or subconsultants
- Easy proposal response (1-5 documents)

**4-6
Weeks**

- Large or complex project/scope
- Requires subcontractors or subconsultants
- More complex proposal response (5+ documents)

**6-8
Weeks**

Solicitations Contents

RFP Request For Proposals	1	Scope of Work	
	2	Evaluation Procedures	
	3	Proposal Instructions	
	4	Administrative Requirements	
Project Name Date Issued	5	Submittal Forms & Attachments	Consistent Format

Goal & Objectives

- Frustrate vendors
- Difficult to determine what to submit
- Increase the odds of missing something
- Increase the time vendors have to spend



Don't Mix Scope With Proposal Instructions

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.

Campbell Reservoir #2 is critical facility for the City system and power generation needs of the City. In its current configuration, the first Los Angeles Aqueduct (CITY1) flows as an open channel into Campbell Reservoir #2 through a concrete inlet structure built at grade. Campbell Reservoir #2 includes a bottom drain outlet that exits to the Marie Tunnel and travels to the CITYFP. The second Aqueduct (CITY2) currently consists of a buried 87-inch diameter pipeline, which connects directly downstream of Campbell Reservoir #2 outlet. Water exits Campbell Reservoir #2 into an outlet pipeline that connects to Marie Tunnel. CITY2 bypasses Campbell Reservoir #2 and connects directly to the outlet pipeline downstream of the reservoir. The outlet pipeline carries the combined flows of CITY1 and CITY2 to Marie Tunnel.

Example

- In your proposal submittal, identify the legal name of your company, the number of years in business, a point of contact that can be contacted for clarification of this proposal (which must include their name, title, email address and phone number), the name of the critical individuals that will be assigned to this contract (including the Project Manager, the Functional Lead, and the Technical Lead). The proposer must also acknowledge receipt of all addenda (the proposer must identify each addenda by number and confirm that each one has been incorporated into the proposal). The proposal must be signed by the person authorized to contractually obligate the proposer, which includes the printed name of the person, title, phone, email, signature and date signed.

Example

- In your proposal submittal, identify the legal name of your company, the number of years in business, a point of contact that can be contacted for clarification of this proposal (which must include their name, title, email address and phone number), the name of the critical individuals that will be assigned to this contract (including the Project Manager, the Functional Lead, and the Technical Lead). The proposer must also acknowledge receipt of all addenda (the proposer must identify each addenda by number and confirm that each one has been incorporated into the proposal). The proposal must be signed by the person authorized to contractually obligate the proposer, which includes the printed name of the person, title, phone, email, signature and date signed.

VS

SUBMITTAL FORM A
Proposer Information

Proposer Information
Proposer Legal Name: _____
Number of Years in Business: _____

Contact Information
Individual that can be contacted for clarification on this proposal:

Name _____
Title _____
Email _____
Telephone _____

Critical Team Member Information
Identify the critical team members listed below. Include name and title. You may list the same individual for multiple roles if they will be performing those roles. If you are not proposing HR services, you can leave this section blank.

Project Manager (Individual) _____
Functional Lead (Individual) _____
Technical Lead (Individual) _____

Addenda Acknowledgement
The Proposer acknowledges receipt of the following addenda, and has incorporated the requirements of such addenda into their proposal. Failure to identify and sign for all addendum may subject the Proposer to disqualification. The Proposer must list all addenda (by number), then initial and date to confirm that you have received and incorporated them into your Proposal.

Number	Initial & Date	Number	Initial & Date	Number	Initial & Date

Signature
This proposal must be signed by the person authorized to contractually obligate the Proposer.

Printed Name _____
Title _____
Phone _____
Email _____
Signature _____
Date Signed _____

All Criteria Must Be Transformed into a Submittal Form Template!

SUBMITTAL FORM A Proposer Information

PROJECT INFORMATION
RFP Number: _____
Project Name: _____

PROPOSER INFORMATION
Company Name: _____
Contact Information (Individual that can be contacted for clarification on this proposal package)
Name: _____
Title: _____
Email: _____
Telephone: _____

TAX REGISTRATION CERTIFICATE OR VENDOR REGISTRATION NUMBER
Each Proposer must provide the Controller's Office with a registration account number issued by the Los Angeles Office of Finance, prior to being paid for any goods or services provided. Persons engaged in any business or occupation within the City of Los Angeles are required to register and pay the required tax. Businesses, including Proposers, subject to this tax are issued a Business Tax Registration Certificate (BTRC) or a Vendor Registration Number (VRN). A BTRC application package is provided in the exhibit of this RFP. Additional information regarding this requirement may be obtained at Office of Finance, Tax & Permit Division, 200 North Spring Street, Room 101, Los Angeles, CA 90012, Phone: (844)663-4411, or on the web at: <http://www.lacity.org/finance/>. Please provide your Tax Registration Certificate (TRC) and/or your Vendor Registration Number (VRN) below:
Tax Registration Certificate (TRC): _____
Vendor Registration Number (VRN): _____

TAXPAYER IDENTIFICATION NUMBER (TIN)
The Internal Revenue Service (IRS) requires that all service providers and goods and materials suppliers furnish a Taxpayer Identification Number (TIN) to the party that pays them. After the proposal's due date and upon request by Supply Chain Services, the "Request for Taxpayer Identification Number and Certification (Form W-9)" SHALL be emailed to the Utility Buyer within 5 business days. Any change in Form W-9 information, including legal name or address of the Proposer, will require a submittal of a new Form W-9. Please provide your Taxpayer Identification Number (TIN) below:
Taxpayer Identification Number (TIN): _____

CONTRACTOR LICENSE
Please provide your California Contractor License below:
Contractor License: _____

SUBMITTAL FORM I Past Performance Questionnaire

LADWP has requested past performance information on vendors. The vendor listed below has identified you as a client for which they have previously performed work for. We would appreciate you taking the time to complete this survey.

PART A – VENDOR NAME
Name of the DB Firm: _____

PART B – PROJECT BACKGROUND
Client Name: _____
Project Name: _____
Location (City/State): _____
Date Completed: _____
Project Size (\$): _____

PART C – REFERENCE EVALUATION
Please rate your overall level of satisfaction on a scale of 1 to 10 (with 10 representing that you were very satisfied and 1 representing that you were very unsatisfied).

CRITERIA	UNIT	RATING
Ability to manage costs	(1-10)	
Ability to manage schedule	(1-10)	
Ability to meet quality expectations	(1-10)	
Overall customer satisfaction	(1-10)	

Please provide any additional comments (consider: anything you would do differently, the greatest risk/problems/challenges that were encountered, accomplishments, etc.):

Printed Name of Evaluator: _____ Title: _____ Phone Number: _____ Signature: _____

Thank you for your time and effort in assisting us in this important endeavor.
Please return the completed survey to: << The Vendor should enter a valid fax or email here >>

SUBMITTAL FORM E Approach & Methodology

SPECIAL REQUIREMENTS: This Submittal Form must NOT contain any names that can be used to identify the Proposer, must NOT identify the cost/fee, and must NOT exceed the maximum page limit (see RFP Sections 4.6).

SECTION 4 EVALUATION PROCEDURES

4.1 EVALUATION SUMMARY

Proposals will be evaluated based on their overall value to the Owner, factors (as outlined in this Section).

4.2 CRITERIA AND WEIGHTS

Proposals that are found to be responsive, will be evaluated and assessed against the criteria below.

Criteria
Cost
Interview of Key Personnel ¹
Project Approach
Narrative Proposal Items << Items from 4.8 & 4.9>>
Potential Value of Warranty
Overall Project Duration
Past Performance Qualification (Contractor)
Past Performance Qualification (Manufacturer)
Total

¹ If the Owner shortlists Offerors, only the shortlisted Offerors will be evaluated.

SECTION 5 ADMINISTRATIVE REQUIREMENTS

5.1 OVERVIEW

The <<Organization Name>> (referred to as the "Owner" hereinafter) is issuing this Request For Proposal (RFP) to solicit proposals from Roofing Contractors (referred to as "Offerors"), to << briefly describe the scope of service >> <<Try to describe at a very high-level and avoid any technical language or specifics, which will be described in this RFP. For example, to roof/re-roof approximately 50,000 sf.>>. Proposals shall be submitted in accordance with the requirements set in this document.

5.2 BUYER

The individual listed below (referred to as "Buyer" herein) is responsible for the conduct of this procurement. All questions, inquiries, concerns, or clarifications regarding this solicitation must be submitted electronically (email) to this individual. Offerors shall not contact or communicate with any other Owner employee. Unauthorized contact about this RFP with any other Owner employees may result in immediate disqualification.

Contact Name: <<Insert Name>>
 Title: <<Insert Title>>
 Organization Name: <<Insert Name>>
 Address: <<Insert Address >>
 E-Mail: <<Insert Email>>

5.3 PROCUREMENT SCHEDULE

The Owner will make every effort to adhere to the schedule below. However, the Owner reserves the right, at its sole discretion, to adjust the RFP Schedule of Events as it deems necessary.

No	Activity	Time	Date
1	RFP Issued		xx/xx/xx
2	Pre-Proposal Meeting	9:00 am CST	xx/xx/xx
3	Site Visit	11:00 am CST	xx/xx/xx
4	Deadline for Questions	2:00 pm CST	xx/xx/xx
5	Deadline for Proposal Submission (Proposal Due Date)	2:00 pm CST	xx/xx/xx
6	Shortlisting		xx/xx/xx

SUBMITTAL FORM A – OFFEROR BACKGROUND

PROJECT INFORMATION

RFP Number: _____
 Project Name: _____

OFFEROR INFORMATION

Name of Company: _____
 Web URL: _____
 Address: _____

Number of Years in Business (Under Current Business Name): _____
 Provide your License Number (in the jurisdiction for this project): _____

CONTACT INFORMATION

Identify an individual that can be contacted for clarification on this proposal

Name: _____
 Title: _____
 Email: _____
 Telephone: _____

ADDENDA ACKNOWLEDGEMENT

The Offeror acknowledges receipt of the following addenda and has incorporated the requirements of such addenda into their proposal. Failure to identify and sign for all addendum may subject the Offeror to disqualification. The Offeror must list all addenda's (by number), then initial and date to confirm that you have received and incorporated them into your Proposal. *The Offeror may add more rows as necessary.*

Number	Initials & Date	Number	Initials & Date	Number	Initials & Date

FINANCIAL INFORMATION

What is the Offerors average annual revenue from work completed in the last three (3) years?

Year	Revenue
	\$
	\$
	\$

Want today's Presentation?

White papers?
Toolkits?
Templates?

<https://center4procurement.org/cappo/>



Free Webinar Series

3rd Thursdays every month

@ 12pm Central

15-min Teaching Moment

(learn a new tip, trick, or tool)

30-min Virtual Peer Group

(network with professionals)

Office Hours

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



Previous Recordings Available Online!

Handling Large IT Hardware Buys With Different Scope Packages

October 21, 2021



Vendor of Record Programs

November 18, 2021



7 Most Deadly Marketing Phrases

December 16, 2021



It's a New Year - Ready for the Next Level?

January 20, 2022



Best Practices for Evaluator Training

February 17, 2022



Got RFP Soft Skills?

March 17, 2022



Best Practices for Evaluator Training

February 17, 2022



Got RFP Soft Skills?

March 17, 2022



IT Software Demonstrations

June 16, 2022



Amazing Pre-Proposal Meetings

July 21, 2022



Responding to Vendor RFIs

August 18, 2022



Human Dimensions of Procurement Professionals

September, 15 2022



center4procurement.org

Additional 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