

# Welcome & Introductions!

## RFP Training Workshop



# Today's Agenda

- 9:00am – 9:15am Welcome & Introduction: Why are We Here?
- 9:15pm – 10:30am Foundations of Procurement Excellence
- **10:30am – 10:45am Break**
- 10:45am – 11:30am WORKSHOP: Solicitations and RFP Best Practices
- 11:30am – 12:00pm Evaluation Best Practices and Considerations
- **12:00pm – 12:30pm Lunch Break**
- 12:30pm – 1:45pm WORKSHOP: Developing an Effective Statement of Work
- **1:45pm – 2:00pm Break**
- 2:00pm – 3:00pm Becoming a Client of Choice

# Introductions



# Center for Procurement Excellence (CPE)



# 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**

# Advocacy

**Introduce legislation to enhance the openness, fairness, and transparency of the competitive sealed proposals method.**

**Provide agencies with a more streamlined, clearer structure to be used in their administration of RFPs.**

## Who thinks RFPs can be better

2

Yes

Nope

## Who thinks RFPs can be better

2

Yes

50%

Nope

50%

## Who thinks RFPs can be better

2

Yes

50%

Nope

50%



Have you ever attended one of CPE's RFP Doctor session?

 2

Yes

No

Wait, what is this??

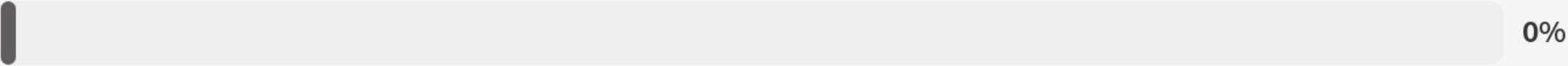
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2

Yes



No



Wait, what is this??





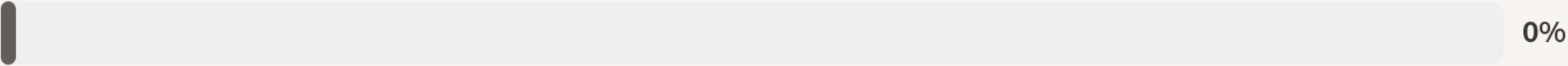
# Have you ever attended one of CPE's RFP Doctor session?

2

Yes



No



Wait, what is this??



Did you see us at CAPPO Annual Conference in January earlier this year?

✓ 1

Yes!

Nope

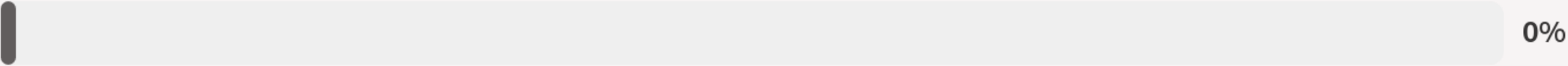
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Nope



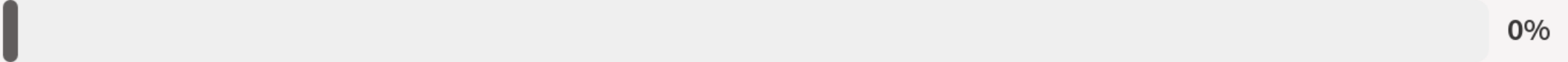
Did you see us at CAPPO Annual Conference in January earlier this year?

✓ 1

Yes!



Nope



Have you ever been to a CPE "Better RFPs" course before?

✓ 2

Yes!

No :-(

## Have you ever been to a CPE "Better RFPs" course before?

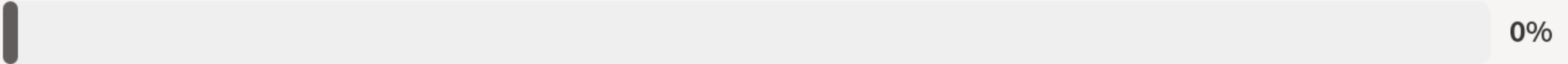
2

Yes!



100%

No :-(



0%

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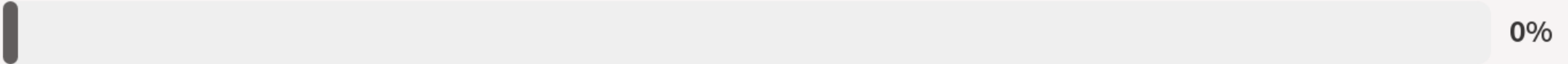
2

Yes!



100%

No :-(



0%

## What type of organization do you represent?

1

Federal

State

City

County

Utility

School / K-12 / Higher Ed

Special District

Private Company

Other



# What type of organization do you represent?

1



SEE MORE

# What type of organization do you represent?

1



SEE MORE

## Do you have an eProcurement System?

 0

Yes

Not yet, but soon.

Nope

# Do you have an eProcurement System?

0

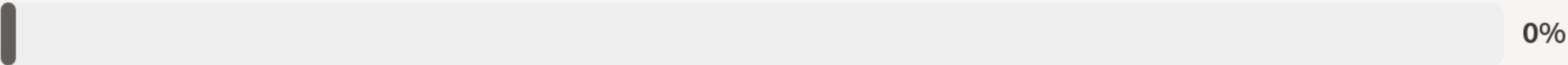
Yes



Not yet, but soon.



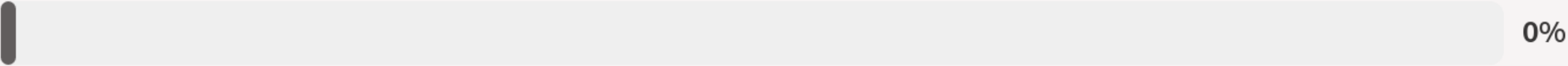
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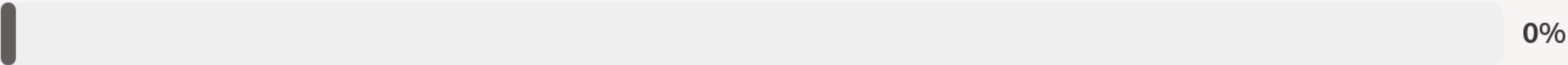
Yes



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Nope



## What attracted you to this course?

✓ 1

Someone referred me

Boss made me

I need the CEUs

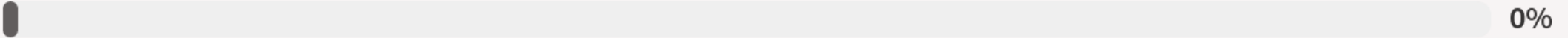
I am tired of average

I can't remember

## What attracted you to this course?

✓ 1

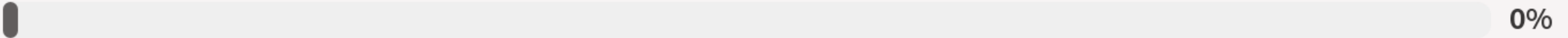
Someone referred me



Boss made me



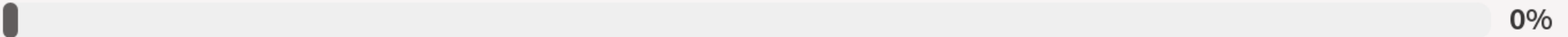
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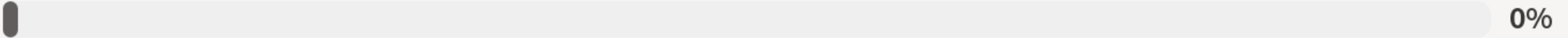
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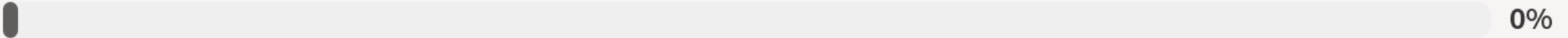
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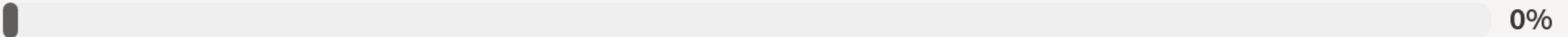
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I am tired of average



I can't remember





## Is it getting harder to get good vendors

 0

Yes

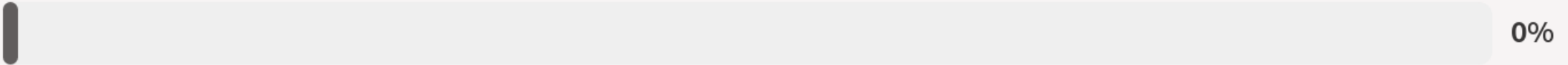
A little bit

No

## Is it getting harder to get good vendors

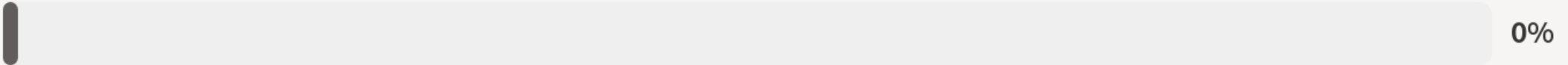
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Yes



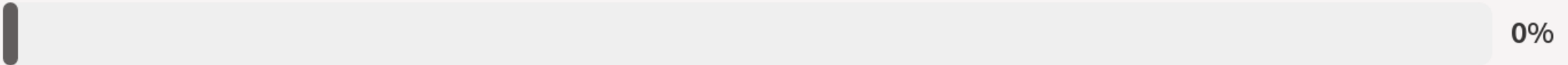
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A little bit



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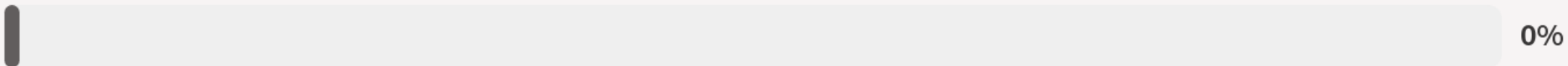


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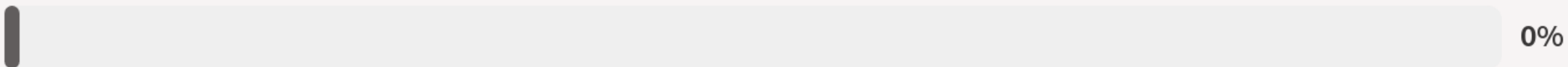
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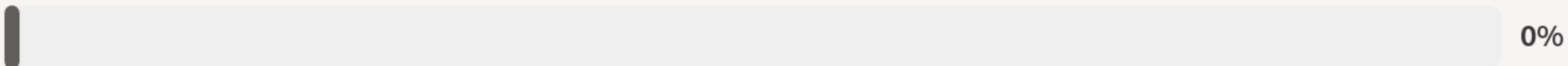
Yes



A little bit



No



## How easy is it to complete your organizations RFP process

1

Harder than Ever

Hard as usual

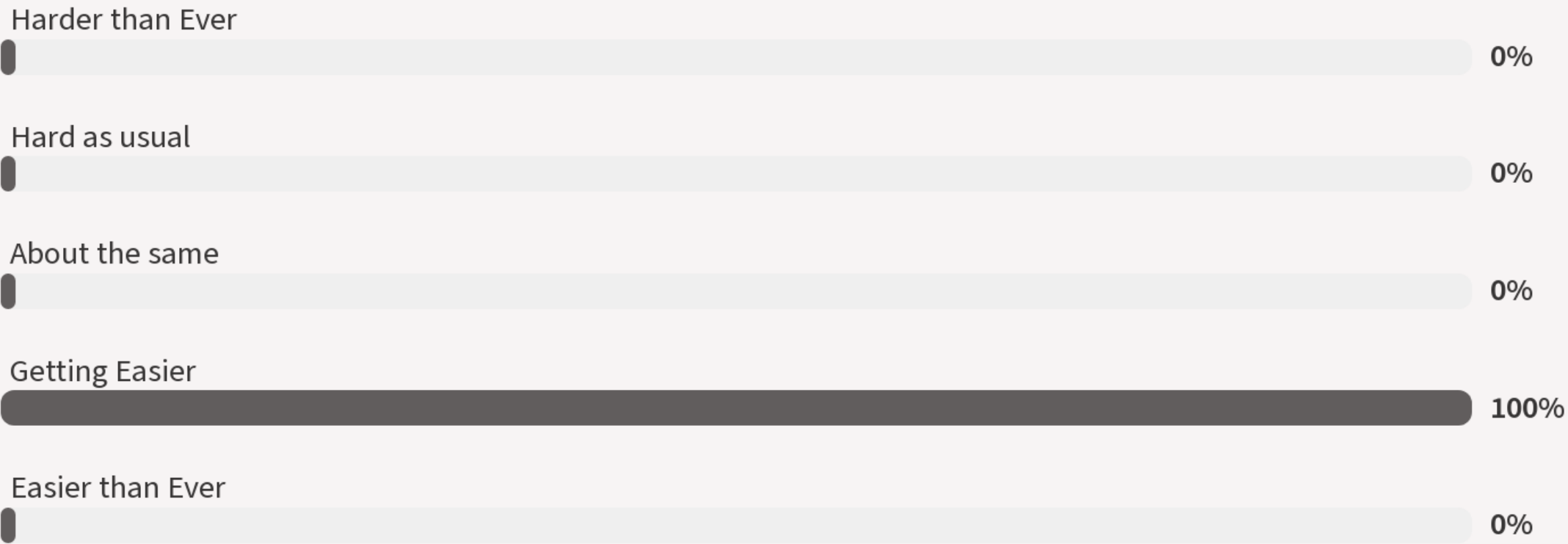
About the same

Getting Easier

Easier than Ever

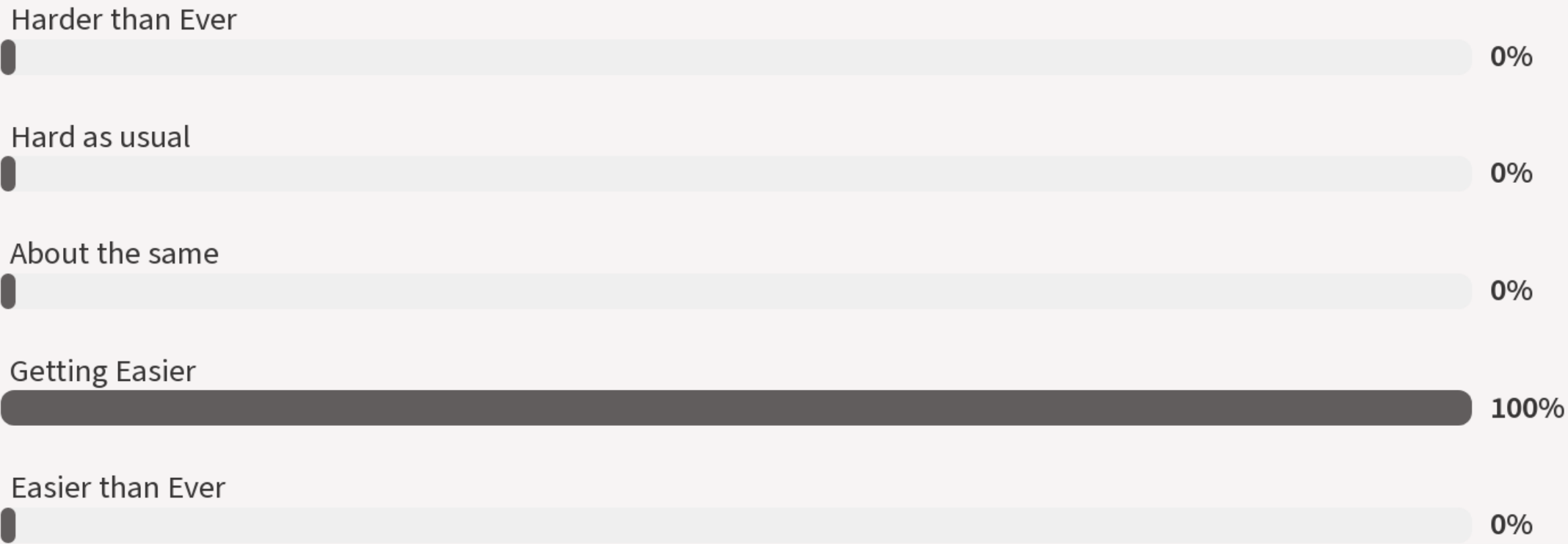
# How easy is it to complete your organizations RFP process

1



# How easy is it to complete your organizations RFP process

1



# The Procurement Package

- CPE is developing a package to help procurement professionals and organizations to provide training videos for RFP implementation, templates and RFP tools, checklists, and video training on template and tools use. They include:
  - ❑ **SOW Template** – SOW Fundamentals, Current Conditions, SOW Development
  - ❑ **RFP Template** - RFP Structure, Developing Eval. Criteria and Weights
  - ❑ **Schedule Builder Toolkit** - Schedule Importance/Use and How to Use the Tools
  - ❑ **Evaluation Guide Template** – Selecting Evaluators and Preparing Evaluation Guide
  - ❑ **Pre-proposal Meetings** – How to Prepare for the meeting, Developing a pre-proposal presentation
  - ❑ **Scoring Matrix Template** – Working in Excel, Creating a Scoring Matix, Techniques in Analyzing Data
  - ❑ **Conducting Presentations, Interviews and Product Demonstrations**
  - ❑ **Debriefing Template** – Preparing Debrief Documents and Debriefing Meetings

Would you or your organization be interested in a package like this?

✓ 1

Super interested

Yes

Might be

Not sure

Not interested



## Would you or your organization be interested in a package like this?

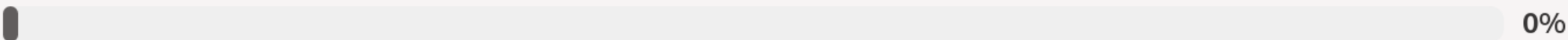
1

Super interested



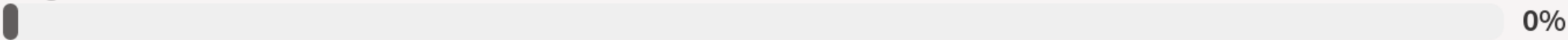
100%

Yes



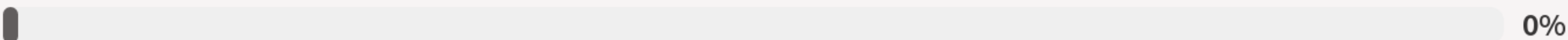
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Might be



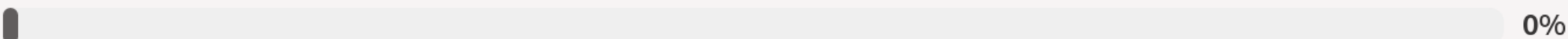
0%

Not sure



0%

Not interested



0%

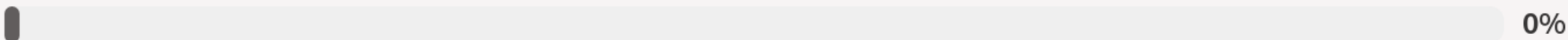
## Would you or your organization be interested in a package like this?

✓ 1

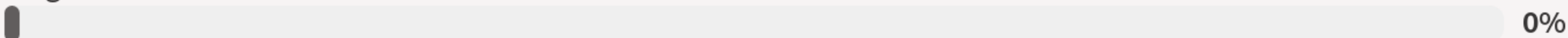
Super interested



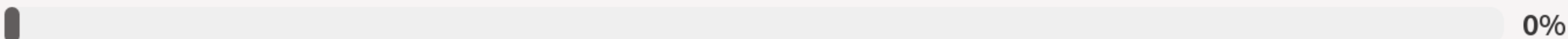
Yes



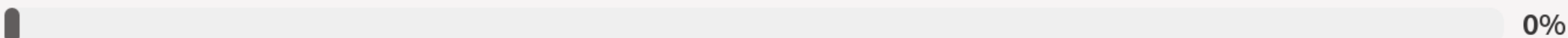
Might be



Not sure



Not interested



What if we could keep the base option for a cost of less than \$5,000 (and you keep it forever)?



Even more interested

Still interested

This is fake - you can't just give it to me!

What if we could keep the base option for a cost of less than \$5,000 (and you keep it forever)?



Even more interested

0%

Still interested

100%

This is fake - you can't just give it to me!

0%

What if we could keep the base option for a cost of less than \$5,000 (and you keep it forever)?



Even more interested

0%

Still interested

100%

This is fake - you can't just give it to me!

0%

# Procurement Hotline

We are also thinking about a Hot Line to handle all of your RFP questions and to provide reviews of your solicitation docs

- SOW Review and Scorecard
- RFP Review and Scorecard
- Scoring Matrix Review
- Final Scoring and Award Data Review
- Etc.

## Is a Procurement Hot Line and/or a Document Review Service of Interest to you?

1

Super interested

Yes

Might be

Not sure

No way - would never use it

# Is a Procurement Hot Line and/or a Document Review Service of Interest to you?

1





# Is a Procurement Hot Line and/or a Document Review Service of Interest to you?

1



Do you think access to a hotline via a subscription service like this would make your work life easier?

✓ 1

Oh yes. So much eaiser!

It could... not sure though.

Nope. I don't have that many problems.

Do you think access to a hotline via a subscription service like this would make your work life easier?

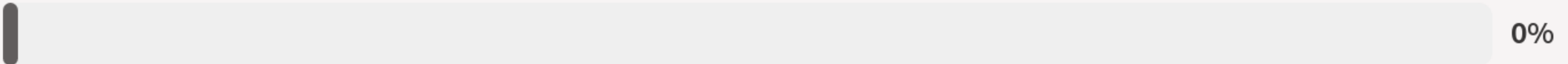
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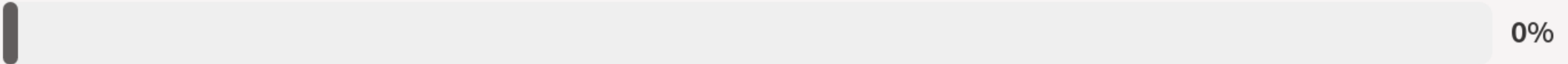
100%

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0%

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0%

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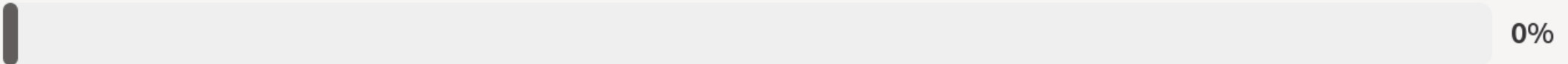
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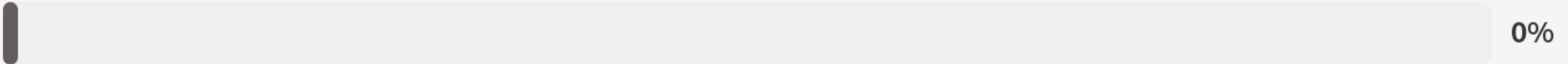
100%

It could... not sure though.



0%

Nope. I don't have that many problems.



0%

Is this something that your organization could afford if it was a monthly Subscription around \$500 / month?

 0

Yes. That seems fair.

It's a little high.

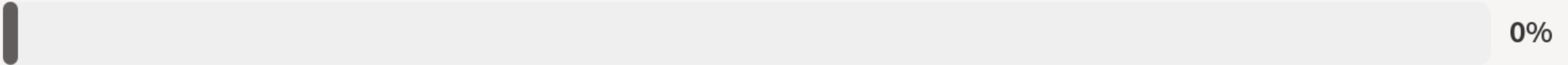
Wow, that's a super value!

Nope. Not affordable.

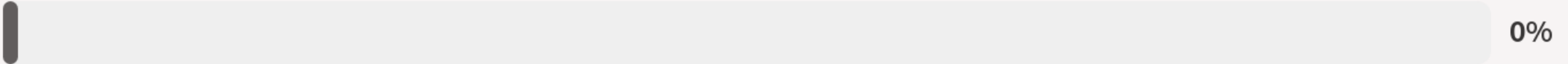
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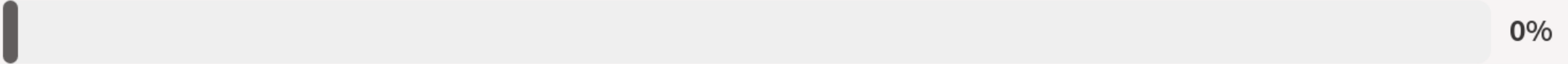
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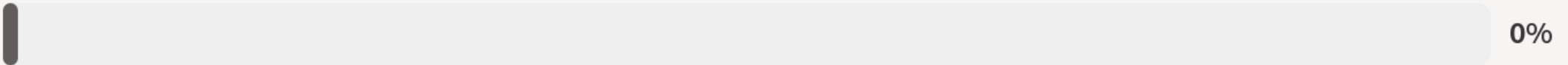
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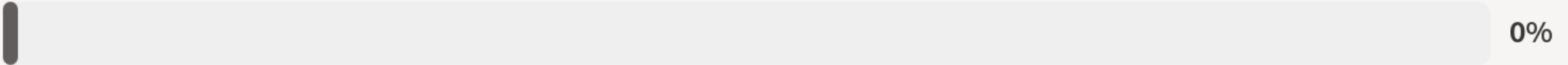
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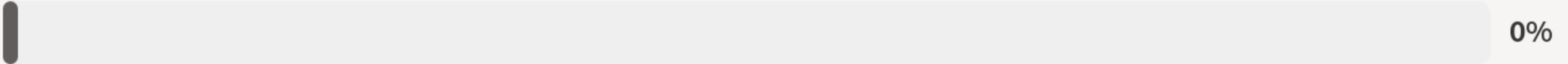
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0

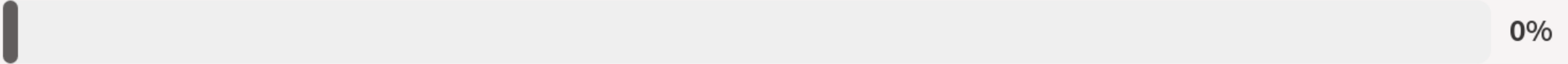
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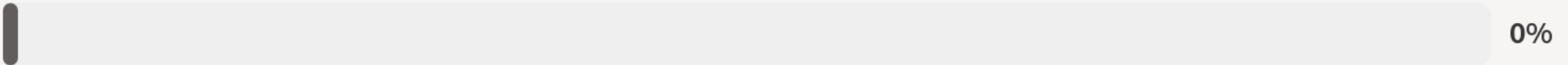
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Wow, that's a super value!



Nope. Not affordable.



Do your procurement rules allow you to purchase subscriptions without a formal solicitation / competition?

 0

No. We have to do a formal solicitation.

Yes. We could buy a subscription service direct.

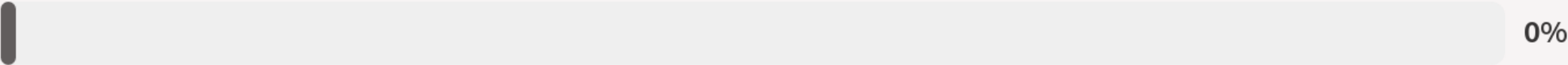
Not sure



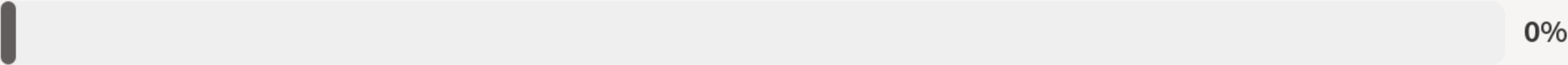
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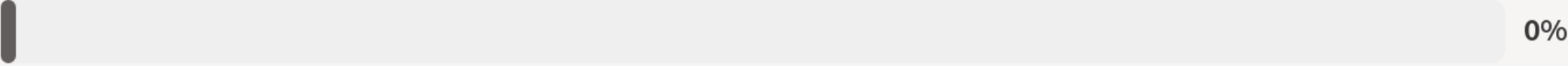
(A) No. We have to do a formal solicitation.



(B) Yes. We could buy a subscription service direct.



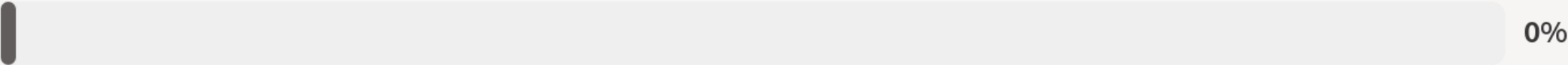
(C) Not sure



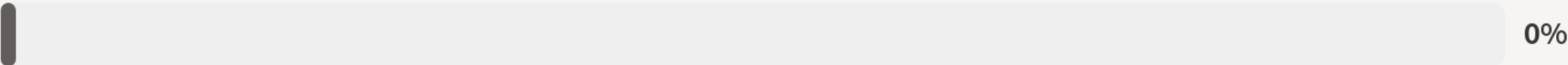
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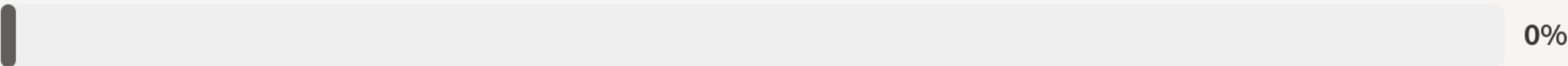
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Not sure



# **NOTICE**

**All Data is as of June 7, 2023**

**The Supply Chain is Changing RAPIDLY**

**The Data Should be Updated REGULARLY**

# NOTICE

**Data Focuses on AEC & IT**  
**because these approximate**  
**nearly all services we procure**

**AEC** = design & professional services, scientific studies, construction, commodities, FM, O&M

**IT** = consulting services, software, hardware, data & analytics, implementation, support

# **Many Headwinds in Today's Supply Chain**

- **Cost Escalation & Volatility**
- **Materials Shortages & Supply Chain Challenges**
- **Economic Activity (workload)**
- **Workforce**

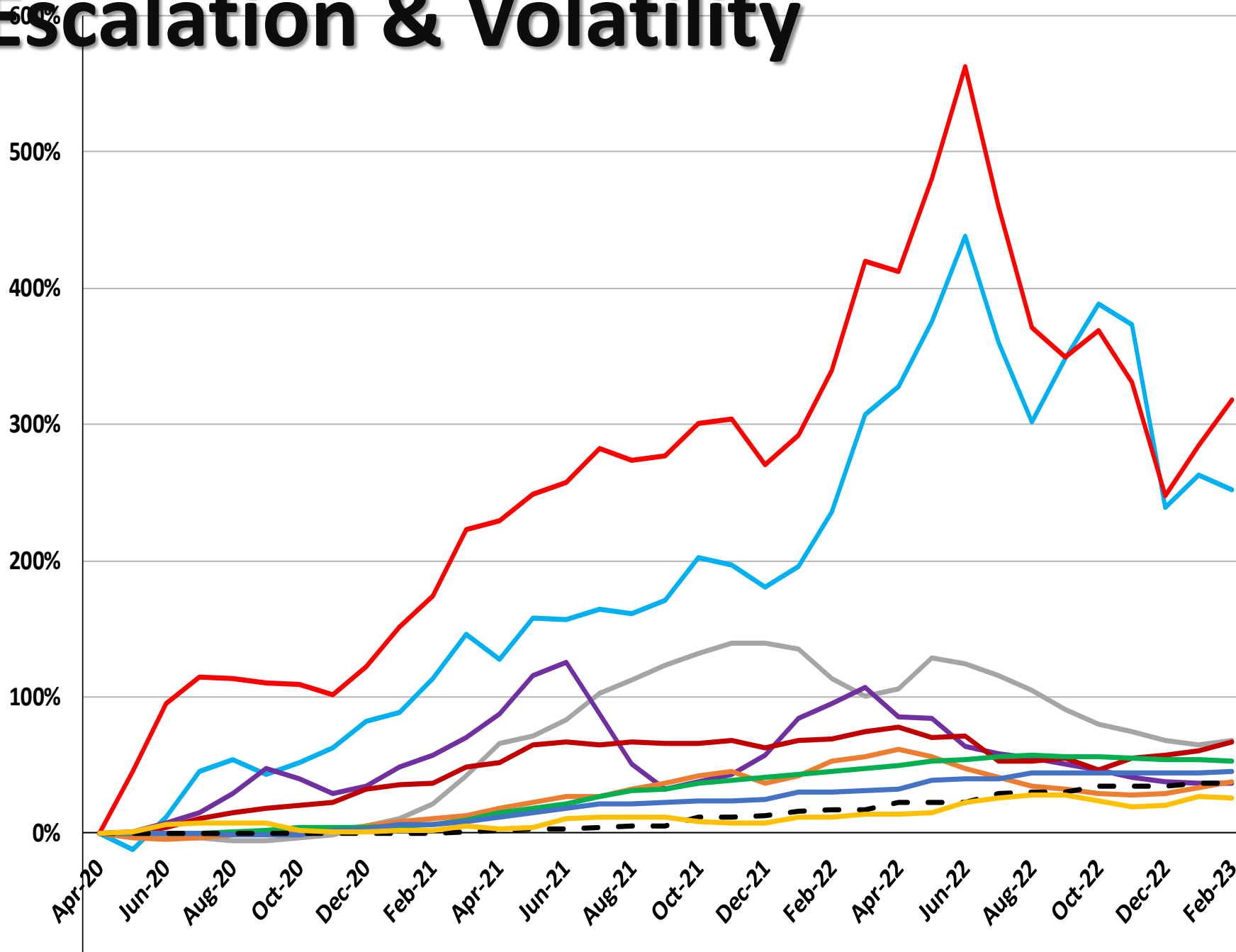
# Many Headwinds in Today's Supply Chain

- **Cost Escalation & Volatility**
- Materials Shortages & Supply Chain Challenges
- Economic Activity (workload)
- Workforce

# Escalation & Volatility

## PPIs for Selected Inputs

% change  
from Apr 2020  
to Feb 2023:



Gasoline 318%

Diesel Fuel 252%

Steel Mill Products 69%

Copper & Brass Mill Shapes 67%

Plastic Construction Products 53%

Gypsum products 45%

Aluminum Mill Shapes 38%

Bid Price ----- 37%

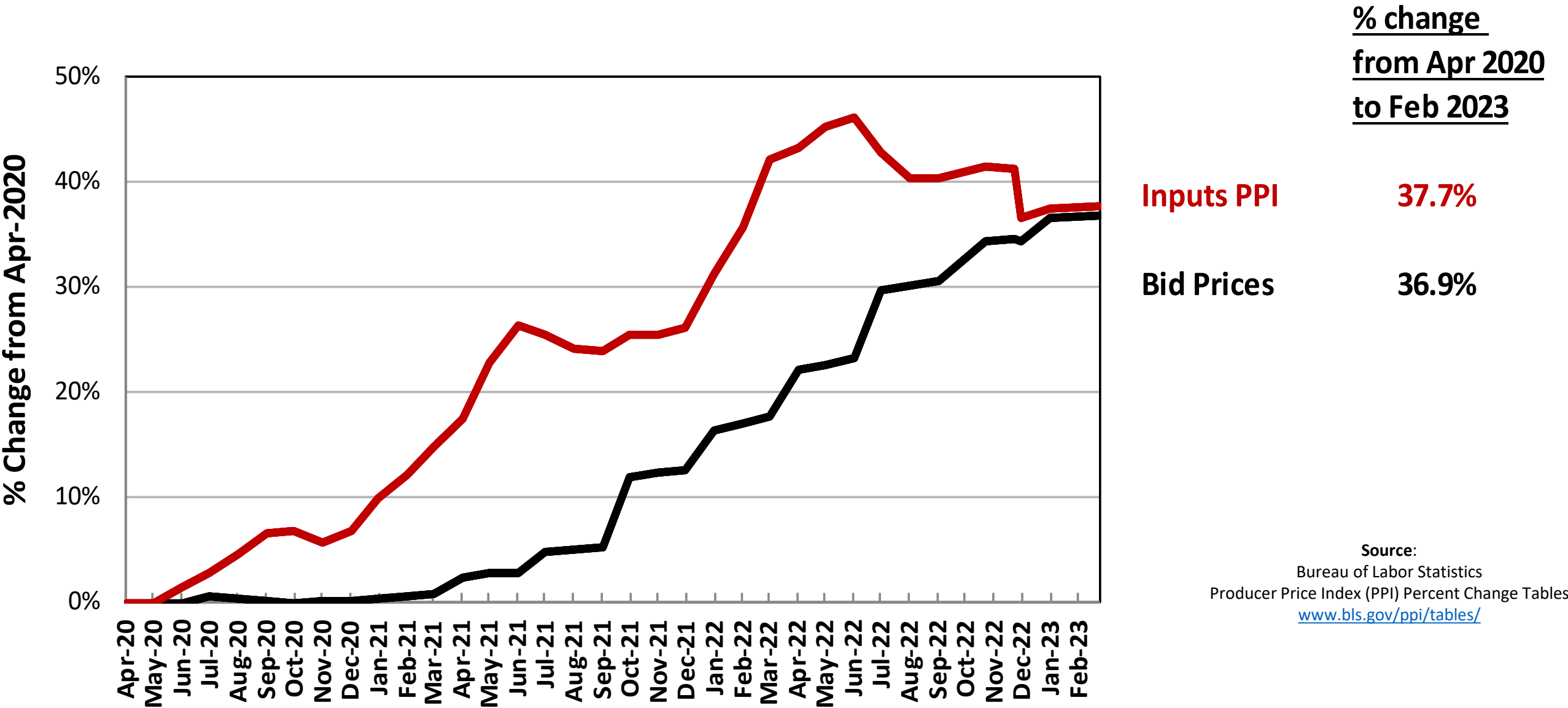
Lumber and Plywood 36%

Electric Power 26%

Source:  
Bureau of Labor Statistics  
PPI Percent Change Tables  
[www.bls.gov/ppi/tables/](http://www.bls.gov/ppi/tables/)



# Input Prices vs. Bid Prices for New Nonresidential Construction





# Skanska predicts construction costs will rise above inflation in many US cities

Published March 14, 2023

- Even though the cost of commercial building has hit record highs recently, owners and contractors can expect to shell out even more for construction projects in many U.S. cities in the near future, according to a new report from Skanska that looked at 21 major markets.

# Incoming!

- The bid-price index only indicates the price contractors propose for new starts.
- On projects for which they had already submitted a bid or begun work, **contractors were stuck with paying elevated materials prices that they could not pass on.**

**WARNING**

**Do Not Get “Down”**

**I am VERY Optimistic for the Future**

**(but we may have to go through a rough patch first)**

# Many Headwinds in Today's Supply Chain

- Cost Escalation & Volatility

- **Materials Shortages & Supply Chain Challenges**

- Economic Activity (workload)

- Workforce

# Supply Chain Issues

- 90% of projects have had supply chain impacts
- 84% of projects have had higher cost
- 72% of projects have taken longer
- **Actions People are Taking:**
  - Accelerated purchasing after contract award (cash flow)
  - Alternative suppliers
  - Alternative materials/products (change the spec)
  - Stocking inventory
  - Increasing Bids/Budgets
  - Longer Completion Times
  - Some Primes advising Owners to push Risk to Subs

**Supply Chain Disruptions can strain Client/Vendor Relations**

**More vendors are publishing  
their economic outlooks  
to “Educate” their clients  
on current market realities**

# Vendor Dashboards

- Mortenson – Nov/Dec 2022



## CURRENT MATERIAL AND EQUIPMENT LEAD TIMES

### ARCHITECTURAL MATERIALS

- Structural steel **40+ weeks**
- Hollow metal frames **10+ weeks**
- Roof insulation **24+ weeks**
- Wood doors **20+ weeks**

### MECHANICAL & ELECTRICAL EQUIPMENT

- Custom air handling units **50+ weeks**
- Heat exchangers **34+ weeks**
- Generators (over 125kW) **52+ weeks**
- Networking equipment **57+ weeks**

## Construction Material Supply Chain Projections

"Supply chain is a commodity-by-commodity discussion," says Clark. "A lot of materials have stabilized in terms of pricing, but we anticipate seeing continued upward pressure on some material prices because demand is still strong. However, as kinks in the supply chain begin working themselves out, it will help tap some of those prices down a bit. **As prices stabilize, we expect year-to-year inflation to settle closer to historical norms of 3-5% per year—in 2023 we should plan for around 6%.**

The past few years of the supply chain in the construction industry have shown us that nothing is guaranteed. A single event can further disrupt an already volatile construction material supply chain.

However, we as an industry can make predictions based on patterns and trends over the past year related to [construction material costs](#), availability, and lead times.



## 2023 CONSTRUCTION MATERIAL SUPPLY CHAIN PROJECTIONS

**6**

**PERCENT**

Anticipated 2023  
inflation rate

**80**

**WEEKS**

Lead time for 2MW  
generators



**SHORTAGE**

- Copper
- Mechanical Products
- Electrical Products



**STABILIZE**

- Aluminum
- Semiconductors
- Lumber
- Roofing Materials

# Many Headwinds in Today's Supply Chain

- Cost Escalation & Volatility
- Materials Shortages & Supply Chain Challenges
- **Economic Activity (workload)**
- Workforce



# Activity – More Work Coming?

## Dodge Momentum Index (Feb 2023 update)

Source: <https://www.construction.com/news/>

- Monthly measure of nonresidential projects in planning, leading indicator of construction by 1-year
- “The continued elevation in the DMI should provide hope that construction activity will grow in 2024”

### DODGE MOMENTUM INDEX

(2000=100, Seasonally Adjusted)



# Activity – More Work Coming

## **New + baseline construction-related funding included in the Senate infrastructure bill**



Total: \$1.2 trillion, incl. \$304B (billion) to reauthorize FAST Act (\$69B increase over 5 years)

- \$351B (billion): roads, bridges (including FAST Act reauthorization)
- \$107B: transit
- \$102B: passenger and freight rail
- \$60B: water infrastructure
- \$45B: broadband
- \$20B: airports
- \$39B: public transit
- \$25B: airports
- \$17B: ports and waterways
- \$17B: power and grid
- \$7.5B: electric vehicle infrastructure

## Others:

- **De-Carbonization & Energy Policies for Existing Buildings?**
- **On-Shoring**
- **Semi/Chip and Data Centers**

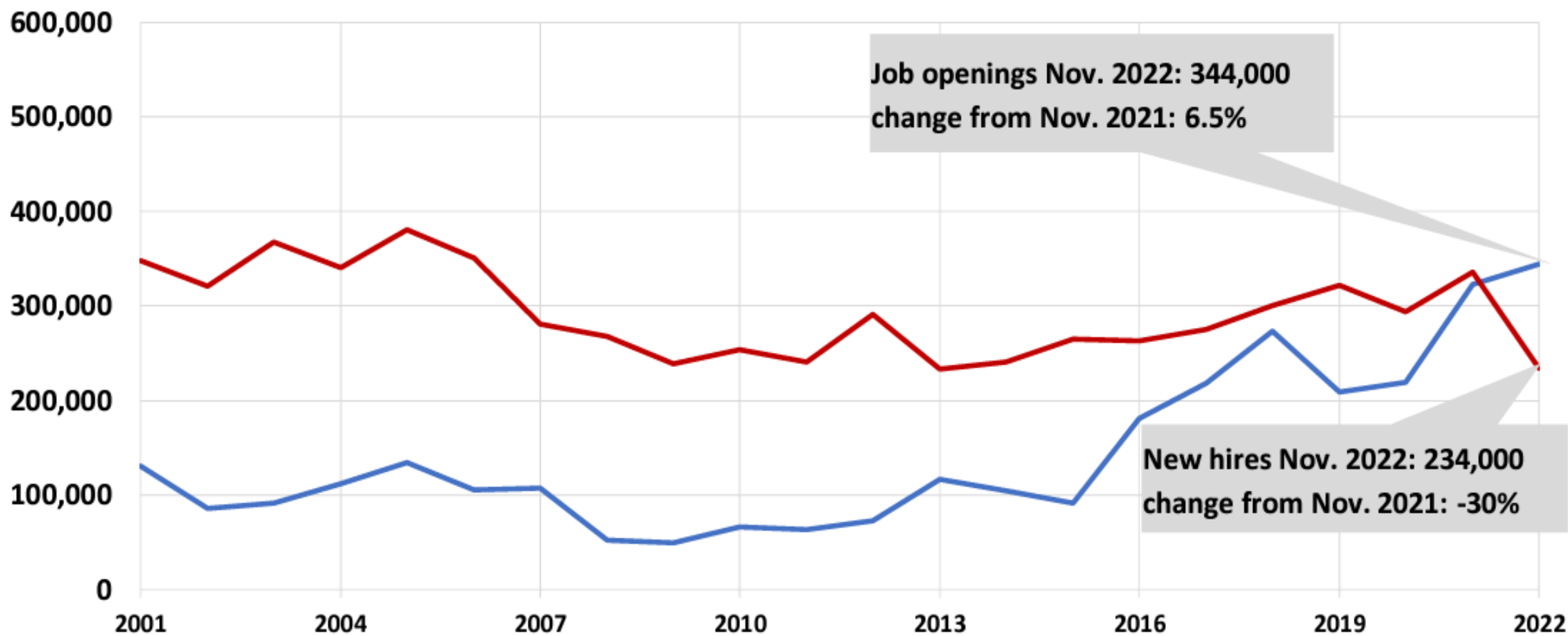
# Many Headwinds in Today's Supply Chain

- Cost Escalation & Volatility
- Materials Shortages & Supply Chain Challenges
- Economic Activity (workload)
- **Workforce**

# Construction job openings & new hires



Job openings and hires, Nov. 2001-Nov. 2022, not seasonally adjusted

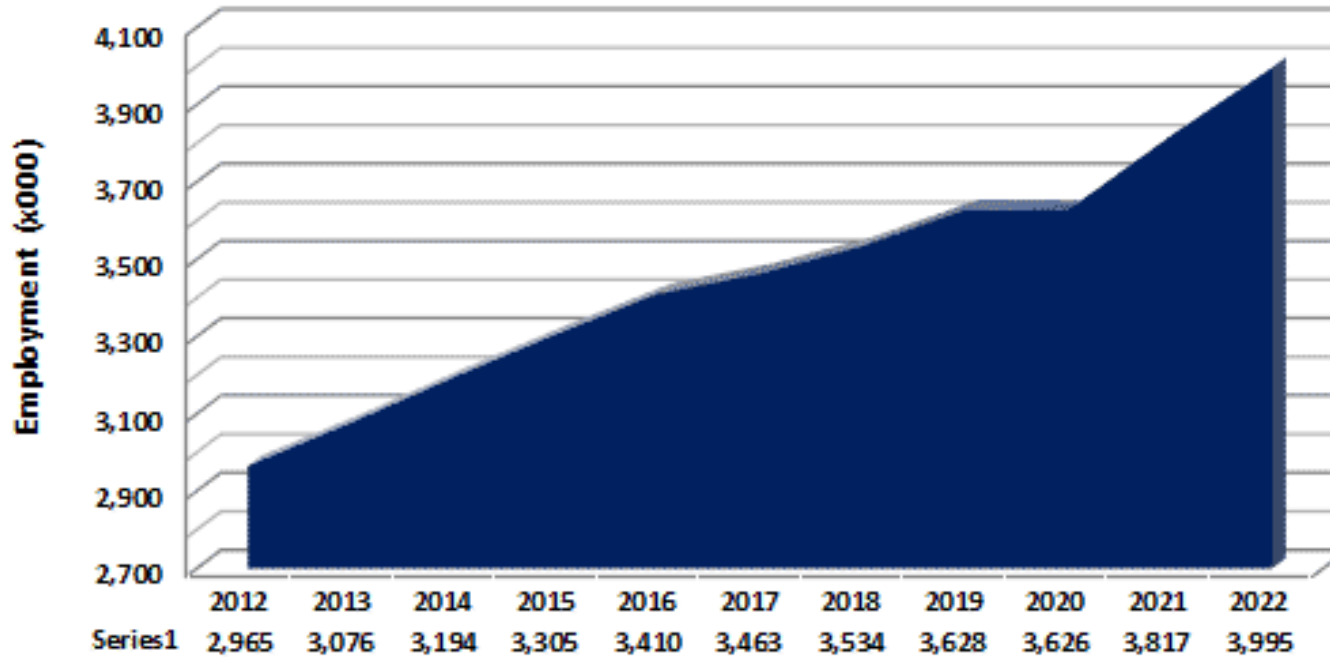


# Job Openings in Construction

- There is strong evidence that the construction industry would have added many more workers ***if workers had been available.***
- Job openings in construction at the end of May totaled 466,000 (not seasonally adjusted), a jump of 130,000 or 39% from a year earlier and by far the largest May total in the 22-year history of the data, as shown in Figure 3.
- Job openings exceeded the 437,000 workers hired in May, implying that **construction firms would have hired twice as many workers that month as they were able to, if there had been enough qualified applicants.**
- It is likely that **contractors will pay more overtime** to make up for the workers they don't have

# Workforce Growth in IT

Historic IT Job Market Size - 3.99 million Jobs  
Still Growing

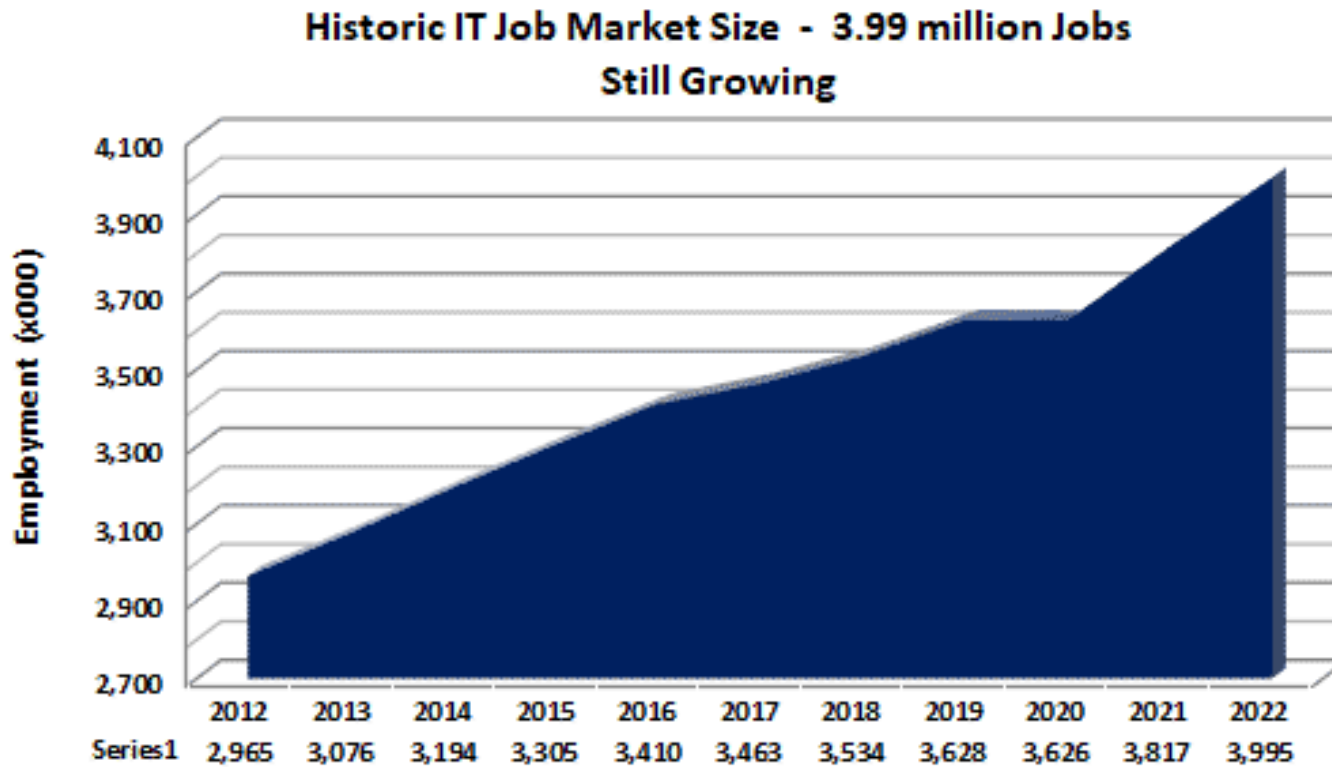


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JANCO ASSOCIATES, INC.

# Workforce Growth in IT



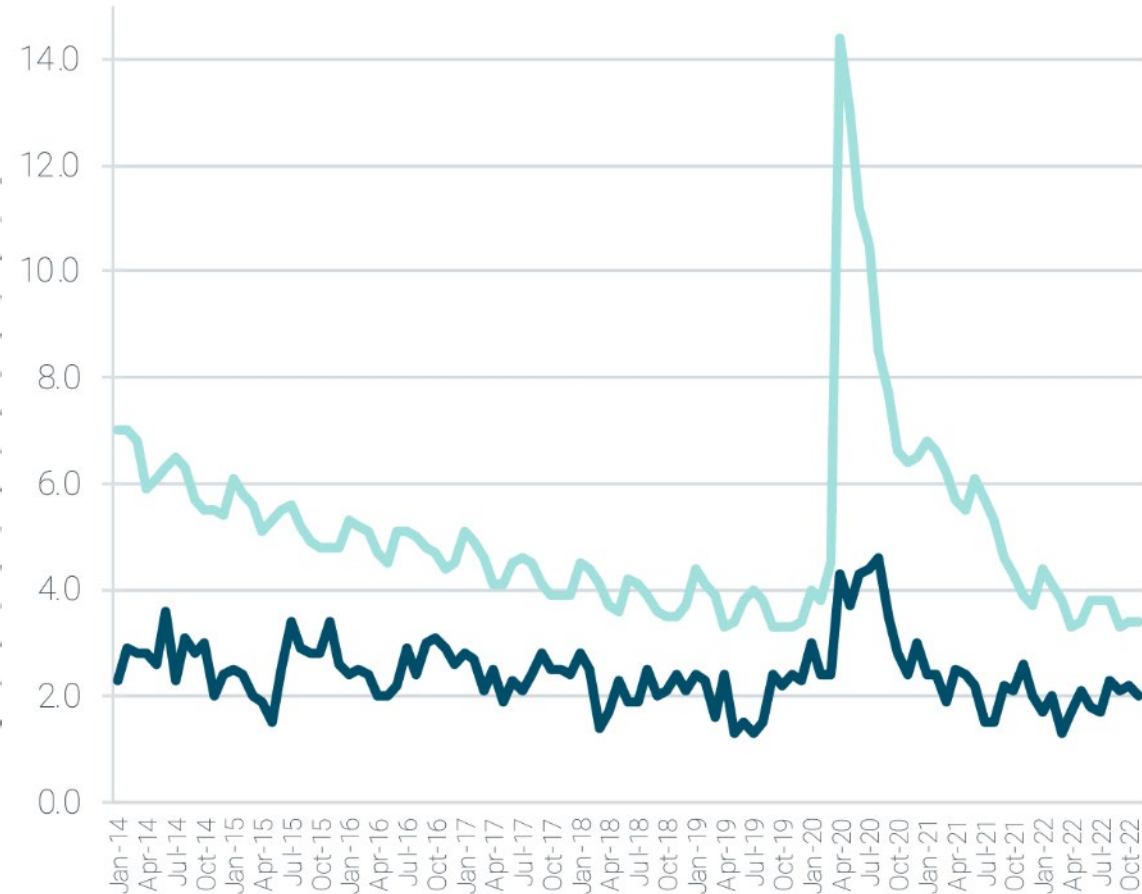
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JANCO ASSOCIATES, INC.

## UNEMPLOYMENT RATE TRENDING

— Tech Occupation Rate — National Rate



CompTIA.

# Many Headwinds in Today's Supply Chain

- Cost Escalation & Volatility
- Materials Shortages & Supply Chain Challenges
- Economic Activity (workload)
- **Workforce**



# Workforce

- Since the year 2000, the US Population has gotten:
  - Older or Younger?

# Workforce

- Since the year 2000, the US Population has gotten:
  - Older by 3.4 years

# Workforce

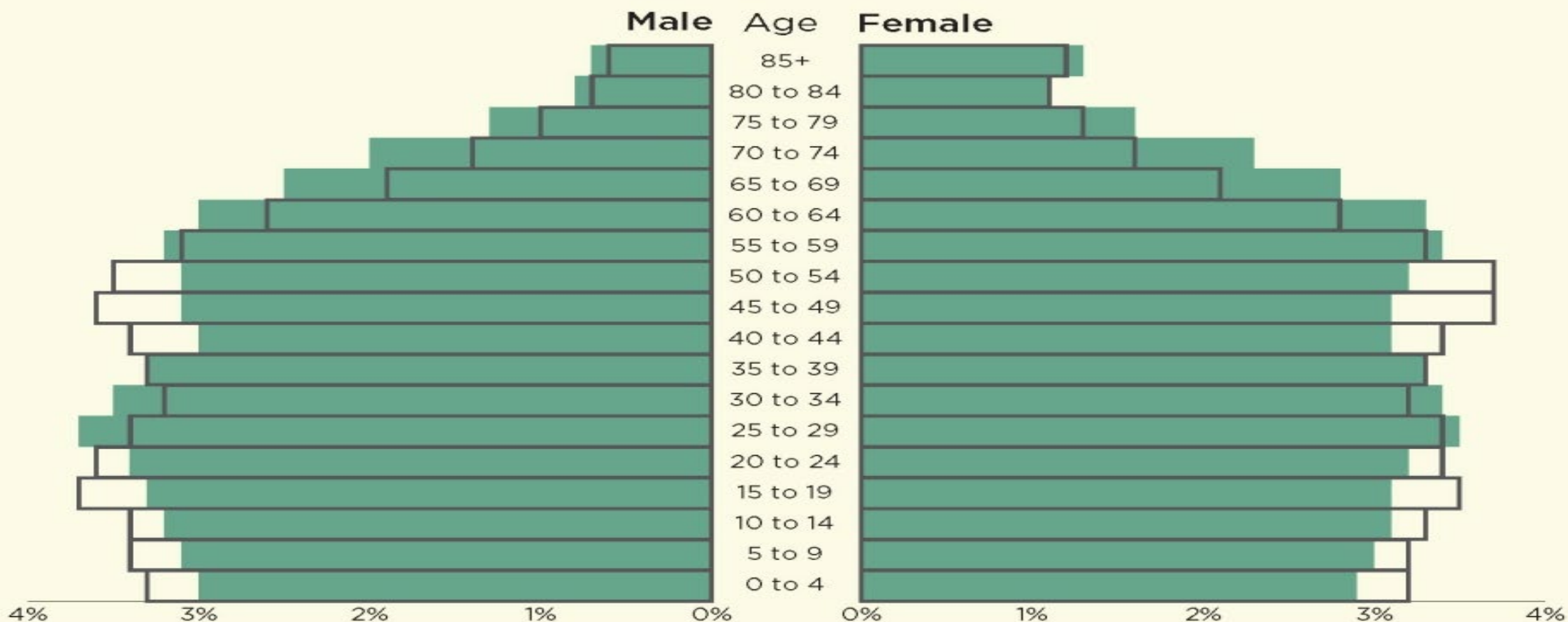
- Since the year 2000, the US Population has gotten:
  - Older by 3.4 years
- This trend is:
  - Accelerating or Decelerating?

# Workforce

- Since the year 2000, the US Population has gotten:
  - Older by 3.4 years
- This trend is:
  - Accelerating (2021 was most rapid increase across the 21yr range)

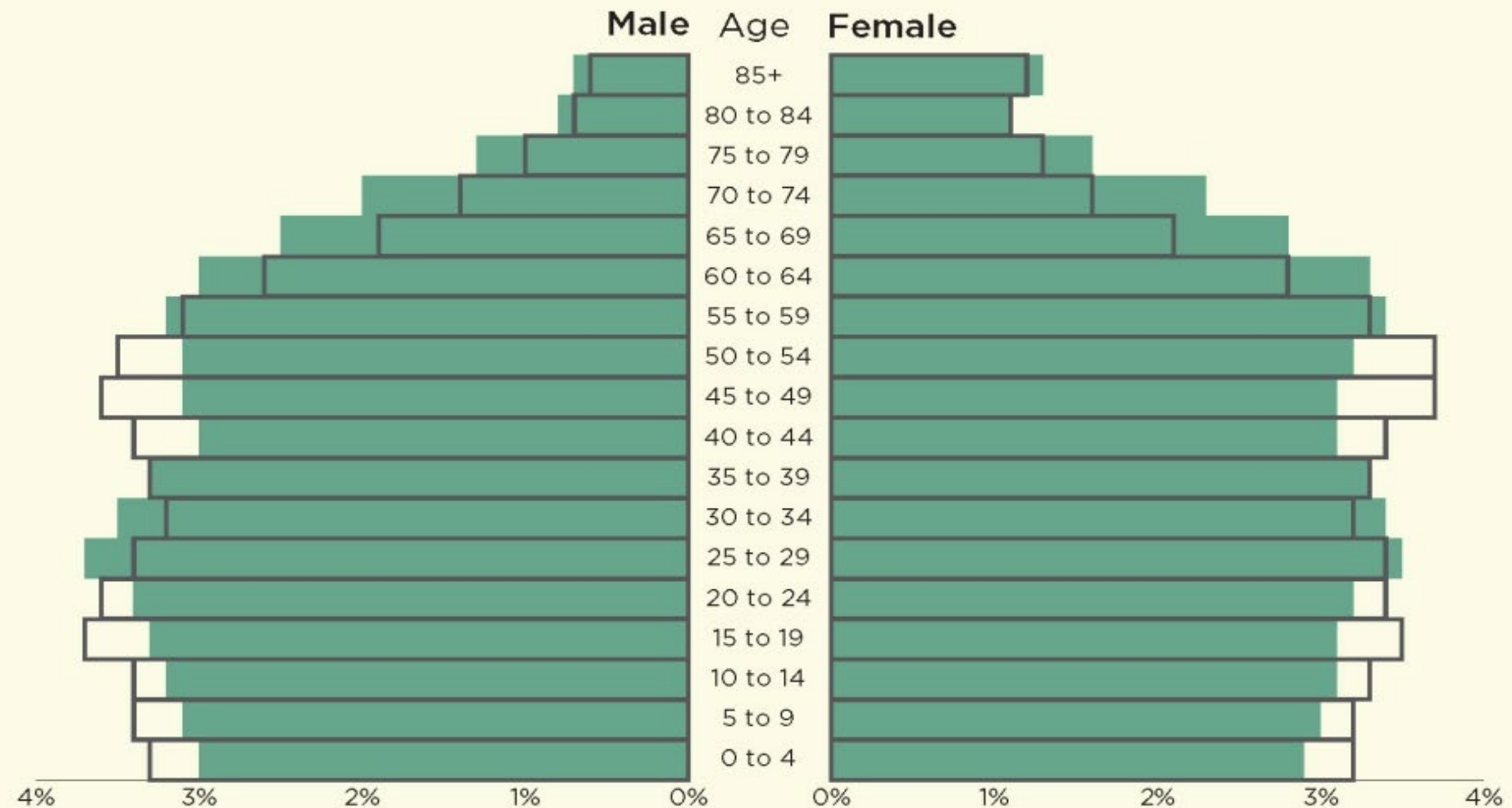
# Percent of Total Population in 2010 and 2019

□ 2010    ■ 2019



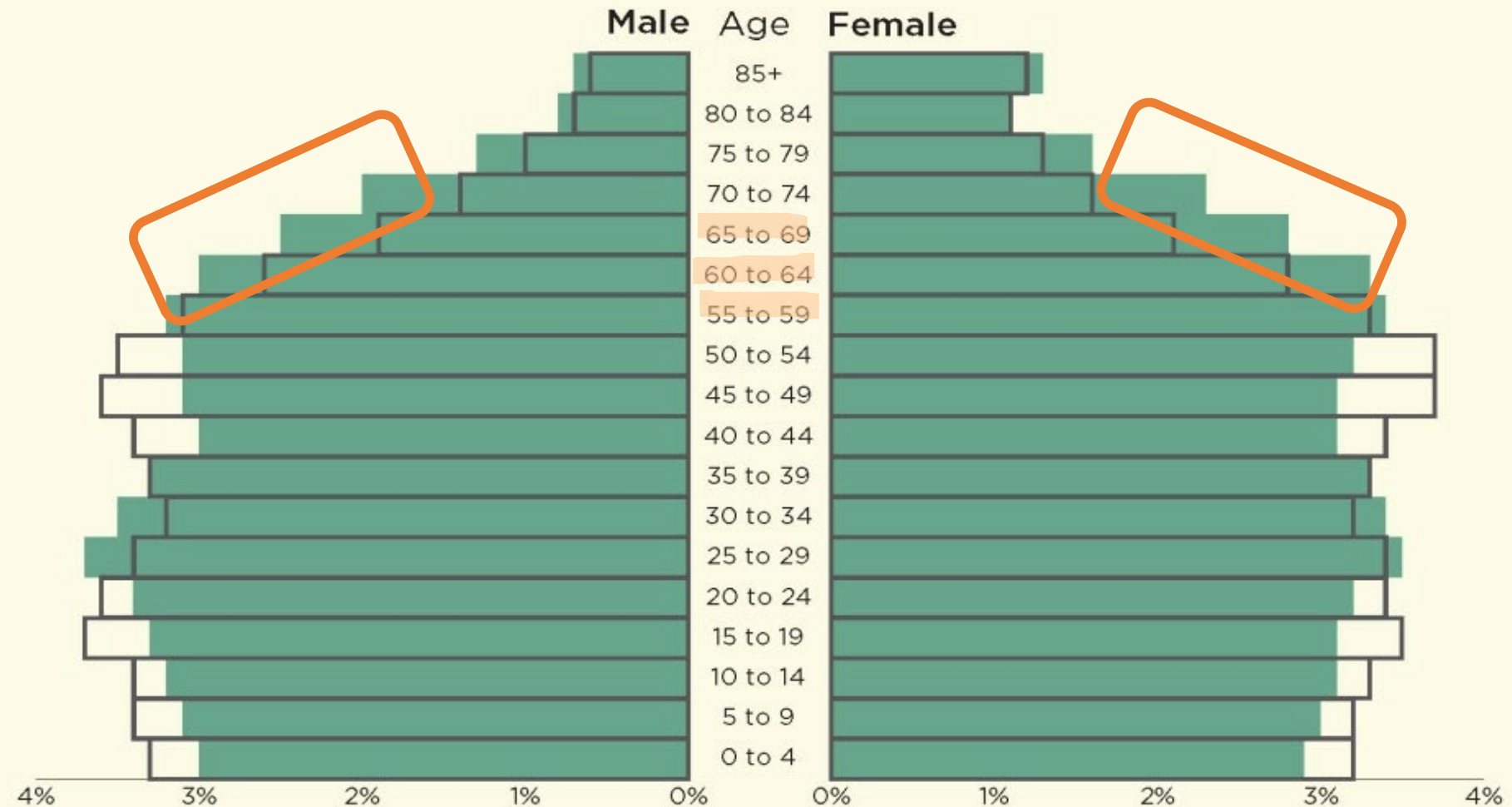
# Percent of Total Population in 2010 and 2019

□ 2010 ■ 2019



## Percent of Total Population in 2010 and 2019

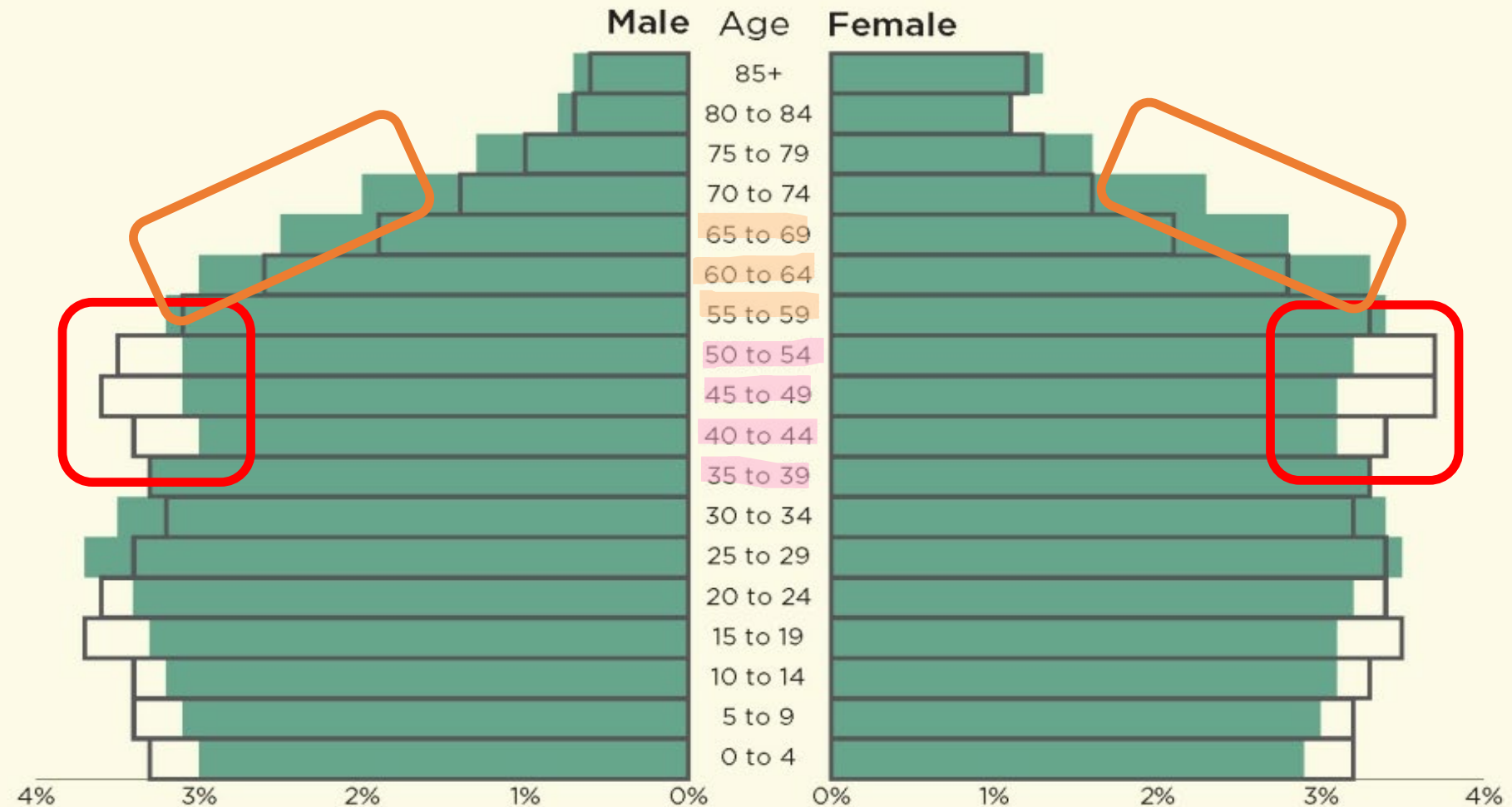
□ 2010 ■ 2019



- Senior Leaders leaving the workforce

## Percent of Total Population in 2010 and 2019

□ 2010 ■ 2019



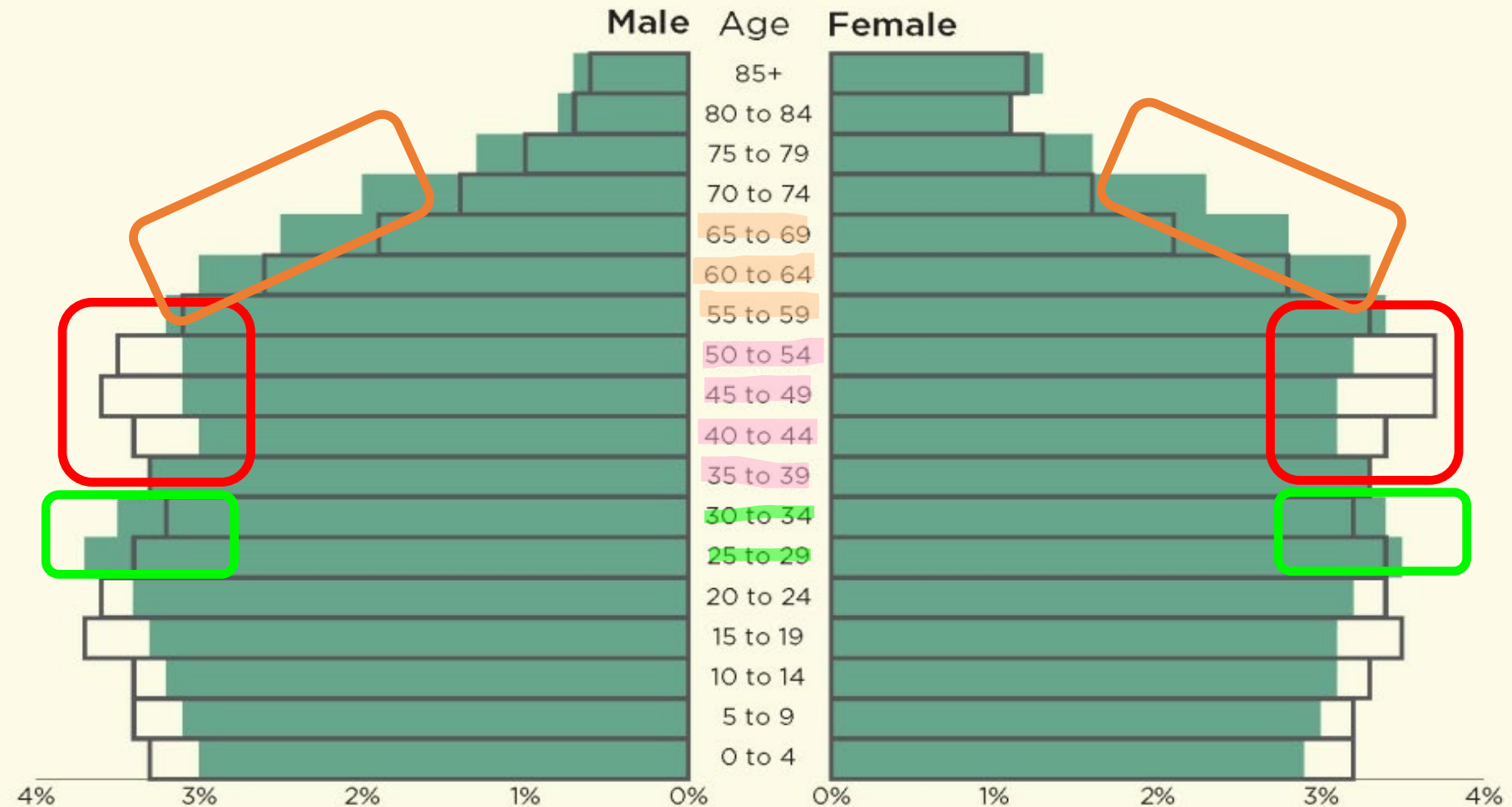
- **Senior Leaders**  
leaving the workforce

- **Next Leaders**  
large gap coming



## Percent of Total Population in 2010 and 2019

□ 2010 ■ 2019

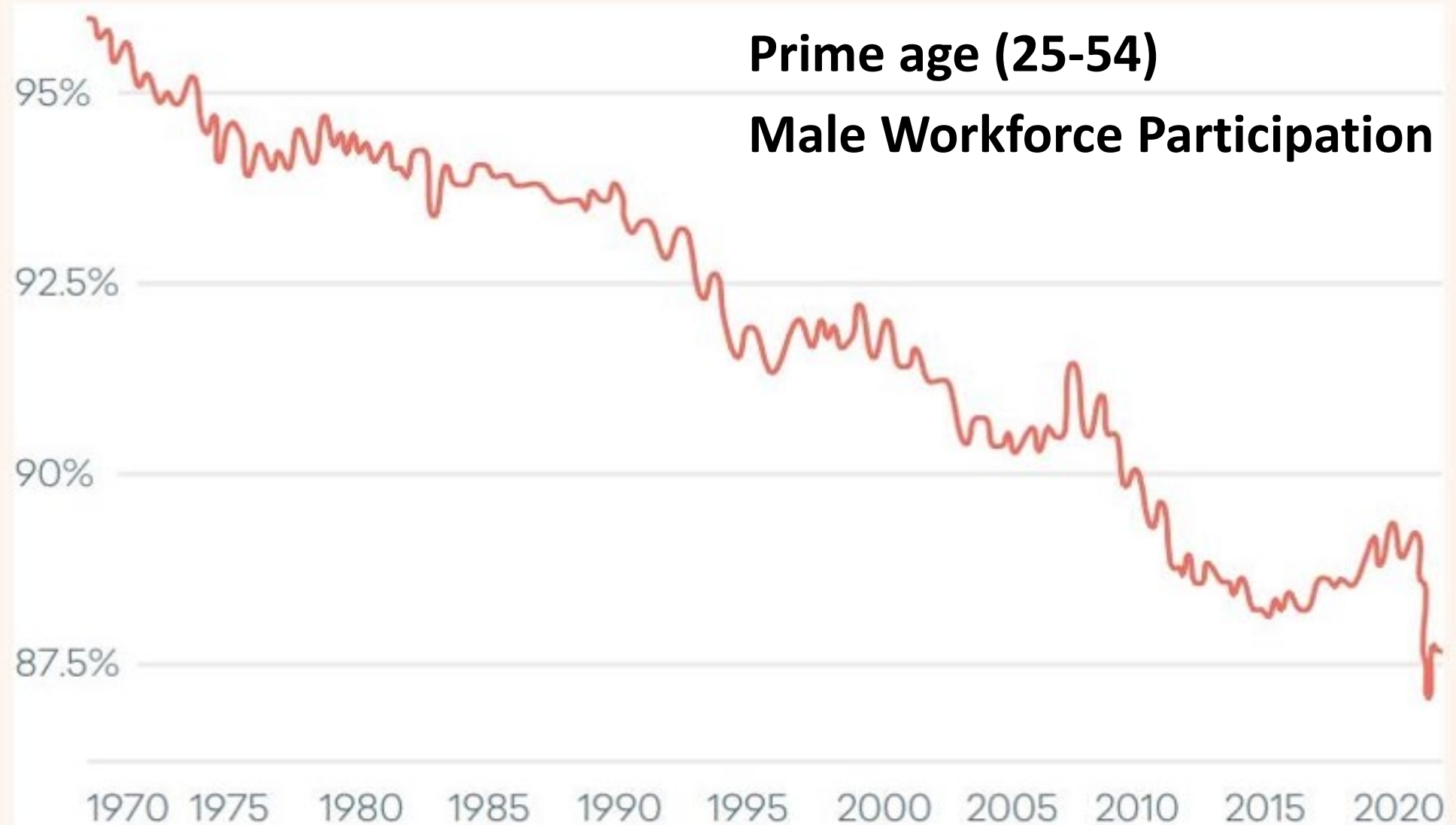


- **Senior Leaders**  
leaving the workforce
- **Next Leaders**  
large gap coming
- **Millennial “Bump”**  
(brief) return to normal

# Workforce

**Prime age (25-54)**

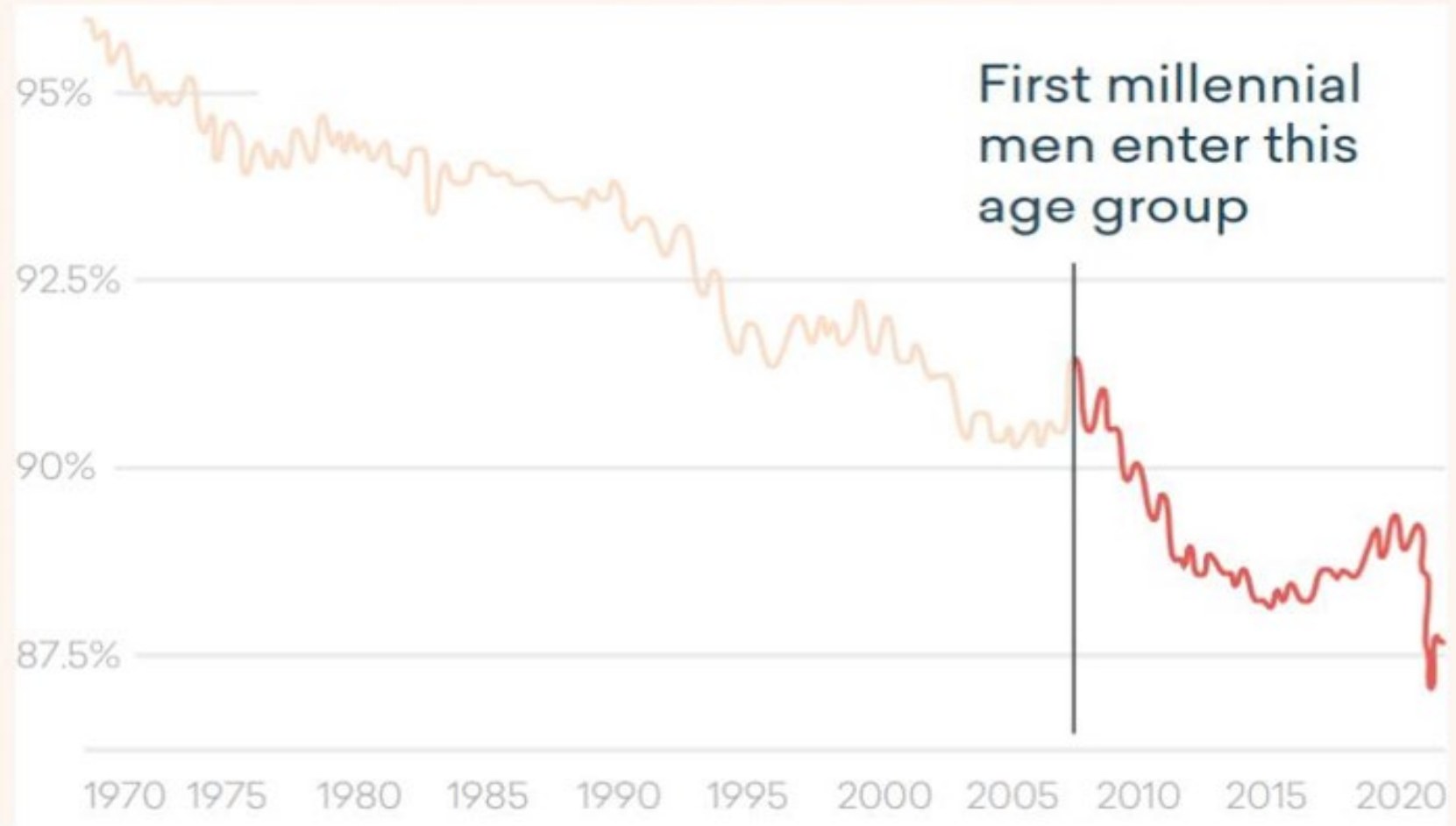
**Male Workforce Participation**



Source: BLS Current Population Survey.

# Workforce

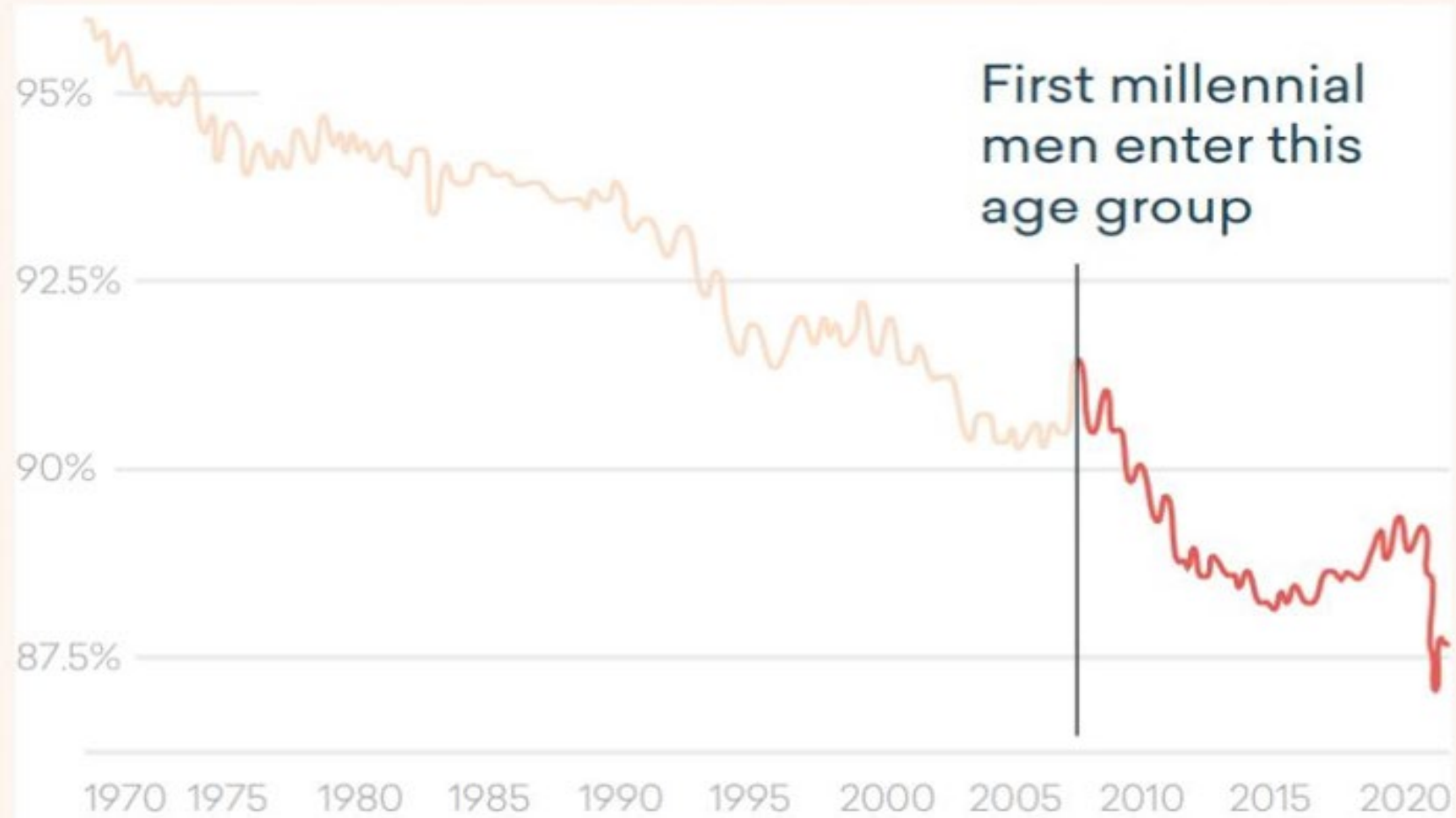
**LFPR for males ages 25-34 tanked as soon as millennials hit those ages**



# Workforce

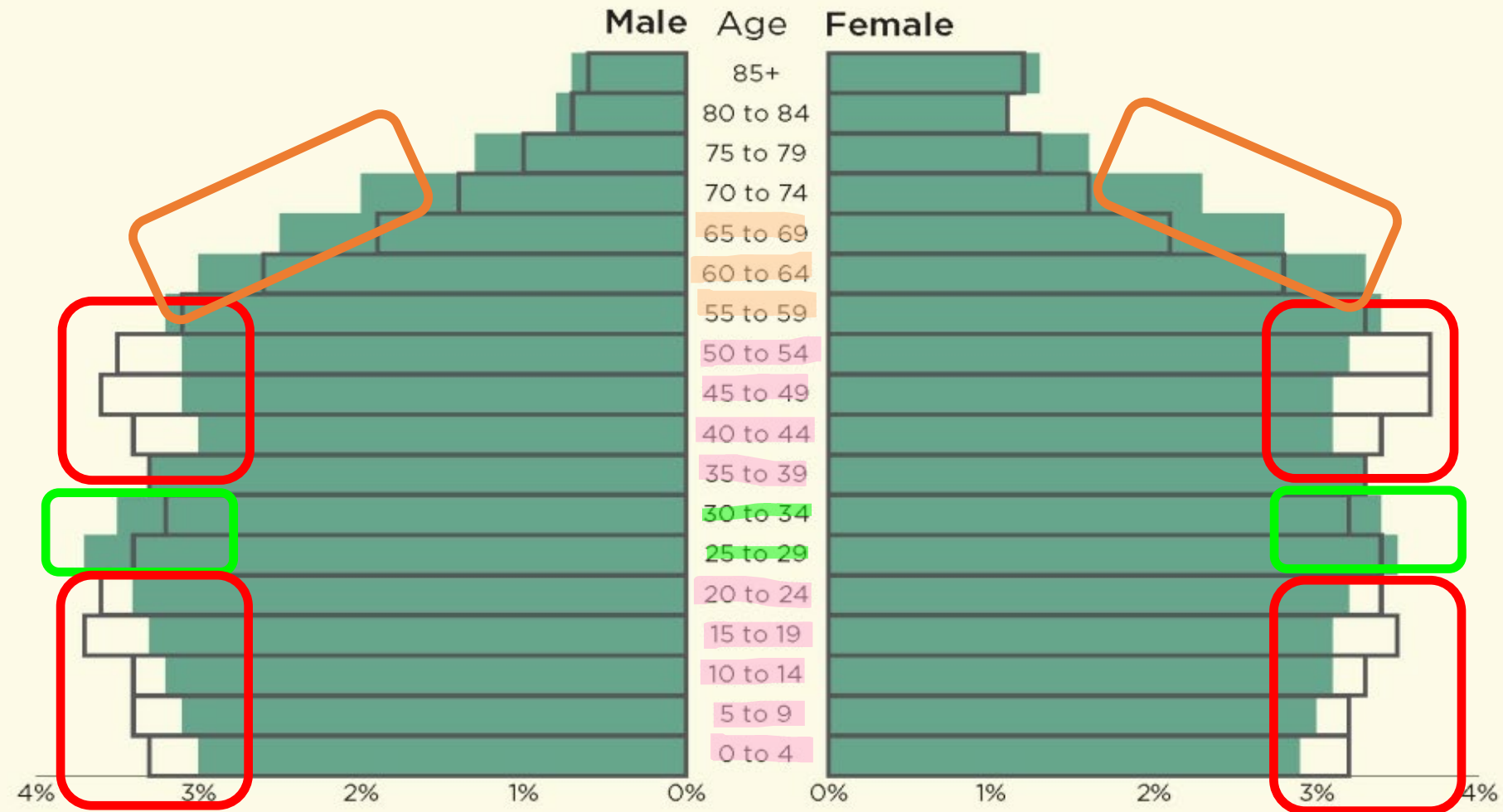
- More men 25-34 yo live with parents than with spouse
  - First time since 1880
- Leisure hours have increased
  - 75% of which are spent playing video and computer games
- Drugs are a big problem
  - Robbing **nearly 1M** prime-age men from the workforce **every year**

## LFPR for males ages 25-34 tanked as soon as millennials hit those ages



## Percent of Total Population in 2010 and 2019

□ 2010 ■ 2019

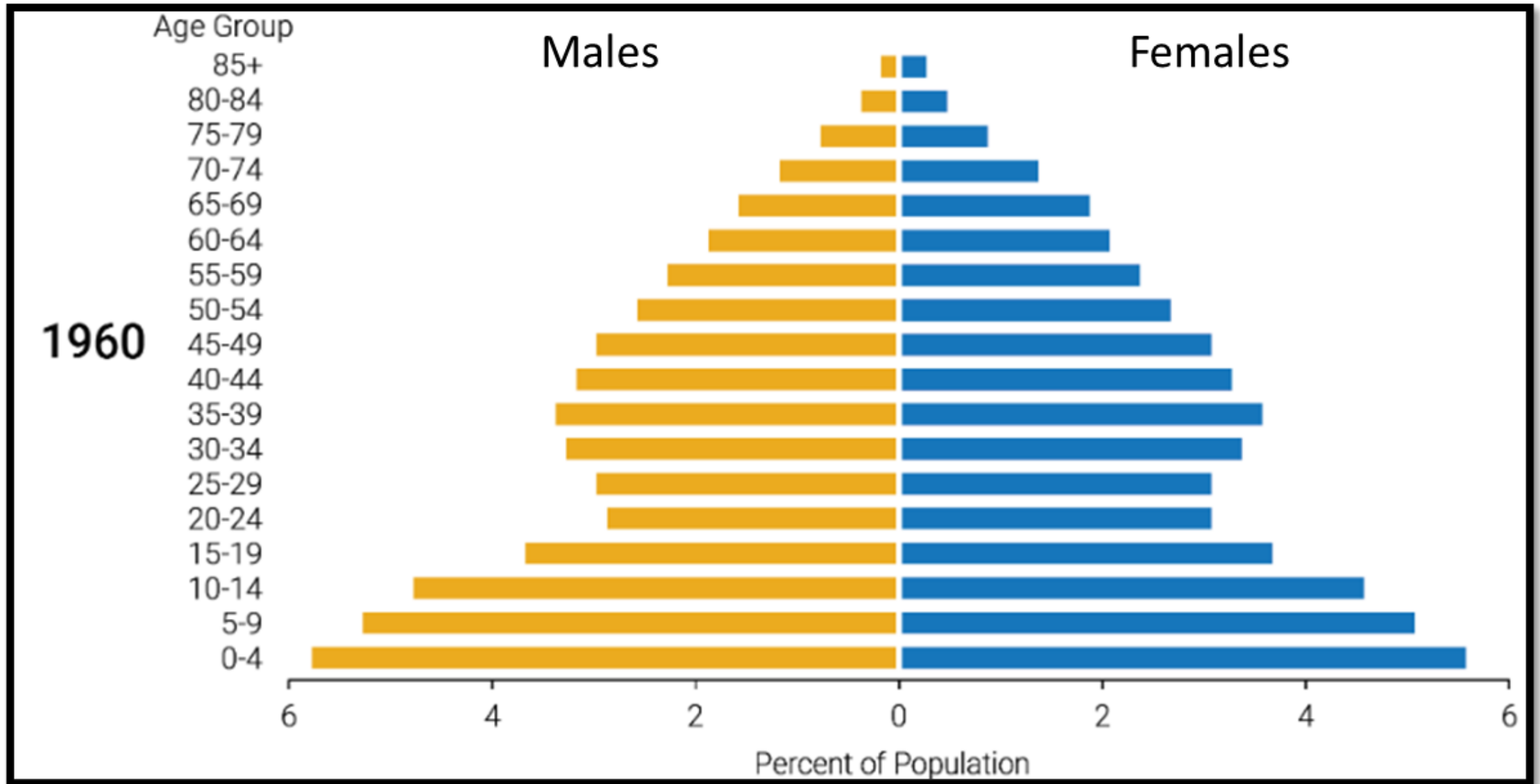


- **Senior Leaders**  
leaving the workforce
- **Next Leaders**  
large gap coming
- **Millennial “Bump”**  
(brief) return to normal
- **Future Workforce**  
shrinking  
reinforcements

# Workforce

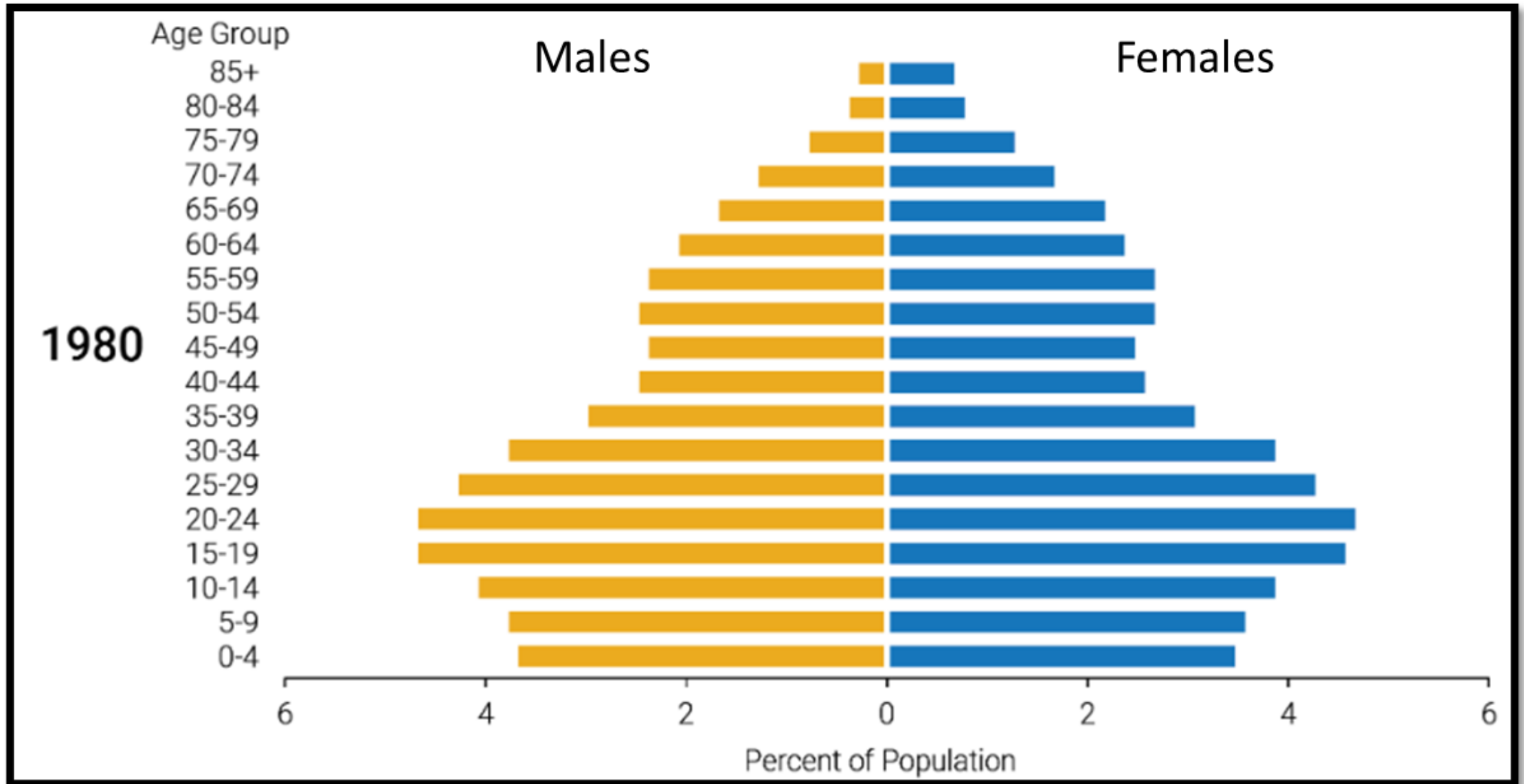
- ***Pre-Pandemic* Forecast of 2020 to 2029** ([www.dol.gov](http://www.dol.gov))
  - Prime Age (25-54) Male Workforce Participation Rates to **decrease** by another 1.9%
  - Prime Age (25-54) Female Workforce Participation Rates to **increase** by 3.8%
  - *but these are % of a decreasing total population in prime age demos*
- **2.4M Women left workforce since Feb 2020**
- **Baby Boomers created incredible wealth**
  - Millennials expected to inherit ~\$70 Trillion by 2030 from their parents

# US Population Histogram



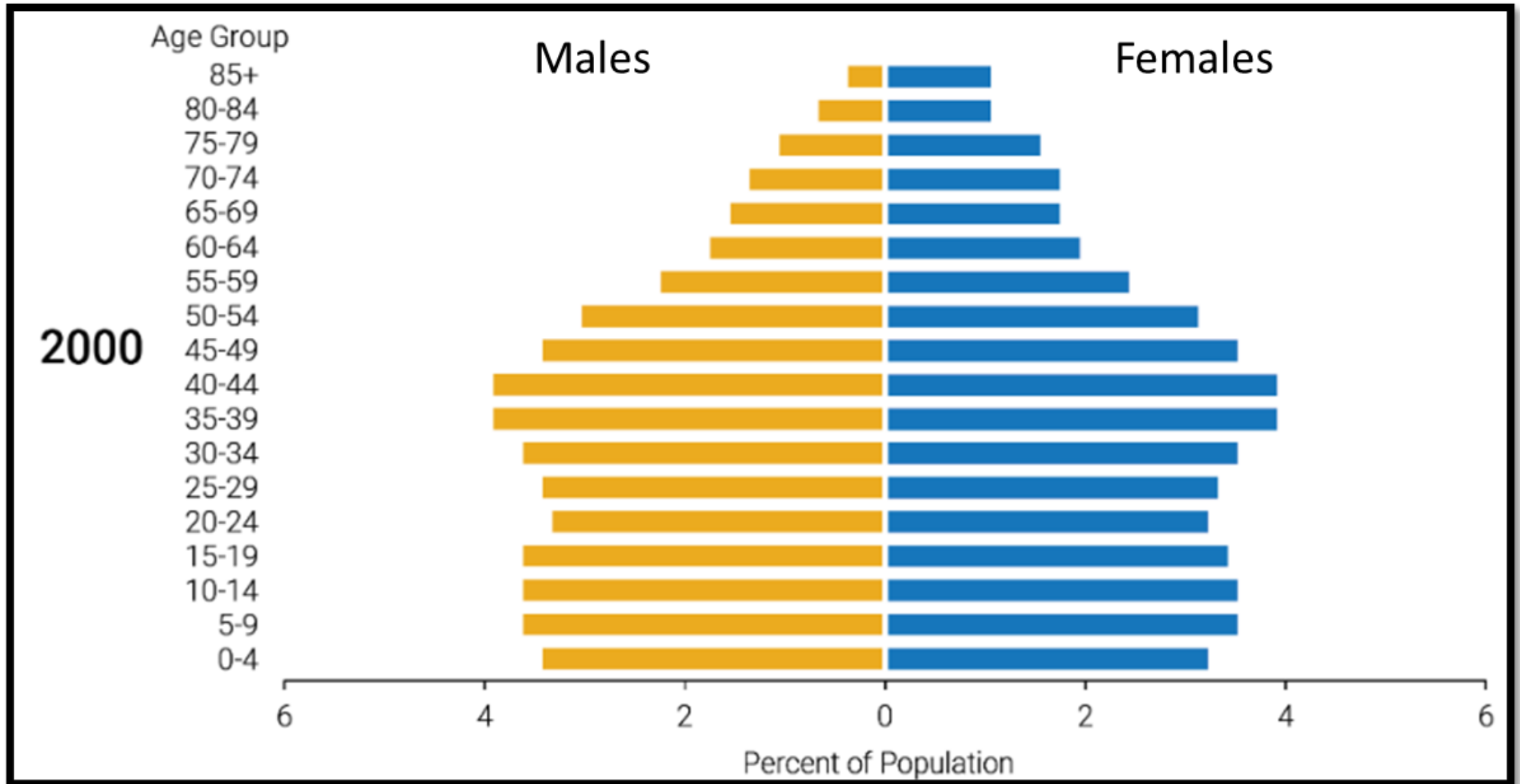


# US Population Histogram

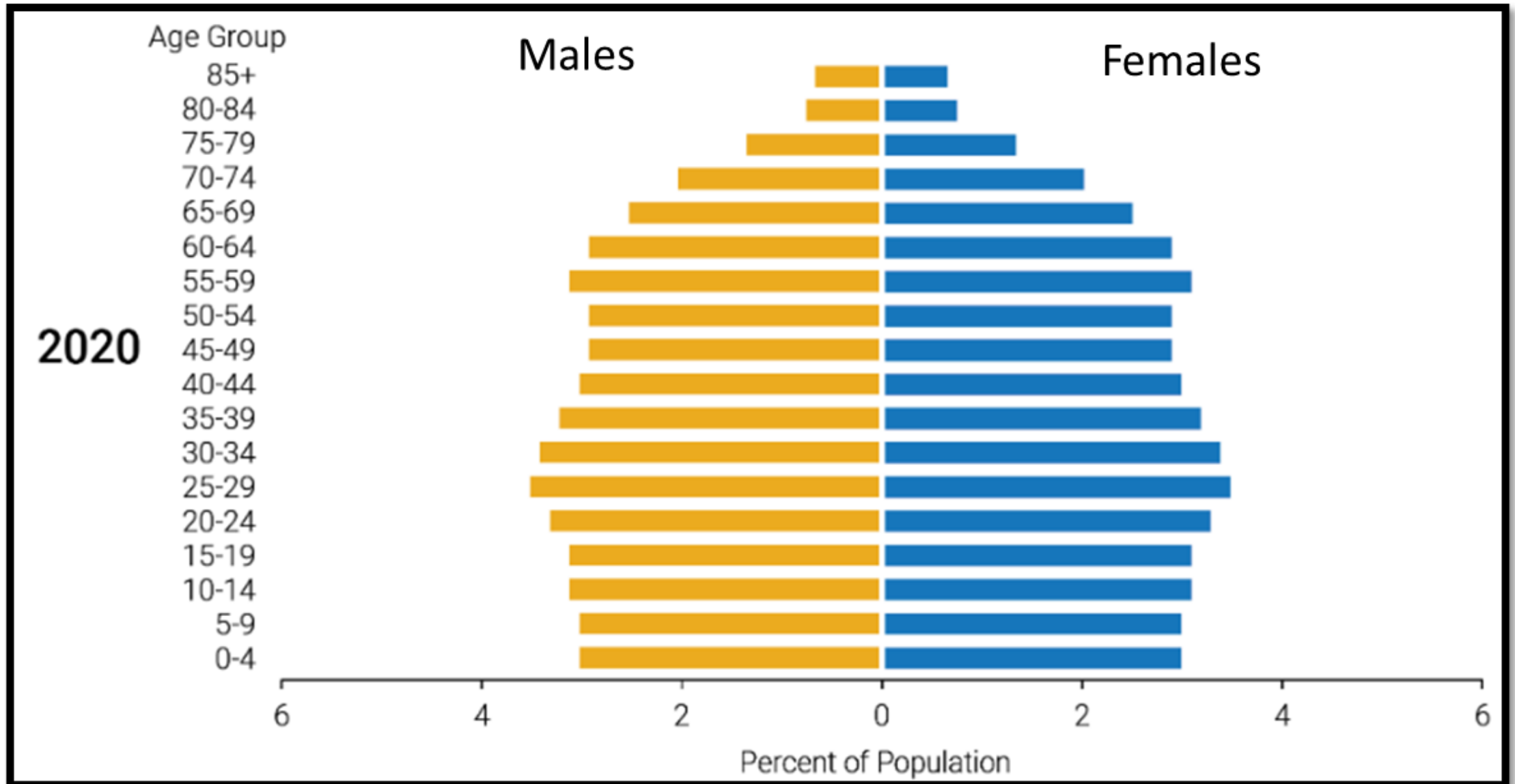




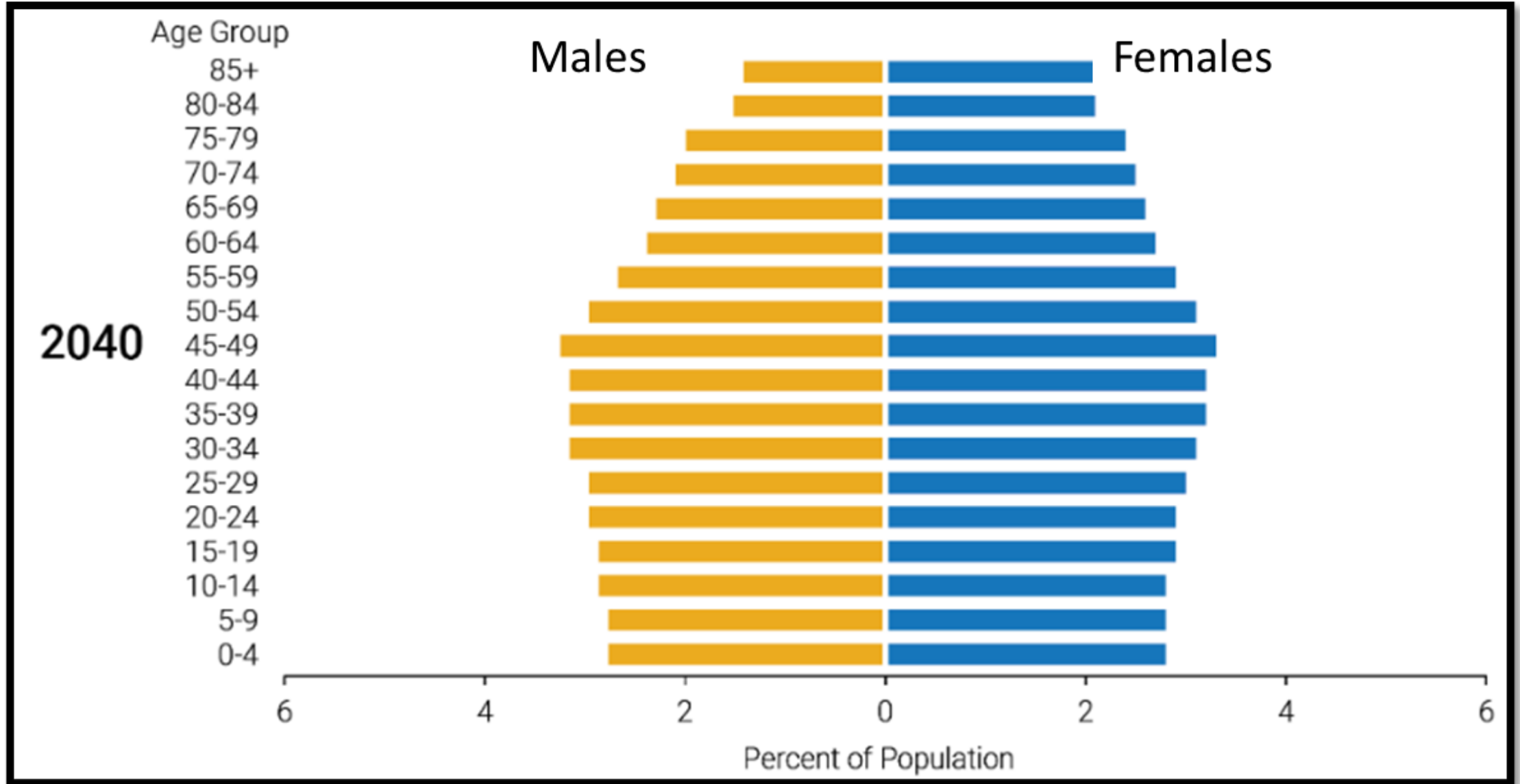
# US Population Histogram



# US Population Histogram



# US Population Histogram



# **Mid- and Long-Term Outlook**

**this is the**

**BEST**

**it will ever be**

**(for the remainder of our careers)**

When You See a Another Employer

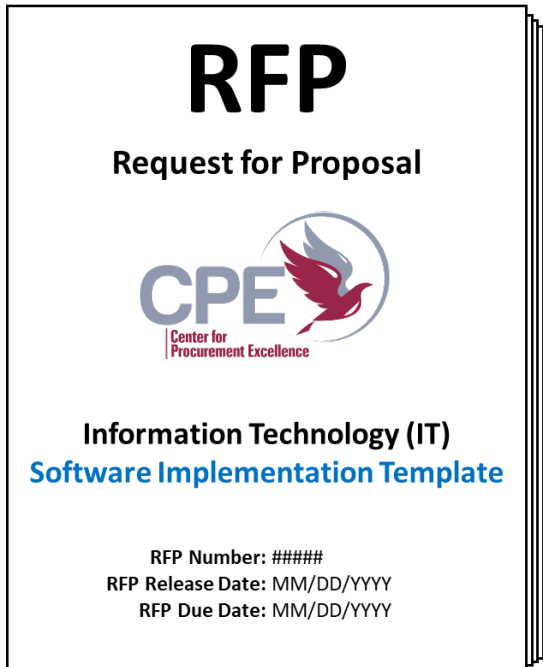
Talking To Your Top Performer



We Want to be seen as a  
“Client of Choice!”

# CPE specializes in High-Performing RFPs

# 1) Prepare & Advertise

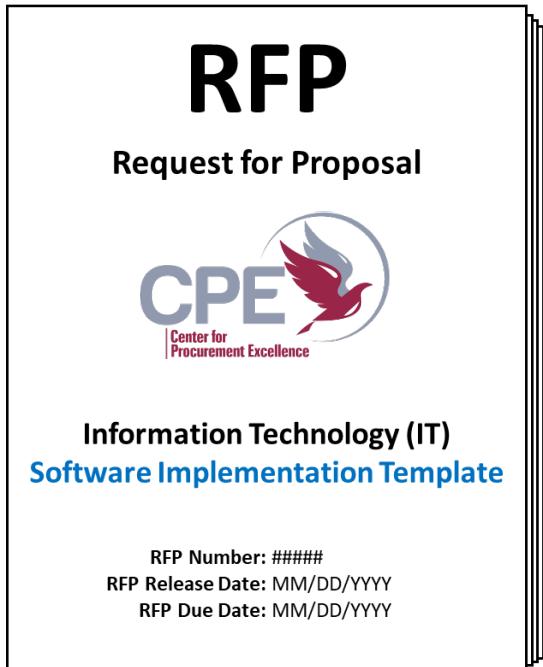


## Procurement Process





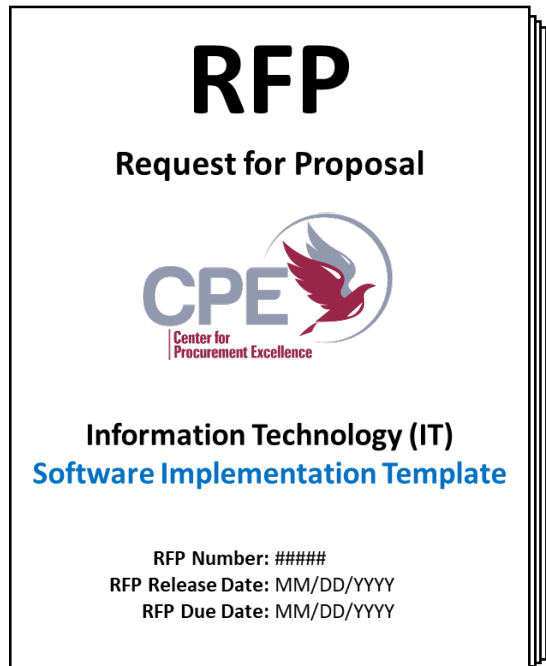
# Vendors Submit Responses



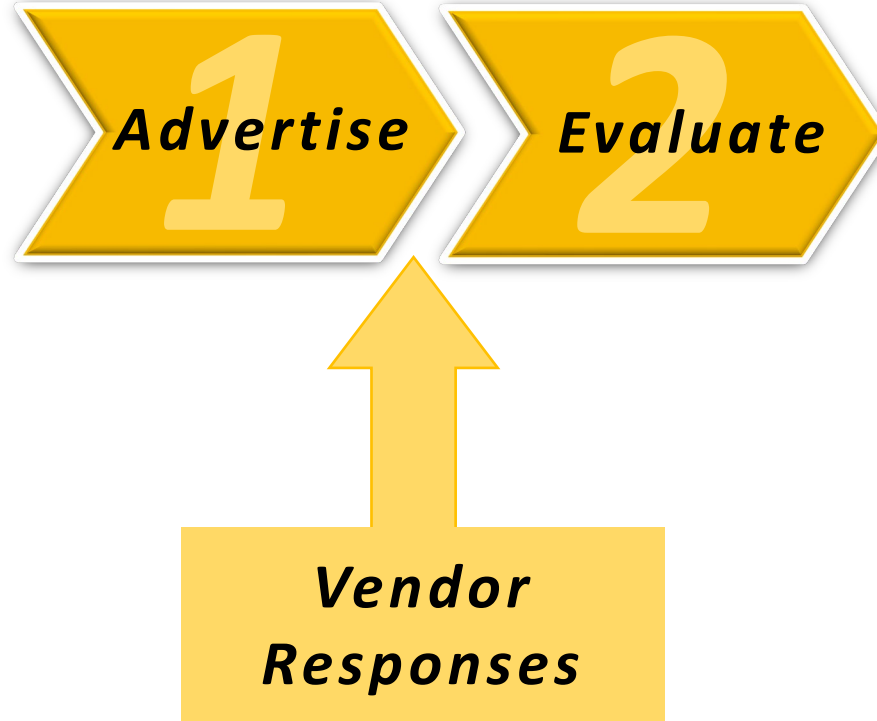
## Procurement Process



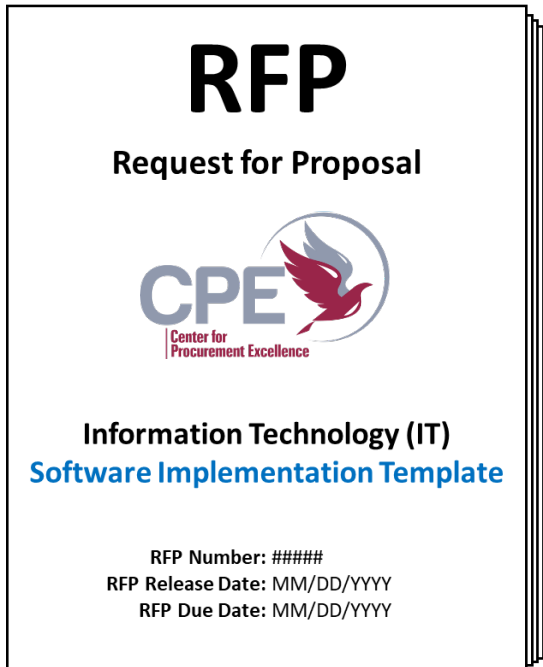
# 2) Evaluate Responses



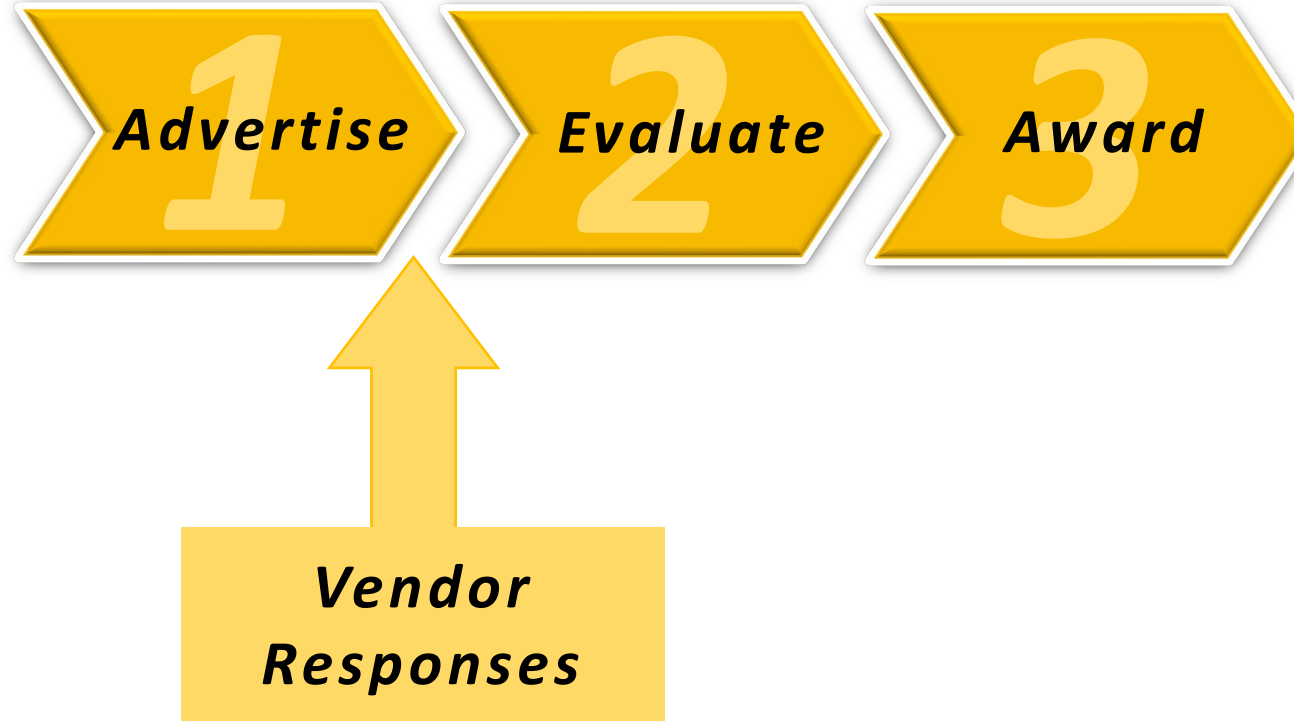
## Procurement Process



# 3) Award Contract



## Procurement Process



# Solicitation Contents

## Solicitation

### Contents

Section 1	Scope of Work
Section 2	Evaluation Criteria and Procedures
Section 3	Administrative Requirements
Section 4	Submittal Forms & Exhibits

- 1) Statement of Work
- 2) Evaluation Criteria & Procedures
- 3) Administrative Requirements
- 4) Submittal Forms & Exhibits

# Industry Acronyms



# 3 Types of Solicitations

## Based On

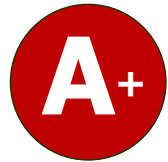
## Award Factors

# 3 Solicitation Award Factors

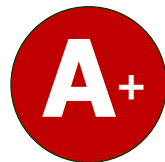
1. Award based on **Cost only**



2. Award based on **Qualifications only**



3. Award based on **Cost & Qualifications**



# Solicitation 1 - Cost Only Award

## Solicitation



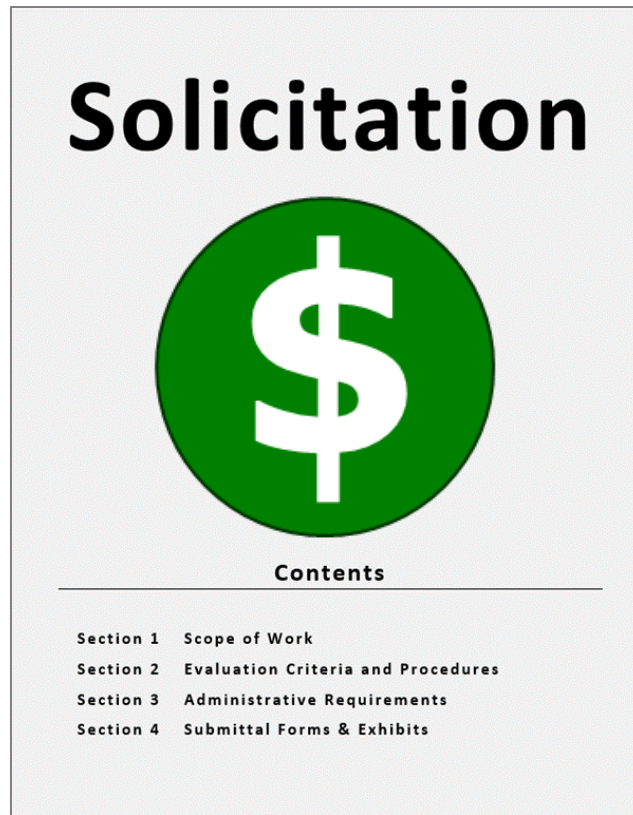
### Contents

---

- Section 1 Scope of Work
- Section 2 Evaluation Criteria and Procedures
- Section 3 Administrative Requirements
- Section 4 Submittal Forms & Exhibits



# Solicitation 1 - Cost Only Award



## Industry Acronyms

**ITB** - Invitation To Bid

**RFQ** - Request For Quote

**IFB** - Invitation For Bid

**RFB** - Request For Bid

**RFT** - Request For Tender

# ITB Mechanics

**Solicitation**

**ITB**

*Advertise*

# ITB Mechanics

**Solicitation**

**ITB**

*Advertise*



**Vendors Submit  
Bid Packages**

# ITB Mechanics








ITB Weakness #1

Treats Project/Service  
as Commodity

# ITB Weakness #1

## Treats Project/Service as Commodity

-  Experience is not considered or valued
-  Qualified personnel is not considered or valued
-  Better solutions are not considered or valued
-  Mitigating risks is not considered or valued
-  Cost is only factor that is important

# Approach to Financial Evaluation



- Traditional approach: largest percentage discount

	<u>Discount %</u>	<u>Furniture List Price</u>	<u>Final Price</u>
Dealer A	50%	\$10,000	\$5,000
Dealer B	58%	\$12,000	\$5,000

**Average of Furniture Program Discounts: 60%**

ITB Weakness #2

Scope of Work  
Must Be Accurate



# ITB Weakness #2

## Scope of Work Challenges

- Complete
- Accurate
- Explicit

## ITB Weakness #3

Assumption That Vendors  
Can Understand Your  
Statement of Work

# **ITB Weakness #3**

## **Not Everyone Can Understand**

- **Vendors do not all understanding the same way**
- **Vendors do not all perceive the same way**
- **Vendors may not all know how to price your requirements**

# ITB Weakness #4

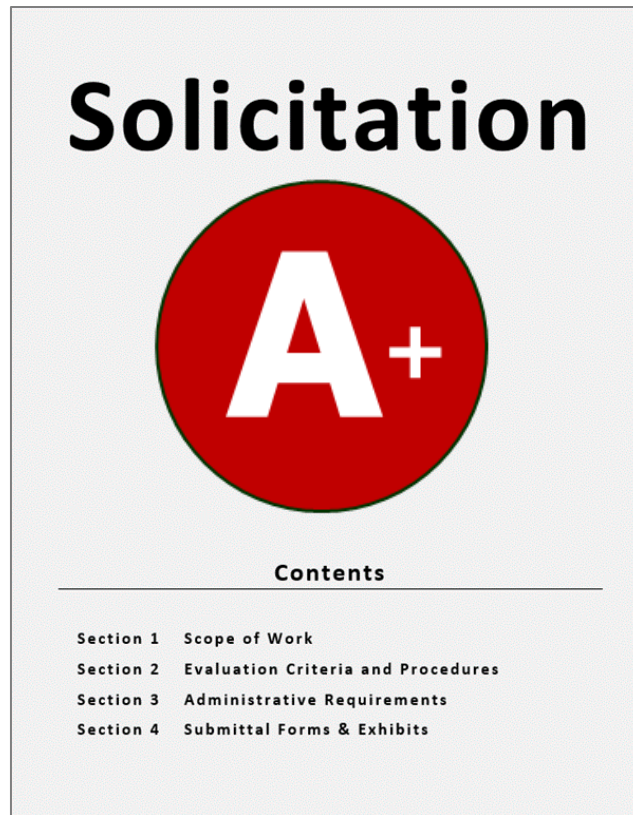
# Poor Performers Can Still Win

# **ITB Weakness #4**

## **Poor Performers Can Win**

- **Experience is not considered or valued**
- **Qualified personnel is not considered or valued**
- **Better solutions are not considered or valued**
- **Mitigating risks is not considered or valued**

# Solicitation 2 - Qualifications Only Award



## Industry Acronyms

**RFQ** – Request For Qualifications

**SOQ** – Statement Of Qualifications

**QBS** – Qualifications Based Selection

# Solicitation 3 | Cost + Qualifications

## Solicitation

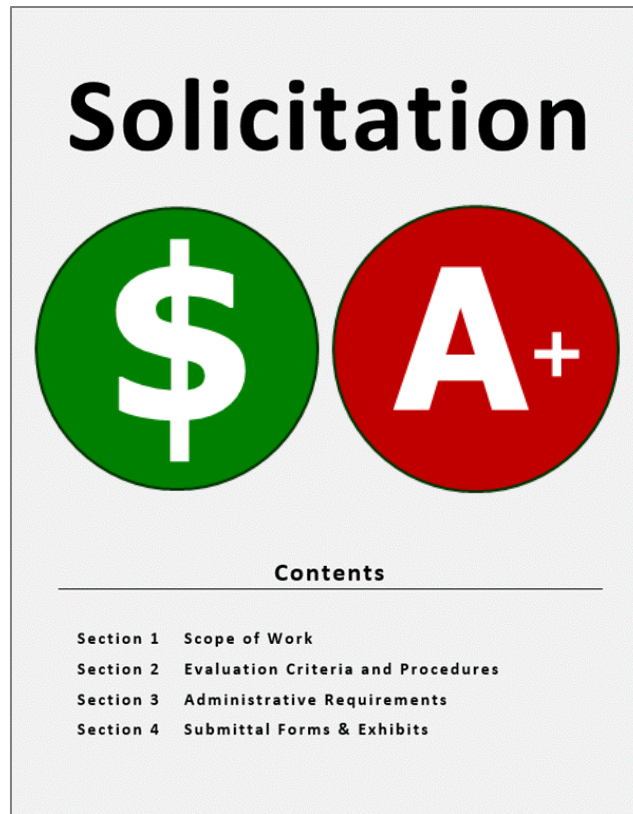


### Contents

---

- Section 1 Scope of Work
- Section 2 Evaluation Criteria and Procedures
- Section 3 Administrative Requirements
- Section 4 Submittal Forms & Exhibits

# Solicitation 3 | Cost + Qualifications



## Industry Acronyms

**RFP** – Request For Proposals

**RFS** – Request For Solution



# RFP Mechanics

**Solicitation**

**RFP**

*Advertise*

# RFP Mechanics

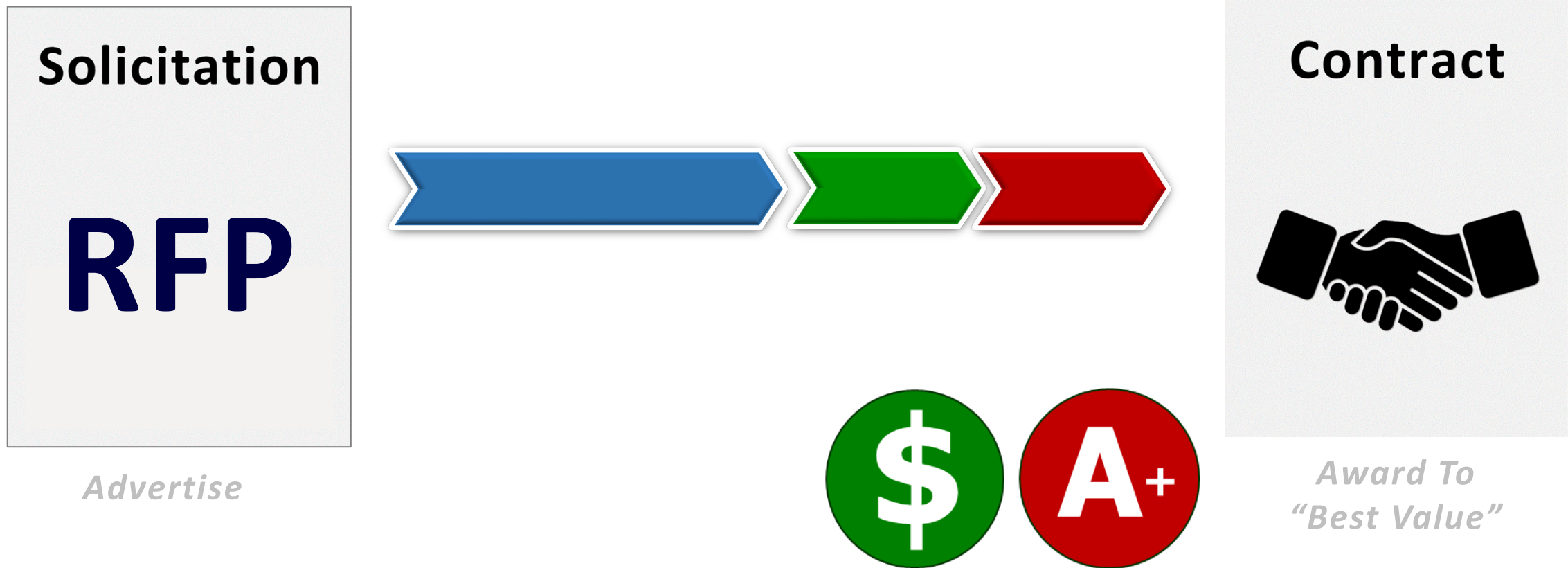
**Solicitation**

**RFP**



*Advertise*

# RFP Mechanics



# RFP Challenges

- **More complex** (multiple award factors)
- Requires **more resources** (evaluation team, read responses)
- Evaluation **takes more time**
- Decision is more **difficult to defend** (they are opinions)
- Opportunities **for collusion** (can be used to pick favorites)

# Second handout in “Handouts & Templates”



## The Right Approach

**ITB**

*Cost Only*



**RFP**

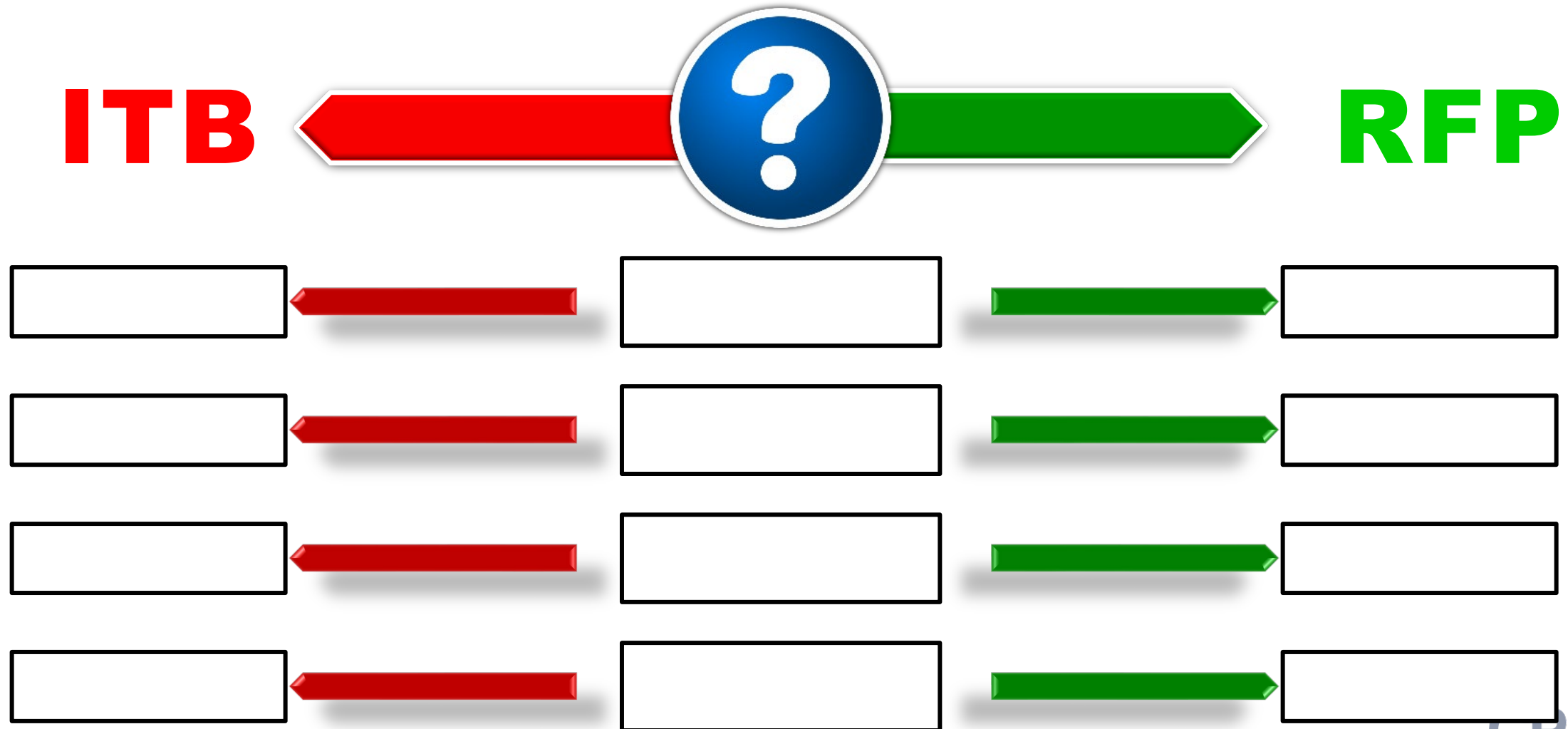
*Best Value*



# Which Is The Right Approach?



# Consider 4 Project 'Traits'



# The Foundations of Procurement Excellence





# See handouts section



## 5 Foundations of RFP Excellence

CPE supports these 5 Foundations of RFP Excellence in all procurement processes as they enable organizations to become a “Client of Choice” and attract High-Performing Vendors across their entire project portfolio

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

#### **Highlighted Practices from CPE:**

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

### **Open: encourage & maximize competition**

#### **Highlighted Practices from CPE:**

- ♦ Reduce “upstream” restrictions on who can propose
- ♦ Avoid burdensome submittal requirements



# Foundations of Procurement Excellence

- Fair
- Open
- Transparent
- Value
- Integrity

# Foundations of Procurement Excellence

- Fair
- Open
- Transparent
- Value
- Integrity

**For each, let's discuss:**

What does it mean?

Why is it important?

How to accomplish it?

# Foundations of Procurement Excellence

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

# Fair: Equal Opportunity to Win

## *Perceptions of Owner being Unfair or Unequal*

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



## *Impact*

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

# Foundations of Procurement Excellence

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

# Foundations of Procurement Excellence

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

# Open: Encourage and Maximize Competition

Who knows the most about delivering the required services?

**An Expert  
Vendor**



# Foundations of Procurement Excellence

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

# 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**
- **Integrity**

# Transparent: Clear, Concise, and Accurate

## Highlighted Practices from CPE:

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

# 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**
- **Integrity**

# 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**

# Value: Optimal Return for the Spend

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

# 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**

# 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.



# Integrity: Ensure Confidence and Trust



# 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.
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# Foundations of Procurement Excellence

- **Fair:** provide all vendors with an equal opportunity to win.
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- **Transparent:** provide a clear, concise & accurate process.
- **Value:** optimize the organization's return for the spend.
- **Integrity:** ensure confidence & trust with high ethical standards.



# Workshop RFP Assessment



# Why RFPs are Essential to Successful Project Outcomes



# Importance of a High-Performing RFP

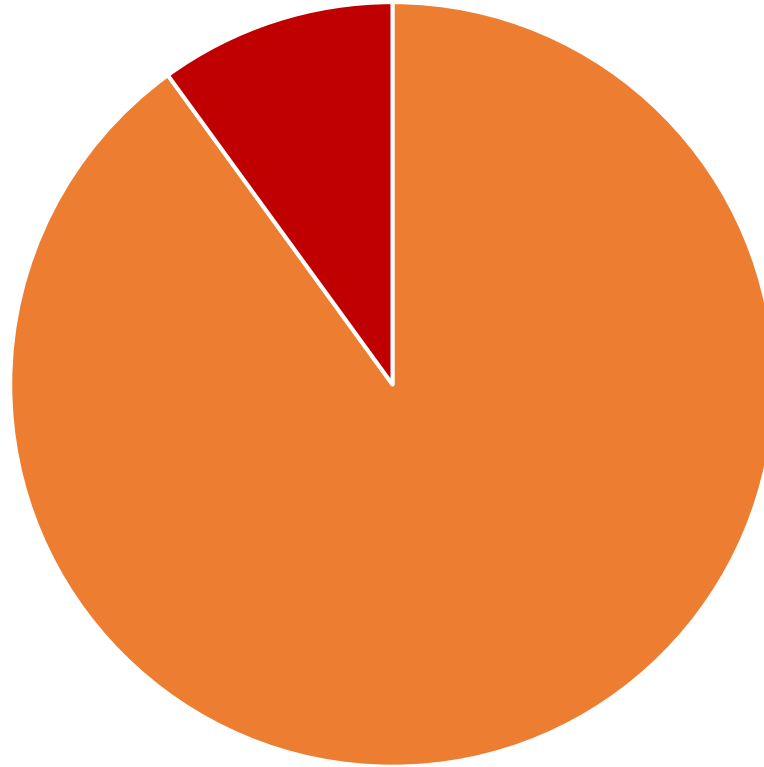
RFPs are a direct reflection of your organization and project.

Is your RFP...

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

# All Procurements Are Urgent!

**10%** Extremely Urgent



**90%** Urgent





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



# Common Things that Slow Down Procurement

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

# Organizing a High-Performing RFP



# Center for Procurement Excellence RFP Templates

# RFP

Request for Proposal



Information Technology (IT)  
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

## Our Goal:

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



# Center for Procurement Excellence RFP Templates

# RFP

Request for Proposal



Information Technology (IT)  
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

Keep In Mind:

Different Projects  
require Different RFP Specifics.

Yet the RFP **Structure & Organization**  
can remain the same!



# Center for Procurement Excellence RFP Templates

# RFP

Request for Proposal



Information Technology (IT)  
Software Implementation Template

RFP Number: #####  
RFP Release Date: MM/DD/YYYY  
RFP Due Date: MM/DD/YYYY

## Why is this Important?

Your RFP is a “first view” for the  
**Vendor Community**

The RFP **structure & content**  
drives the RFP outcome!





The background of the slide is a dark blue/black field filled with numerous thin, bright white and light blue lines. These lines radiate outwards from the center, creating a sense of high speed or light rays. The lines vary in length and angle, some appearing as straight streaks while others are slightly curved.

What can we do  
to move procurement  
into LIGHT speed?

# Center for Procurement Excellence RFP Templates

## RFP

Request for Proposal



Information Technology (IT)  
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

### Goal: Organize a High-Performing RFP

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







# Center for Procurement Excellence RFP Templates

## RFP

Request for Proposal



Information Technology (IT)  
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

### Goal: Organize a High-Performing RFP

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

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

**I'm so excited.**



Ooooh,  
I ♥ CPE's  
RFP Templates!



**But  
sometimes,  
we run out  
of grape jelly**



# Organizing a High-Performing RFP

# RFP

Request for Proposal



**Information Technology (IT)**  
**Software Implementation Template**

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY



# Organizing a High-Performing RFP

## RFP

### Request for Proposal



### Information Technology (IT) Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

1 Statement of Work

2 Current Conditions

3 Proposal  
Requirements

4 Evaluation  
Procedures

5 Administrative  
Requirements

6 Proposal Forms

7 Attachments  
& Exhibits

# Organizing a High-Performing RFP

## RFP

Request for Proposal



Information Technology (IT)  
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

1 Statement of Work

What You Want to Achieve

2 Current Conditions

3 Proposal  
Requirements

4 Evaluation  
Procedures

5 Administrative  
Requirements

6 Proposal Forms

7 Attachments  
& Exhibits

# Organizing a High-Performing RFP

## RFP

Request for Proposal



Information Technology (IT)  
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

1 Statement of Work

2 Current Conditions

Where You Are At

3 Proposal  
Requirements

4 Evaluation  
Procedures

5 Administrative  
Requirements

6 Proposal Forms

7 Attachments  
& Exhibits



# Organizing a High-Performing RFP

## RFP

Request for Proposal



Information Technology (IT)  
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

1 Statement of Work

2 Current Conditions

3 Proposal Requirements

4 Evaluation Procedures

5 Administrative Requirements

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7 Attachments & Exhibits

What Will Be Evaluated

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How the Client will Score & Award





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General Instructions, Dates & Contact



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Forms for Vendors to Complete

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Supplemental Information



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What goes in  
each section?

# Common Mistake: Mixing the Sections

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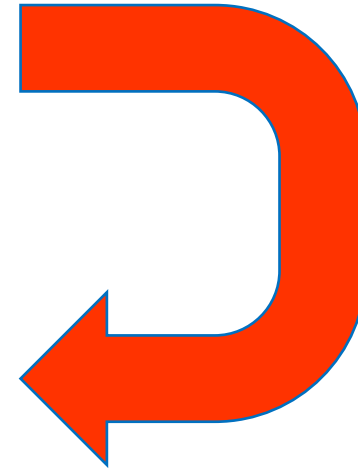
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What can we do  
to move procurement  
into warp speed?

# Common Mistake: Mixing the Sections



## 4.4 GOALS

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

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

### Arsenic

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

### Turbidity

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

### Total Organic Carbons

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

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

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





# Common Mistake: Duplication



## REQUEST FOR PROPOSALS

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

RFP No. 2015-129-ME

RFP ISSUANCE DATE: MARCH 2, 2015

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

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

ISSUED BY:

**MIAMIBEACH**

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

majority of the MBCC renovation completed.

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

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

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

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

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

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

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

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

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

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

### PUBLIC NOTICE

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

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

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

*To be determined - Addendum will be issued with location.*

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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# Proposal Requirements

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

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General Instructions, Dates & Contact



# Administrative Requirements

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

# Administrative Requirements

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



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Forms to Complete



# Take Charge: Client-Defined Proposal Forms!!!

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

# Take Charge: Client-Defined Submittal Forms!!!

SUBMITTAL FORM C-2	
Experience (Critical Project Team Members)	
<i>Instructions: Refer to Section 3.2 for format and roles &amp; responsibilities for each Critical Project Team Member. All responses must be required to be anonymous. The only response that is required to be anonymous is the response for the Critical Project Team Member who is the project manager.</i>	
Insert Critical Project Team Member Information	
Anticipated Time Allocation to the Project	
Brief Narrative of Roles and Responsibilities Insert (add space as needed)	
Resume Insert (add space as needed)	

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

SUBMITTAL FORM B			
Experience & Qualifications			
<b>Software Company Experience</b> Provide information regarding the experience of the Software Company. The information below must ONLY apply to the current version of the Software Solution being proposed <u>and</u> which your Software Company has performed over the past five years. Only solutions that are 100% complete and operational can be counted (on-analysis).			
Software solution	<input type="checkbox"/> 0 <input type="checkbox"/> 1-4 <input type="checkbox"/> 5-9 <input type="checkbox"/> 10-19 <input type="checkbox"/> 20+		
Software solution purchased the	<input type="checkbox"/> 0 <input type="checkbox"/> 1-4 <input type="checkbox"/> 5-9 <input type="checkbox"/> 10-19 <input type="checkbox"/> 20+		
<b>Implementation Company Experience</b> Provide information regarding the experience of the Implementation Company. The information below must ONLY apply to the current version of the Software Solution being proposed <u>and</u> which the Implementation Company has performed over the past five years. Only solutions that are 100% complete and the system is operational can be counted in this analysis).			
Software solution	<input type="checkbox"/> 0 <input type="checkbox"/> 1-4 <input type="checkbox"/> 5-9 <input type="checkbox"/> 10-19 <input type="checkbox"/> 20+		
Software solution purchased the	<input type="checkbox"/> 0 <input type="checkbox"/> 1-4 <input type="checkbox"/> 5-9 <input type="checkbox"/> 10-19 <input type="checkbox"/> 20+		
Team Members proposed in Submittal Form A:			
Project Manager	Solution Architect	Func./Bus. Lead	Tech./Data Lead
Software solution managed/led using the same software product & version being proposed (#)			

Example from  
Software Implementation Project

# Common Mistake: Mixing Requirements



## 3.8 Method of Operation

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

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

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

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

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

**WE HAVE READ AND SHALL FULFILL THE REQUIREMENTS OF SECTION 3.8**  
The bidder must indicate by putting a check mark in the appropriate box marked  
\_\_\_\_Y (Yes) \_\_\_\_N (No).

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

**Keep everything in the  
Submittal Forms**  
**(fill-in-the-blank & checkboxes  
are great there!)**

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Additional Information that  
may be helpful to Vendors.

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

Supplemental Information





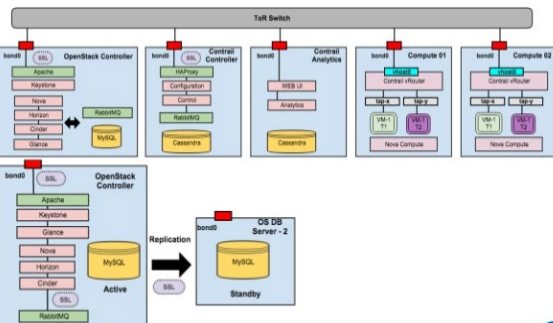
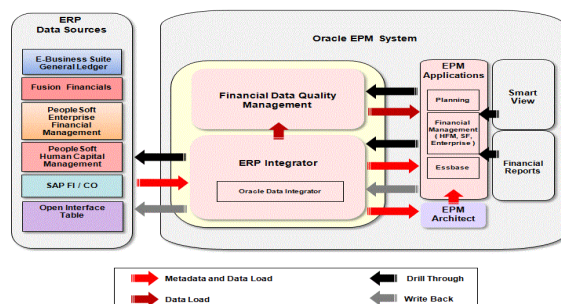
- **Examples of Supplemental Information (IT Software):**

## Workflows

## Glossary of Terms

### Discount Workflow:

### Future State:



It provides a list of current "Pain Points" that represent the Department's current "wanted" conditions that can be used in how Software Providers can be evaluated by the CPMS to a best practice environment.

FIGURE 3: CASHFLOW CONTD.

el Budget - Utiliti  
s for a year or ma  
unds are used for  
or from the rema  
f a bond issue fun  
bond issue it bec  
those funds.

How is the project tracked? Is it a manual process? Is there a spreadsheet to track the project? Is there a spreadsheet?

Excel and graphs:

to compare performance  
P Innoprise does  
tracking available  
to establish cash  
nted project and  
to access, review


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

[illegible]

As an EA, I am often the first contact point for new customers who are interested in our My job is to guide customers to a program or solution that will best meet their needs and appropriate CES staff. I would use the DSM system when answering inquiries to our and steer customers to potential program offerings. I would log potential project leads in the build populate a project lead queue that is utilized by our project development staff. I would enter and project information in the system for a new energy efficiency project. The project would go through a manager review. I'd also be responsible for tracking progress on projects and working with the project manager to ensure projects are completed on time and within budget.

Advanced Metering Infrastructure	used by homes and businesses to use information. The meters will communication between the me
----------------------------------	---

	Average Megawatt. One megawatt (8.760 megawatt hours)
--	---

	Agreements & Rebate Processing Solutions work group that tracks agreements, and contracts.
--	---

ment	eline	Within Conservation Field Operations, energy conservation are assessed what will be done with funding (the 'b') be done without funding (the 'b') for example, the baseline is the the Energy Code.
------	-------	---

	Business Customer Database. our understanding non-resident database. It is a data output file ability to easily search, view, and data.
--	---

no assumptions. I also need relevant attached documents, as necessary (e.g., when I'm

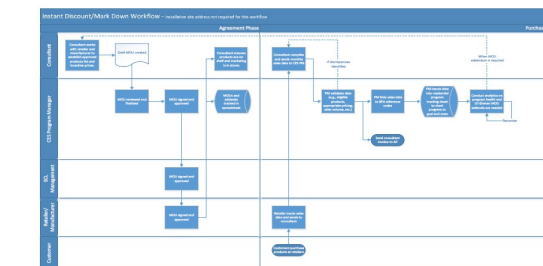
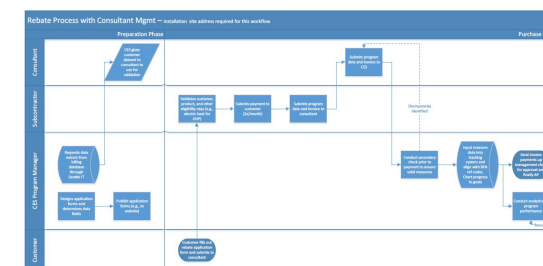
<b>CATS</b>	Conservation Acquisition Tracking System, a tracking system used by the Smithsonian Institution
-------------	---

		Common Area Lighting, and MU programs. Contains historical data
--	--	---

	CCB	Customer Care & Billing system Seattle City Light
--	-----	--

	<b>CCSS</b>	Consolidated Customer Service system used by Seattle City units
--	-------------	---

CES	Customer Energy Solutions. The responsible for assisting customers with energy efficiency projects within their facilities.
-----	---



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# Background

- Budget: **\$50M** | 5-year contract
- **Service components [separate evaluations]**
  - **Wired Telephony**
  - **Data Network Services**
  - **Video Conferencing Services**
  - **End User Support (Help Desk)**



# Existing conditions

- 500 access sites; 77 video end points; 1,400 routers
- 6,200 phones; 30.4M annual phone minutes
- 175 data centers
- 17,000 government staff members



# Risk – Data Networks

			Data Network	
No	Criteria	Possible Points	Firm A	Firm B
1	Price (\$M)	200	\$ 8.4	\$ 4.8
2	Risk Assessment	175	7.5	5.0
3	Value Assessment	125	9.2	7.5
4	Interviews	300	7.1	7.5
5	Multiple Bundle Incentive	50	10.0	10.0
6	Alaska Offeror Preference	100	10.0	10.0
7	PPI	50	9.7	10.0
Total Points		1000	897	919

- Risk: Firm B cost is 45% less
- Asked Firm B to substantiate how they know cost is accurate

# Evidence for Lower Cost

## 1. Cost proposal is in line with Lower 48's cost

Current Lower 48 Data Network Service Rates				
Service	Term	Monthly Lower 48 Price	State of Alaska Monthly Budget	Proposed Monthly Price
2 Gb Data Network Services & Internet	60 Months	\$30,280	\$208,333	\$40,000

## 2. Recent cost comparison for local municipalities for similar service [justifying the 70% difference from budget]

Client	Previous Rate	2014 Rate	% Decrease
Large School District - Alaska	\$160/Mb [2010]	\$23/Mb	85%
Large Multi-National Carrier - Alaskan Business	\$120/Mb [2008]	\$25/Mb	80%
Mid- to Large-Size Alaska-Based Company	\$50/Mb [2011]	\$25/Mb	50%

Cost per Mb  
decreased by  
**78%**

# Benefits to the State of AK

Criteria	Previous Contract	New Contract	Difference
Wired Telephony	\$5.0M	\$3.8M	25% savings
Data Network	\$2.5M	\$0.5M	80% savings
Video-Conferencing	\$1.0M	\$0.7M	30% savings
End-User Support	\$1.5M	\$0.2M	85% savings
Network speed	500 mbps	2 Gbps	400% increase
RFP to Award duration	6-8 months	4 months*	45% savings
Structured pre-planning	No	Yes	--
Overall satisfaction with RFP process and vendors	--	100%	--

*\*including contract pre-planning*

# Other Client Comments

“We struggled to put together an RFP that fully and accurately described all of our technical needs. However, with best value, ***we rely on the expertise of our vendors*** to help identify what is needed. We spent less time trying to figure out our RFP, and more time on pre-planning the implementation.”

“With such a wide-reaching and complex service, the evaluation process was ***surprisingly simple***. The proposals were simple, concise, and the difference between proposers was obvious.”

“We were concerned about the problems that might come with transitioning to a new provider. The ***clarification phase minimizes confusion***, and helps ensure that all parties’ expectations are aligned.”

# High-Performing RFPs for Every Project Type

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### Our Goal:

CPE's Organized & Simplified Structure Remains the Same!

But the content, details & language are tailored to each specific Project Type!

# High-Performing RFPs for Every Project Type

## CPE's Expertise Includes...

- Information Technology

- Typical Software Implementation
- Major Software Implementation (ERP, etc.)
- System Integrator
- Hardware
- Organizational Change Management
- Professional Services

- Facility Management & Operations

- Food/Dining Services
- Janitorial/Custodial
- Waste Hauling/Waste Management
- Operations & Maintenance
  - e.g. MEP/HVAC, Elevators, Safety Valves, Pest Control, Cold Beverage/Pouring Rights, Snow Removal, AMI, Underground Locates, Wireless Telecom, Furniture, Cleaning Products, Security, Landscape, Parking, etc.

- Business & Professional Services

- General Business Services
  - e.g. Audio-Visual, Audit, Banking, Bookstore, Customs, Insurance, Marketing, Medical, Moving, Pensions, Printing, etc.

- Design & Construction

- Architecture/Engineering Services
- D-B-B General Contractor
- D-B-B Construction Roofing
- Design-Build (DB)
- Construction Manager at Risk (CMAR)
- Public-Private-Partnership (P3)
- IDIQ / JOC / On-Call / VoR / Standing Order



# Putting “RFP Excellence” into Practice





Center for Procurement Excellence

# FORM-5520<sup>©</sup>

**Request For Proposal  
Roofing Services**

**<<INSERT ORGANIZATION NAME>>**

**<<INSERT PROJECT NAME>>**



# SECTION 1

## STATEMENT OF WORK

### 1.1 PROJECT SUMMARY

The Owner is soliciting proposals for (insert 1 sentence that briefly describes the scope of work. Try to describe at a very high-level and avoid any technical language or specifics. Should be brief and explain the goods or services sought or a summary of the problem to be addressed. Note that the project details / technical requirements will be described in a later portion of this Section). Include the estimated roof area to be roofed (i.e. 50,000 SF)

### 1.2 BUDGET

Clearly define any financial constraints or expectations that you have. Such as: The construction budget for this Project is \$XXX,XXX or the estimated spend for this Project is \$XXX,XXX

### 1.3 SCHEDULE

Clearly define any schedule constraints or expectations that you have for the project. Note: this is not the procurement schedule requirements, but the post award schedule requirements. Is there a required date that the Project must begin on, or date that the roof must be completed by? Are there any special dates or times that the vendor should be aware of (normal business hours, after hours, support, emergencies, planned shut downs, holidays, days that vendor is not allowed to work, project opening ceremony, etc.) If there is a mandatory completion date, you must identify is it more important to meet the budget constraints or the schedule constraints (you must pick one as more important than the other – they cannot be equally important)

### 1.4 PROJECT LOCATION

Identify where the project will be located. Provide a map/sketch. If possible, identify potential staging areas, parking, critical areas that cannot be impacted, etc.

### 1.5 GOALS

- What is the driving force/need for having this project/service procured?
- Consider if your goal is only to install a roofing system, or are you looking to waterproof your building (minimize leaks) for the longest period of time, for the best cost
- Describe what problems, issues, obstacles, challenges that you are facing now, which you are trying to solve with this procurement
- Identify the major goals, expectations, objectives, or benefits of the new project.

## SECTION 2

### CURRENT CONDITIONS

**PURPOSE:** Paint a picture of your current environment so the Offerors know where you are at, what issues you are currently attempting to solve, and what they may encounter when addressing the Statement of Work. This information will help Offerors minimize their contingency costs by better understanding your current environment.

#### 2.1 ABOUT THE OWNER

Provide a brief / high level overview about the Owner, Agency, Department, or Organization. Consider identifying the major goals of the organization or mission statement (if this is a Public Agency, provide brief overview of who the Agency serves). If applicable, provide any background information about the client/user that is purchasing this roofing project.

#### 2.2 KNOWN SITE & BUILDING CONDITIONS

Provide all known existing conditions about the building, site, users, etc. This can include:

- Identify the location of current building that will be roofed
- Identify if there are any constraints, issues, or challenges with this location
- Identify if there is anything that makes this location unique (that contractors might not be used to or might not have encountered in the past)
- What critical functions are performed in this building (i.e. classroom, office space, high-tech manufacturing, etc.)

**PROPOSAL REQUIREMENTS****3.1 DATE AND TIME REQUIREMENTS**

All proposal packages **MUST** be received before the date and time indicated in the Procurement Schedule in Section 1 ("Proposal Due Date"). Late submittals will not be accepted or considered. It is the responsibility of the Offeror to ascertain any additional security requirements with respect to packaging and delivery to the Owner. Offerors should be mindful of any potential delays due to security screening procedures, weather, connectivity issues, or other delays whether foreseeable or unforeseeable. Failure to submit a response before the Proposal Due Date will result in disqualification of the Proposal.

**3.2 GENERAL FORMAT**

All materials submitted **SHALL** become a part of the proposal, and may be incorporated in a subsequent contract between the Owner and the selected Offeror. All responses/submittals to this RFP **SHALL** be made in accordance with the format outlined below. Failure to submit in the requested format or failure to submit all the required forms may cause a proposal to be deemed non-responsive. The format for the proposal includes the following:

- Shall be written in the English language
- Submitted on standard 8 ½" x 11" paper size using the format that is specified and required in this RFP and each Submittal Form.
- Use Arial or Calibri font, and must have a minimum font size of 10.

**3.3 SUBMISSION REQUIREMENTS**

<<Identify if the Proposal will be submitted via Hardcopy, Online Electronically, or both>> For Example:

The Offeror **SHALL** submit one (1) hardcopy proposal package. The proposal package **SHALL** contain two (2) separate and sealed envelopes, and a USB data stick containing the following information:

ENVELOPE 1: Contains Submittal Form **A-G**

ENVELOPE 2: Contains only Submittal Form **H** (Cost Proposal)

USB Data Stick: Containing an electronic copy of the hardcopy proposal response

The proposal package **SHALL** be submitted in a sealed package containing the two separate envelopes. The Cost Proposal **MUST** be submitted in a separate sealed envelope within the proposal package (as noted above). The proposal should be stapled together or bound in a three-ring binder. Please do not bind the proposals in any

## SPECIAL FORMATTING REQUIREMENTS

The Offeror **MUST** ensure that their Proposal meets all of the special formatting requirements identified in this Section. This includes requirements regarding anonymity and maximum page limits.

**Anonymity:** The Submittal Forms listed below **MUST NOT** contain any names that can be used to identify who the Offeror is (such as company names, company letterhead, personnel names, project names, contractor names, architect names, engineer names, subcontractor names, subconsultant names, manufacturer or supplier names, or product names).

**Page Limits:** The Submittal Forms listed below have maximum page limit requirements. Offerors **MUST NOT** exceed the maximum page limits. Note, the page limit applies to the front side of a page only (for example, '1 Page' implies that the Offeror can only provide a response on one side of a piece of paper).

**Cost Information:** Cost information shall only be contained within Submittal Form I. No other document or Submittal Form may contain cost or fee information

Submittal Form	Anonymous Document	Maximum Page Limits
Submittal Form A – Offeror Background		
Submittal Form B – Project Approach	YES	1
Submittal Form C – Narrative Proposal Items	YES	2
Submittal Form D – Narrative Proposal Items as Needed	YES	2
Submittal Form E – Past Performance Questionnaires		
Submittal Form F – Roofing Warranty Analysis		
Submittal Form G – Schedule Proposal		
Submittal Form H – Cost Proposal		



### 3.10 PAST PERFORMANCE QUALIFICATIONS (SUBMITTAL FORM E)

The Owner will incorporate Past Performance Qualifications (PPQ) from both the Roofing Contractor and primary Roofing Manufacturer. The Contractor and Manufacturer will be responsible for collecting PPQ from past clients as outlined in this section.

#### Step 1) Identify Who To Survey:

- The Contractor and Manufacturer should identify a list of client references that will evaluate their performance on installed roofs.
- The Contractor/Manufacturer should survey clients that are highly satisfied with their roofs.
- There are no age limits on the roofs, however, greater preference will be given to older roofs (so the Contractor/Manufacturer are encouraged to survey old roofs that show long-term performance and satisfaction)
- Roofs must be greater than 5,000 SF (there are no maximum requirements on roof size)
- All roofs must be within 200 miles of the project site/location, OR be from a location that has similar climate/weather (please contact the Buyer if you are unsure)
- The previously installed roofs must be a similar system to the system being proposed on this project. For example, if the Contractor is proposing to install a built-up roofing system, then the past roofs being surveyed must also be built-up roofing systems (the roofs cannot be single-ply, metal, foam, etc.)
- The client/end user must be the reference and shall complete the survey. The survey cannot be completed by contractors, consultants, architects/engineers, or other third parties.
- The maximum number of roofs that can be submitted is 10 for each Contractor/Manufacturer.
- The Contractor and Manufacturer can use the same references provided that they were used on the same project, or may elect to survey different clients.

### 3.11 ROOFING WARRANTY ANALYSIS (SUBMITTAL FORM F)

The Offeror must complete this Submittal Form, which requires a copy of the Manufacturer's roofing warranty (for the primary roofing system that will be installed on the project/building). The sample warranty must also include a copy of the warranty exclusions. The Offeror must identify the warranty exclusions in the Submittal Form. The Buyer will calculate the potential value of the roofing Manufacturer's warranty by taking the total number of warranty exclusions and subtracting them from the Manufacturer's average roof age (obtained from the roofs of the Manufacturer's customer satisfaction responses) or the roofing warranty (whichever may be smaller). See example below:

Criteria	Manufacturer
Manufacturer's Roofing Warranty	25 Years
Average Roof Age (from Manufacturers Past Performance Qualifications)	18 Years
Number of Warranty Exclusions	10
Potential Value of Warranty	8



## SECTION 4

### EVALUATION PROCEDURES

#### 4.1 EVALUATION SUMMARY

Proposals will be evaluated based on their overall value to the Owner, which includes both cost and technical factors (as outlined in this Section).

#### 4.2 CRITERIA AND WEIGHTS

Proposals that are found to be responsive, will be evaluated and assessed in accordance with the evaluation criteria below.

Criteria	Points
Cost	250
Interview of Key Personnel <sup>1</sup>	250
Project Approach	50
Narrative Proposal Items << Items from 4.8 & 4.9>>	150
Potential Value of Warranty	50
Overall Project Duration	50
Past Performance Qualification (Contractor)	100
Past Performance Qualification (Manufacturer)	100
<b>Total</b>	<b>1,000</b>

<sup>1</sup> If the Owner shortlists Offerors, only the shortlisted Offerors will be evaluated and receive points for interviews

## 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 services>> <<Try to describe at a very high-level and avoid any technical language or specifics, which will be described later 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 (via email) to this individual. Offerors shall not contact or communicate with any other Owner employees. 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

## SECTION 6

### PROPOSAL FORMS

Submittal Form A	Offeror Background
Submittal Form B	Project Approach
Submittal Form C	Narrative Proposal
Submittal Form D	Narrative Proposal as Needed
Submittal Form E	Past Performance Qualifications
Submittal Form F	Roofing Warranty Analysis
Submittal Form G	Schedule Proposal
Submittal Form H	Cost Proposal

## 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
	\$
	\$
	\$

### CRITICAL TEAM MEMBERS

Identification of the critical project team (shown below), which shall be used by Offeror for the duration of the Contract resulting from this RFP. These individuals cannot be removed or replaced, unless requested or approved to do so by the Owner.

Name of Project Manager \_\_\_\_\_

Name of Site Superintendent \_\_\_\_\_

The Project Manager: this individual shall be the daily single-point-of-contact and the primary point of contact to resolve any issues, clarify cost, clarify schedule, and answer any questions. This individual will be the project lead for the execution of this project for the entire duration of the project.

The Site Superintendent: this individual shall be the primary person that will manage the site on a daily basis. This individual will be on the jobsite every day for the entire duration of the project.

### ROOFING MANUFACTURER

Name of Primary Roofing Manufacturer \_\_\_\_\_

Product Name: \_\_\_\_\_

Type of System Being Installed:

<input type="checkbox"/> Built Up	<input type="checkbox"/> Metal
<input type="checkbox"/> Modified Bitumen	<input type="checkbox"/> Shingle
<input type="checkbox"/> Single Ply	<input type="checkbox"/> Other _____
<input type="checkbox"/> Spray Foam	

## SUBMITTAL FORM B – PROJECT APPROACH

SPECIAL REQUIREMENTS: This Submittal Form must not contain any names that can be used to identify who the Offeror is, must not identify the Offerors cost/fee, and must not exceed the page limits specified in the RFP (reference RFP Sections 4.5).

## SUBMITTAL FORM C – NARRATIVE PROPOSAL

<<Insert Requirements/Format>>

# SUBMITTAL FORM E – PAST PERFORMANCE QUALIFICATIONS

The Owner has requested Past Performance Qualifications on Roofing Contractors and Manufacturers. The companies listed below have identified you as a client for which they have previously installed a roof for. We would appreciate you taking the time to complete this survey.

## PART A – VENDOR / PERSONNEL REQUESTING CLIENT FEEDBACK

Name of the Roofing Contractor: \_\_\_\_\_  
Name of the Roofing Manufacturer: \_\_\_\_\_

## PART B – PROJECT BACKGROUND

Client Name: \_\_\_\_\_ Roof Area (SF): \_\_\_\_\_  
Project Name: \_\_\_\_\_ Date Installed: \_\_\_\_\_  
Roof Location: (City & State) \_\_\_\_\_ Cost (\$): \_\_\_\_\_  
Type of System: ☐ Built Up ☐ Mod Bit ☐ Single Ply ☐ Spray Foam ☐ Metal ☐ Shingle ☐ Other \_\_\_\_\_

## PART C – REFERENCE EVALUATION

Please evaluate if your roof currently leaks and 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 dissatisfied**). Consider all aspects of the vendor and their key personnel performance, such as: ability to manage project cost, ability to manage schedule, quality of workmanship, close out process, ability to communicate and document risks, and ability to follow the user's rules, regulations, and requirements.

CRITERIA	UNIT	RATING
Has the roof ever leaked since it was installed?	(Yes / No)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does the roof currently leak?	(Yes / No)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Overall Customer Satisfaction – Roofing Contractor/Installer	(1-10)	
Overall Customer Satisfaction – Roofing Manufacturer/Product/System	(1-10)	

Please provide any additional information regarding the roofing contractor/installer and the roofing product or system (consider: response time to leaks, would you purchase the system again, general recommendations, anything you would do differently, the greatest risk/problems/challenges that were encountered, etc.)

# SUBMITTAL FORM F – ROOFING WARRANTY ANALYSIS

## MANUFACTURER INFORMATION

Name of Manufacturer:

Name of Product/System:

Type of System:

☐ Built Up ☐ Mod Bit ☐ Single Ply ☐ Spray Foam ☐ Metal ☐ Shingle ☐ Other

Warranty Period (Years):

## REQUIRED ATTACHMENTS

The following documents must be attached to this Submittal Form. Please ensure that the documents are clear and legible.

- ☐ A copy of the Manufacturer's Warranty (that will be issued on this Project). Please ensure that the Warranty states the duration of the warranty period.
- ☐ A copy of the Manufacturer's Warranty Exclusions

## WARRANTY EXCLUSIONS

Please identify if the Warranty (that is being proposed) contains any of the following exclusions:

NO	EXCLUSION	RESPONSE
1	Requirements for the owner to use reasonable care	<input type="checkbox"/> Yes <input type="checkbox"/> No
2	Requirements for the owner to provide routine inspections or maintenance	<input type="checkbox"/> Yes <input type="checkbox"/> No
3	Requirements for the owner to pay for roof inspections	<input type="checkbox"/> Yes <input type="checkbox"/> No
4	Abnormal use or unusual occurrences	<input type="checkbox"/> Yes <input type="checkbox"/> No
5	Restrictions based on traffic on the roof	<input type="checkbox"/> Yes <input type="checkbox"/> No
6	Ponding water, standing water, or requirements for positive drainage	<input type="checkbox"/> Yes <input type="checkbox"/> No
7	Damage caused by animals, insects, pests, etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No
8	Damages caused by chemicals, solvents, liquids, acids, etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No
9	Changes in building use or purpose	<input type="checkbox"/> Yes <input type="checkbox"/> No



# SUBMITTAL FORM H – COST PROPOSAL

## SECTION 1 – PROJECT COST

The Offeror is required to provide a clear breakdown as indicated in this Submittal Form. The Offeror's Total Project Cost shall include the cost for everything that is necessary to meet the intent of the Owner as described in this RFP, including, but not limited to: materials, products, labor, subcontractors, suppliers, equipment, applicable taxes, fees, overhead, profits, travel, direct and indirect costs, etc. Pricing shall include complete shipment and delivery of all equipment to the project site unless otherwise stated. All Federal, State, Provincial and Local taxes, fees, assessments, and tariffs and the cost of all required insurance are included in this Proposal Cost. If selected to perform this work, the Offeror agrees, as a condition of this proposal, to submit evidence satisfactory to the Owner of our financial ability to perform all work covered by this proposal.

ITEM	DESCRIPTION	COST
1	Design Activities	\$
2	Tear-off Activities	\$
3	Roofing System/Product Costs	\$
4	Flashing Costs	\$
5	Insulation Costs	\$
6	Installation Activities	\$
7	Other	\$
Total Project Cost:		\$

## SECTION 2 – ALTERNATIVES

The Offeror shall provide estimated costs for the following alternatives (these alternatives and costs must not be included in the total base proposal cost in Section 1 of this Submittal Form)

ITEM	DESCRIPTION	COST
1	Description 1	\$
2	Description 2	\$
3	Description 3	\$
		\$
Total Project Cost:		\$



## SECTION 7

### ATTACHMENTS & EXHIBITS

Exhibit 1	Agreement / Contract
Exhibit 2	Specs, Drawings, etc.
Exhibit 3	<<Insert as needed>>

# Summary

# Putting RFP Excellence Into Practice

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