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center4procurement.org/toal

Developing a High-Performing Statement of Work and Current Conditions

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Agenda

- **Overview**
- **Workshop**
- **Content & Structure of a High-Performing SOW**
- **The Importance of Current Conditions**
- **Summary & SOW Assessment Handout**

Center for Procurement Excellence (CPE)

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

MISSION

Improve effectiveness of RFPs for public and private organizations worldwide

GOAL

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

RESOURCES

Professional Development Training, RFP Templates, Advocacy



RFP

Request for Proposal



Information Technology (IT)
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

*What is the
Goal
of the RFP?*

Goals of the RFP?

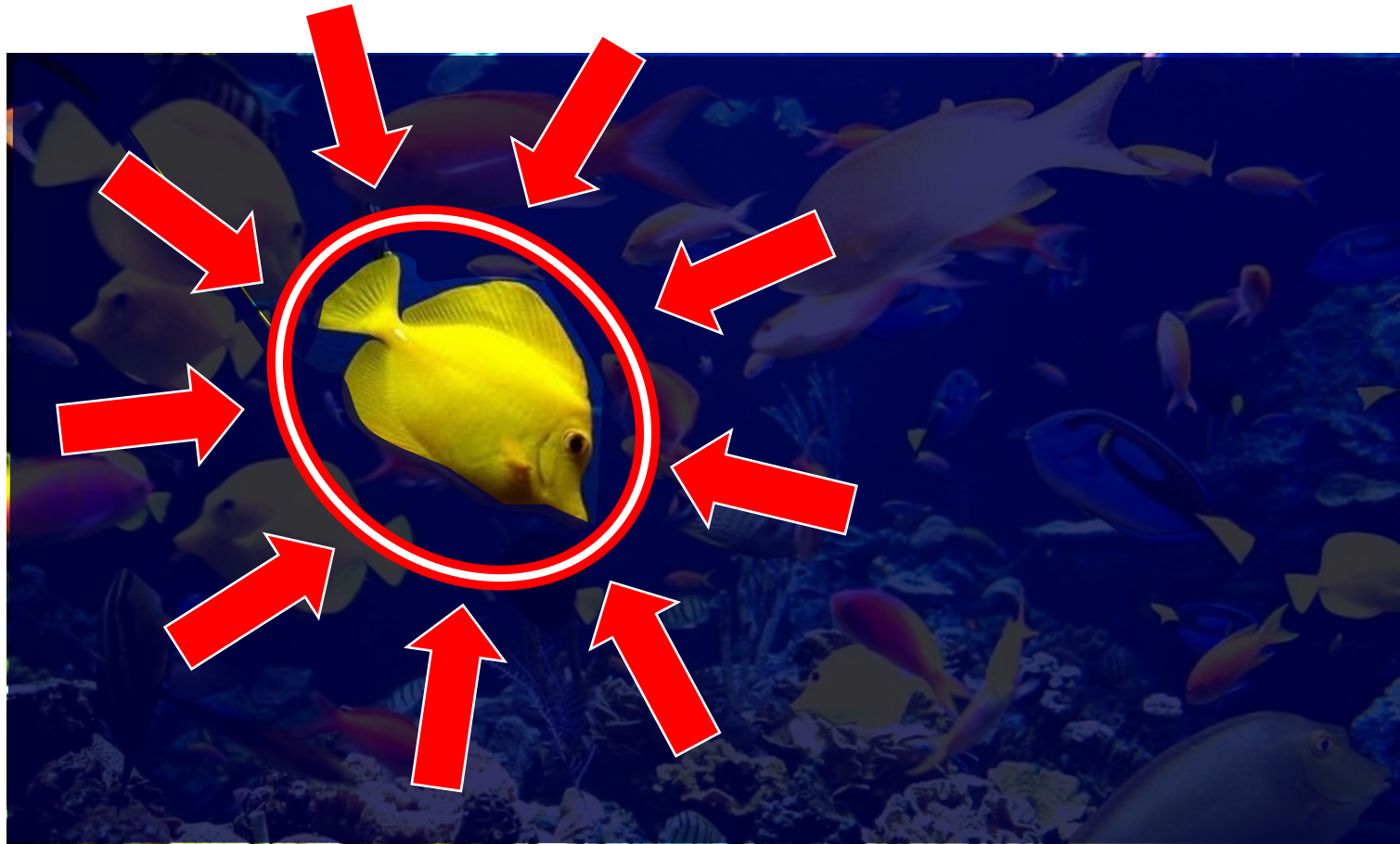
- **Make it difficult to determine your needs?**
- **Confuse vendors?**
- **Frustrate vendors?**
- **Increase the odds of missing a requirement?**



Always Remember...Vendors Have Options!



You Want To Look More Attractive Than All Other Current Owners!!!



If You Look Dangerous....



So how do we attract more
High-Performing Vendors?

**Starts With
Your
Solicitation!**

RFP

Request for Proposal



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

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY



RFP vs. SOW: How are they Related?

RFP

Request for Proposal



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RFP vs. SOW: How are they Related?

RFP

Request for Proposal



Information Technology (IT)
Software Implementation Template

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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

2 Current Conditions

3 Proposal Requirements

4 Evaluation Procedures

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What the Client
is Purchasing



Organizing a High-Performing RFP

RFP

Request for Proposal



Information Technology (IT)
Software Implementation Template

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1 Statement of Work

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7 Attachments & Exhibits

What the Client
is Purchasing

How the Client will
Evaluate and Select
the vendor



DEFINITION: Statement of Work (SOW)

- The Statement of Work (SOW) is an essential part of any solicitation.
- Describes what you are looking to purchase, acquire, or achieve.

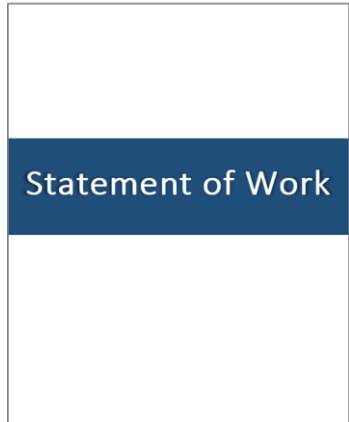
4 Major “Steps” to Contract

Contract



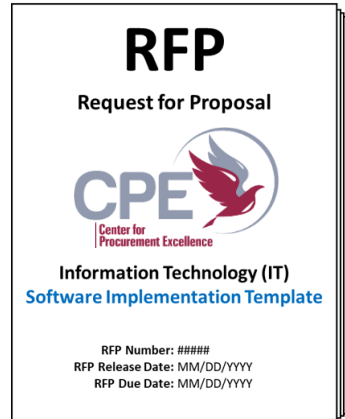
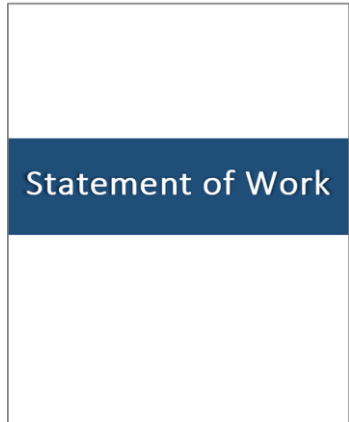
1) Define the Project SOW

General Procurement Process



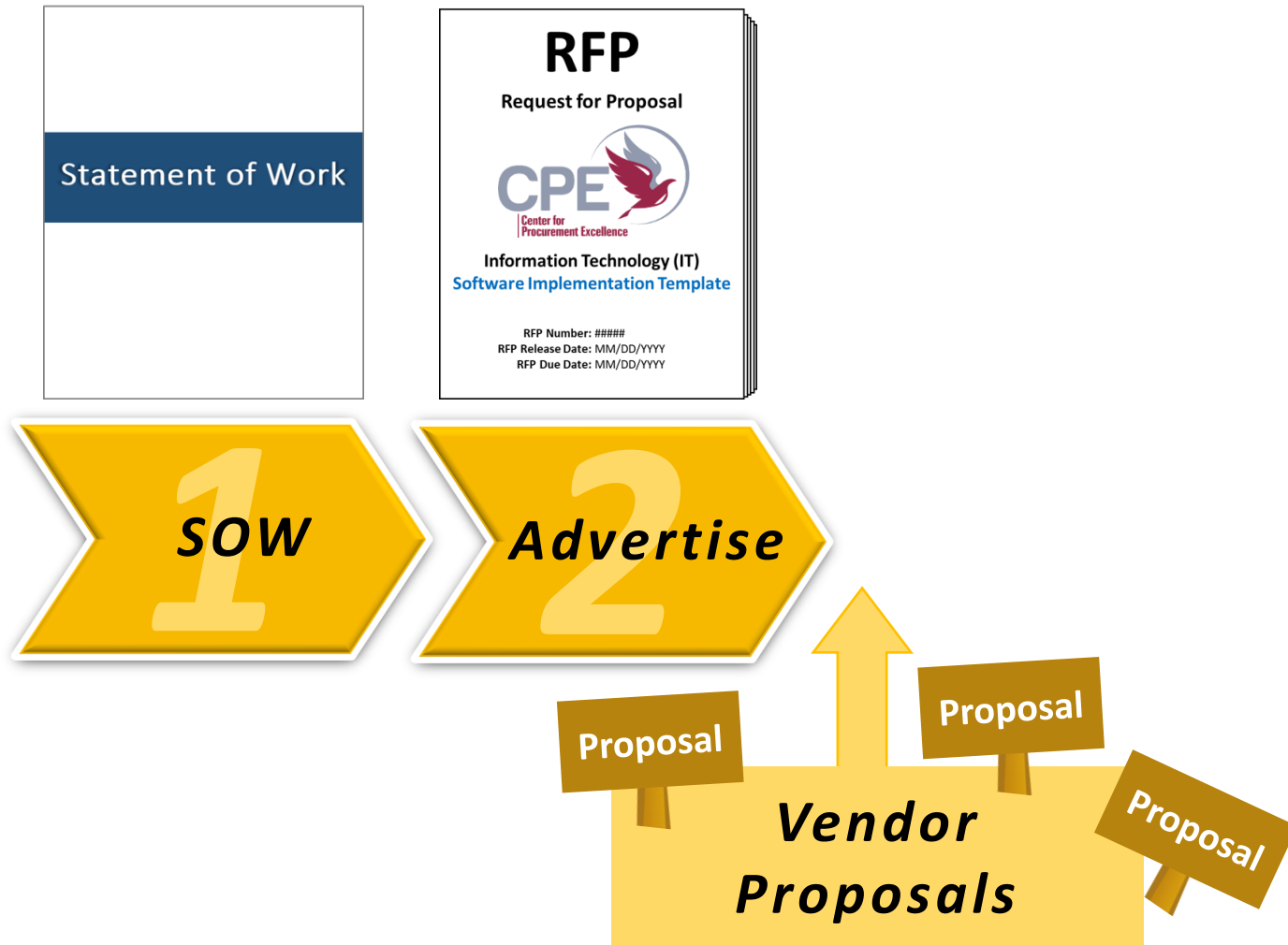
2) Advertise the RFP (and SOW)

General Procurement Process



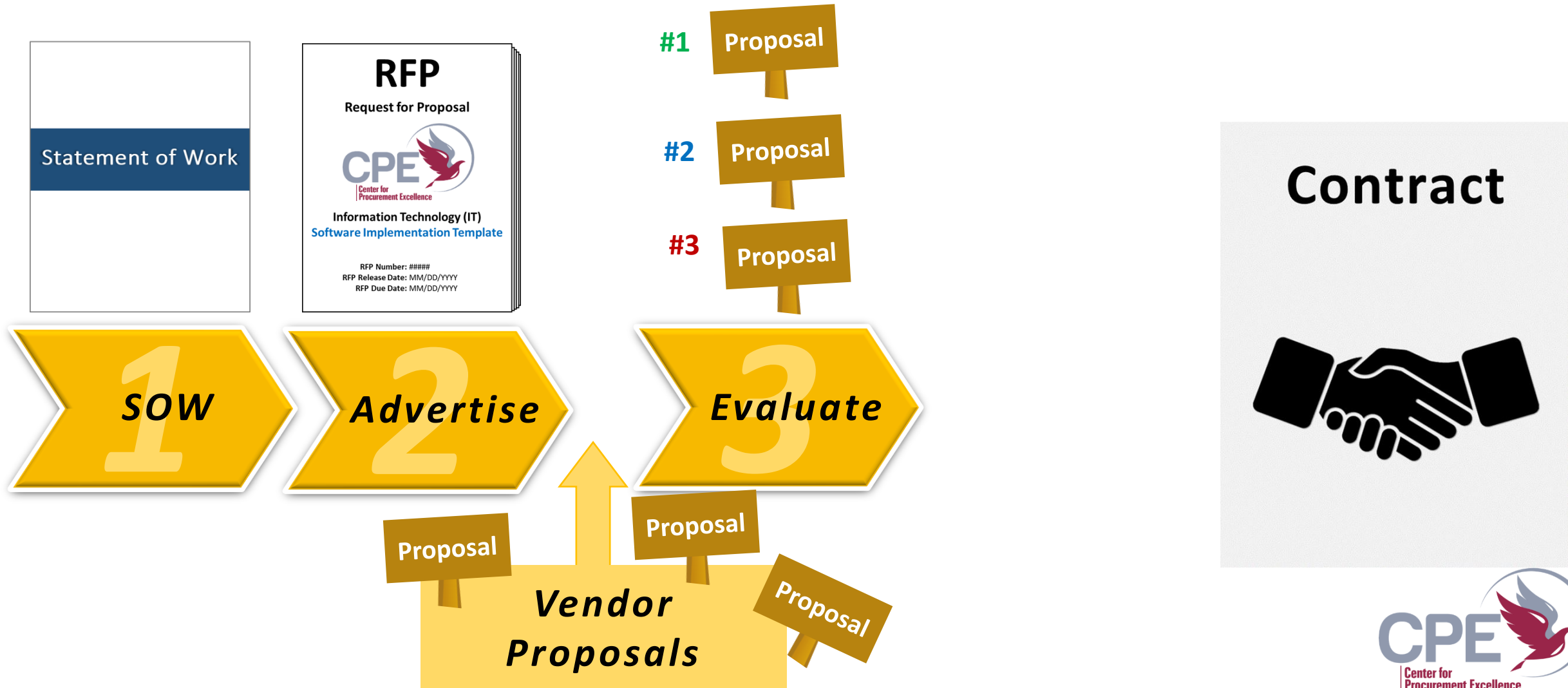
Vendors Respond with Proposals

General Procurement Process



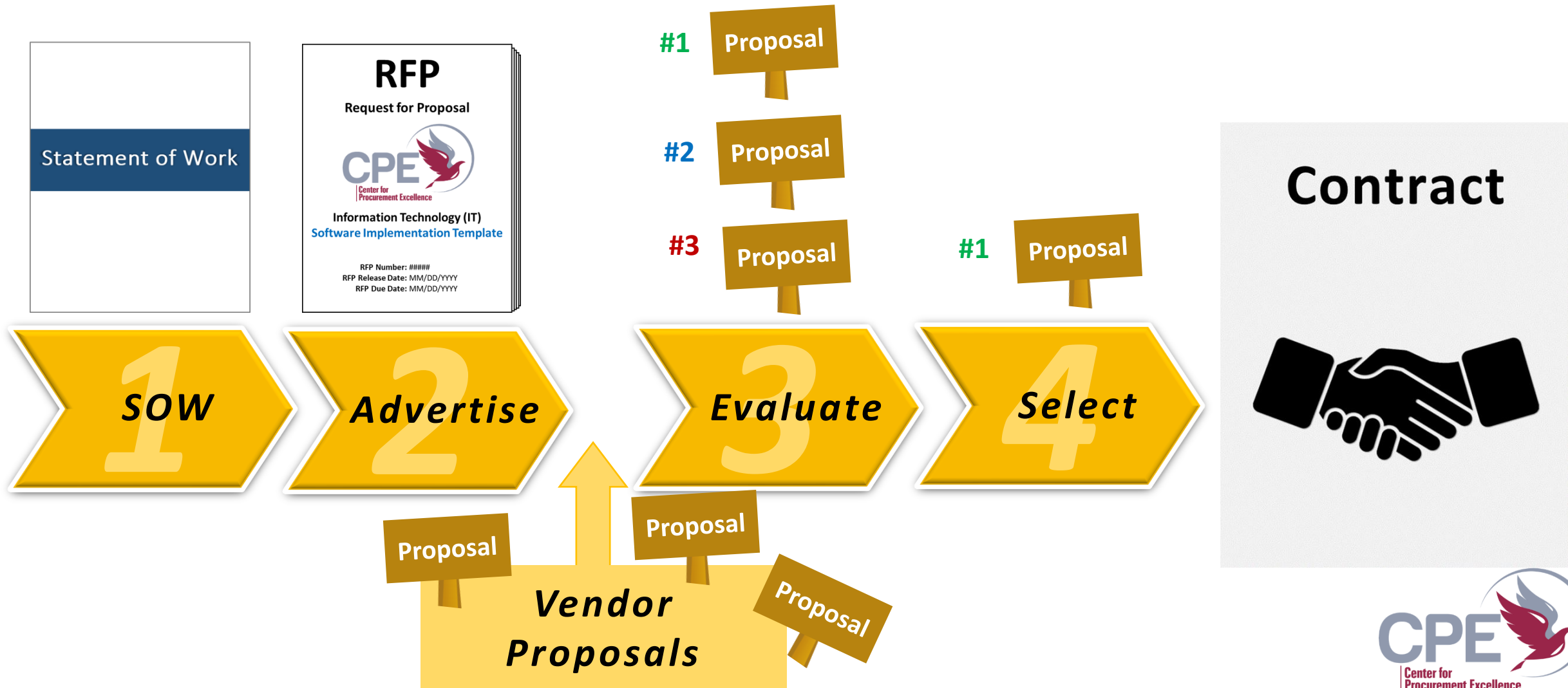
3) Evaluate the Proposals

General Procurement Process



4) Select the Top-Evaluated Vendor(s)

General Procurement Process



ITB
RFQ
SOI
RFP
SOQ
RFT
IFB
RFSQ

Solicitation

Contents

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

*Whatever
Type of
Solicitation
You Issue...
... A High-
Performing
SOW is
Crucial!*

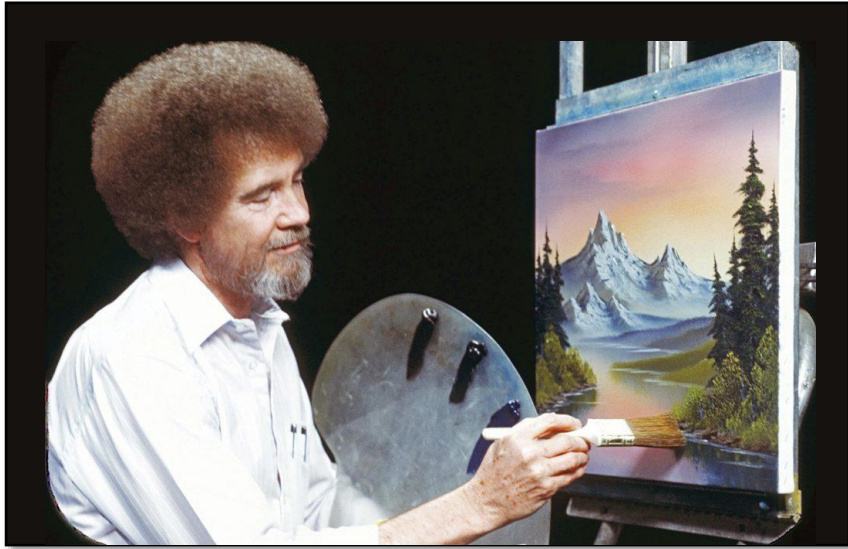
Terminology

All are Included...

- **Statement of Work (SOW)**
- **Scope of Work (SOW)**
- **Specifications or Minimum Specifications**
- **Requirements or Minimum Requirements**
 - Business Requirements
 - Technical Requirements
 - Functional Requirements
- **Minimum Qualifications**

**SOW =
What you are
Hiring the
Vendor to do**

The Goal of the SOW



- Paint the picture of what success looks like
- Describe what it will take to make you 100% satisfied (what are the outcomes & achievements)
- A good SOW assures that all of the vendors propose a proper solution (that meets your needs)

A hand holding a car key with a blue overlay. The background is a blurred image of a car's interior, showing the steering wheel and dashboard. The text is overlaid on the image.

Workshop

Purchasing a Vehicle

Pull up the "SOW Workshop"

SOW Workshop Form

TEAM MEMBERS:

VEHICLES:

	#	MAKE	PRICE		#	MAKE	PRICE
SEDAN	1	Kia	\$14,000	TRUCK	13	Toyota	\$18,000
	2	Honda	\$16,000		14	Dodge	\$22,000
	3	Ford	\$21,000		15	Ford	\$15,000
	4	Chevy	\$23,000		16	Chevy	\$28,000
SUV	5	Honda	\$19,000	VAN	17	Kia	\$22,000
	6	Toyota	\$29,000		18	Dodge	\$24,000
	7	Dodge	\$29,000		19	Chrysler	\$25,000
	8	Chevy	\$38,000		20	Honda	\$35,000
LUXURY	9	Audi	\$35,000				
	10	BMW	\$60,000				
	11	Porsche	\$105,000				
	12	Ferrari	\$125,000				

FEEDBACK:

	SCENARIO #1	SCENARIO #2	SCENARIO #3	SCENARIO #4	SCENARIO #5	SCENARIO #6	SCENARIO #7
Vehicles Selected (#):							
Level of Satisfaction with requirements (1-10) <small>(10 = Extremely Satisfied & 1 = Extremely Dissatisfied):</small>							

SCENARIO #8

1 _____

2 _____

3 _____

4 _____

5 _____

CATEGORY	MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP	
				W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE			
SEDAN	1	Kia	Used	59,000		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4			<input checked="" type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2				5 Stars	\$105,000
	12	Ferrari	New	2			<input checked="" type="checkbox"/>		2				5 Stars	\$125,000
TRUCK	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5			<input checked="" type="checkbox"/>	5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$28,000
VAN	17	Kia	Used	47,000	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

Summary of Objectives

- You will play the role of a **salesperson** for a Car Dealership.
- Your task will be to identify the **'best' vehicle** for a customer based on your current inventory of vehicles.



Workshop Form

	SCENARIO #1	SCENARIO #2	SCENARIO #3	SCENARIO #4	SCENARIO #5	SCENARIO #6	SCENARIO #7
Vehicles Selected (#):							
Level of Satisfaction with requirements (1-10) (10 = Extremely Satisfied & 1 = Extremely Dissatisfied):							

SCENARIO #8

- 1
- 2
- 3
- 4
- 5

Evaluation Form

TEAM MEMBERS:

VEHICLES:

	#	Make	Price		#	Make	Price
SEDAN	1	Kia	\$14,000	TRUCK	13	Toyota	\$18,000
	2	Honda	\$16,000		14	Dodge	\$22,000
	3	Ford	\$21,000		15	Ford	\$15,000
	4	Chevy	\$23,000		16	Chevy	\$28,000
SUV	5	Honda	\$19,000	VAN	17	Kia	\$22,000
	6	Toyota	\$29,000		18	Dodge	\$24,000
	7	Dodge	\$29,000		19	Chrysler	\$25,000
	8	Chevy	\$38,000		20	Honda	\$35,000
LUXURY	9	Audi	\$35,000				
	10	BMW	\$60,000				
	11	Porsche	\$105,000				
	12	Ferrari	\$125,000				

FEEDBACK:

	SCENARIO #1	SCENARIO #2	SCENARIO #3	SCENARIO #4	SCENARIO #5	SCENARIO #6	SCENARIO #7
Vehicles Selected (#):							
Level of Satisfaction with requirements (1-10) (10 = Extremely Satisfied & 1 = Extremely Dissatisfied):							

SCENARIO #8

- 1
- 2
- 3
- 4
- 5

SCENARIO #1

- I need to purchase a vehicle.
- What is the best deal that you can offer me?
- I will be back at the end of the week to purchase the vehicle!

OBJECTIVE: Identify the vehicle you selected for this customer

Scenario #1:

- I need to purchase a vehicle.
- What is the best deal that you can offer me?
- I will be back at the end of the week to purchase the vehicle?

Vehicles Selected (#):

Level of satisfaction with stated requirements (1-10)

(10 = Extremely Satisfied & 1 = Extremely Dissatisfied):

SCENARIO #1	

CATEGORY	MAKE	TYPE	MILEAGE	COLOR					SEATS	OPTIONS				SAFETY	MSRP
				W	B	R	S			BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE			
SEDAN	1	Kia	Used	55,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4					5 Stars	\$14,000
	2	Honda	Used	60,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4					5 Stars	\$16,000
	3	Ford	New	11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4				<input type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4	<input type="checkbox"/>				5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		5 Stars	\$19,000
	6	Toyota	New	8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	<input type="checkbox"/>		<input type="checkbox"/>		5 Stars	\$29,000
	7	Dodge	New	12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		5 Stars	\$29,000
LUXURY	8	Chevy	New	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	<input type="checkbox"/>		<input type="checkbox"/>		5 Stars	\$38,000
	9	Audi	New	11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		5 Stars	\$35,000
	10	BMW	New	12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4	<input type="checkbox"/>		<input type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2					5 Stars	\$105,000
TRUCK	12	Ferrari	New	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2					5 Stars	\$125,000
	13	Toyota	Used	74,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	<input type="checkbox"/>		<input type="checkbox"/>		5 Stars	\$18,000
	14	Dodge	New	11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	<input type="checkbox"/>		<input type="checkbox"/>		5 Stars	\$22,000
	15	Ford	Used	98,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5			<input type="checkbox"/>		5 Stars	\$15,000
VAN	16	Chevy	New	24	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	<input type="checkbox"/>		<input type="checkbox"/>		5 Stars	\$28,000
	17	Kia	Used	47,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		5 Stars	\$22,000
	18	Dodge	New	23	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	<input type="checkbox"/>		<input type="checkbox"/>		5 Stars	\$24,000
	19	Chrysler	New	17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		5 Stars	\$25,000
	20	Honda	New	19	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		5 Stars	\$35,000

POLL RESULTS



Most Common Feedback...

- *What does “best-deal” even mean?*
- *Open-ended SOW = free for fall, price-gauging, etc.*
- *Some teams will pick most expensive option / Others pick the cheapest*
- *Many teams are frustrated and annoyed and didn't really spend much effort?*

Clarify Assumptions...

- The Salesperson can only offer **1 vehicle**
(**cannot** offer multiple options)
- The Salesperson really wants to make the deal
 - (**would rather not 'lose' the deal** or see client purchase a vehicle from the dealer across the street)

SCENARIO #2

- Here are my expectations:
 - Need a new vehicle, not used
 - Need 5-star safety rating
 - Would like it to be black or silver
 - Would like Back-Up Camera
 - Probably an SUV (3 kids plus 2 adults)

CATEGORY	MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP	
				W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE			
SEDAN	1	Kia	Used	59,000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4			<input checked="" type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2				5 Stars	\$105,000
12	Ferrari	New	2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2					5 Stars	\$125,000
TRUCK	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5			<input checked="" type="checkbox"/>	5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$28,000
VAN	17	Kia	Used	47,000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

SCENARIO #1	SCENARIO #2
Vehicles Selected (#):	
Level of satisfaction with stated requirements (1-10) (10 = Extremely Satisfied & 1 = Extremely Dissatisfied):	

POLL RESULTS



Feedback...

- **Most Common:**
 - SUV Dodge @ \$29k
 - SUV Chevy @ \$38k
 - VAN: Dodge @ \$24k
 - VAN Chrysler @ \$25k
- Which cost option **should** the dealer pick (if you can only pick one)?
- It was clearly helpful to have **more** information?
- What was **missing**?

Feedback...

- **Be clear on your expectations:**

- Need a new vehicle, not used

- Need 5-star safety rating

- Would like it to be black or silver

- Would like Back-Up Camera

- Probably an SUV (3 kids plus 2 adults)

Mandatory Requirements?

Desired Items?

SCENARIO #3

- Here are some of my expectations:

- Need a new vehicle, not used
- Need 5-star safety rating
- Do not want a red-colored vehicle
- Would like Back-Up Camera
- Need at least 5 seats (3 kids plus 2 adults)
- Must be able to go/take it camping in the forest
- My maximum budget is \$27,000

CATEGORY	MAKE	TYPE	MILEAGE	COLOR			SEATS	OPTIONS			SAFETY	MSRP	
				W	B	R		S	BACKUP CAMERA	REMOVABLE SEATS			TOW PACKAGE
SEDAN	1	Kia	Used	59,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$19,000
	6	Toyota	New	8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>			5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2				5 Stars	\$105,000
	12	Ferrari	New	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2				5 Stars	\$125,000
TRUCK	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>			5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>			5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5				5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>			5 Stars	\$28,000
VAN	17	Kia	Used	47,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

SCENARIO #1	SCENARIO #2	SCENARIO #3
Vehicles Selected (#):		
Level of satisfaction with stated requirements (1-10) (10 = Extremely Satisfied & 1 = Extremely Dissatisfied):		

POLL RESULTS



Discussion

- Was it helpful to have the budget?
- Was it helpful to know the purpose/goals/objectives of the vehicle?

Need a new vehicle, not used
Need 5-star safety rating
Do not want a red-colored vehicle
Would like Back-Up Camera
Need at least 5 seats (3 kids plus 2 adults)
Must be able to go/take it camping in the forest
My maximum budget is \$27,000

SCENARIO #4

- Here are some of my expectations:

- Prefer a new vehicle, not used
- Would like a 5-star safety rating
- Would prefer a red vehicle
- Would prefer a sedan or SUV
- I plan to use the vehicle to take my small boat to the lake on occasion
- I generally only have 1-2 people in the vehicle, but may have a few more when going to the lake
- Do not want a van
- A maximum budget of \$75,000

CATEGORY	MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP	
				W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE			
SEDAN	1	Kia	Used	59,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
LUXURY	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$105,000
TRUCK	12	Ferrari	New	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5 Stars	\$125,000
	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
VAN	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$15,000
	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$28,000
	17	Kia	Used	47,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$24,000
VAN	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

W = White | B = Black | R = Red | S = Silver

POLL RESULTS



Discussion...

- **Was it helpful to know the purpose/goals/objectives of the vehicle?**
- **Is it OK to release your budget when you have more money than you need?**
- **Will you always get price-gauged?**

SCENARIO #5

- **Here are some of my expectations:**
 - Need a truck
 - Must be a new vehicle (not used)
 - I will be using this to tow my construction trailer
 - Must have back-up camera
 - Would prefer a lighter color (white or silver)
 - I have a maximum budget of \$20,000

POLL RESULTS



Discussion

- **Does client have enough money to meet all expectations?**
- **What are the options?**
- **What would happen if you didn't release the budget?**

SCENARIO #6

- Here are some of my expectations:
 - Must be a Nissan Truck
 - Must have a tow package
 - Must have back-up camera
 - Must be white
 - I have a maximum budget of \$30,000

CATEGORY	MAKE	TYPE	MILEAGE	COLOR				SEATS	OPTIONS			SAFETY	MSRP
				W	B	R	S		BACKUP CAMERA	REMOVABLE SEATS	TOW PACKAGE		
SEDAN	1	Kia	Used	59,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$14,000
	2	Honda	Used	66,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4				5 Stars	\$16,000
	3	Ford	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4			<input checked="" type="checkbox"/>	5 Stars	\$21,000
	4	Chevy	New	13	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>			5 Stars	\$23,000
SUV	5	Honda	Used	39,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$19,000
	6	Toyota	New	8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$29,000
	7	Dodge	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$29,000
	8	Chevy	New	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$38,000
LUXURY	9	Audi	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000
	10	BMW	New	12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		5 Stars	\$60,000
	11	Porsche	New	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2				5 Stars	\$105,000
TRUCK	12	Ferrari	New	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2				5 Stars	\$125,000
	13	Toyota	Used	74,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$18,000
	14	Dodge	New	11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$22,000
	15	Ford	Used	98,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5			<input checked="" type="checkbox"/>	5 Stars	\$15,000
VAN	16	Chevy	New	24	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	5 Stars	\$28,000
	17	Kia	Used	47,000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$22,000
	18	Dodge	New	23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>			5 Stars	\$24,000
	19	Chrysler	New	17	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$25,000
	20	Honda	New	19	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5 Stars	\$35,000

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POLL RESULTS



Discussion

- **Would this be acceptable in Public Procurement?**
- **Cannot specify a product (unless there is clear justification), must allow “or-equal”**

SCENARIO #7

- **I need to purchase a vehicle. I would like you to identify the best deal you can provide for a vehicle? Here are some of my expectations:**

- The vehicle must come with synthetic engine oil
- The vehicle must have windshield wipers
- I was born in May
- I have 3 younger brothers
- My brothers live in the same State
- I work for an IT company
- I would like a new car, not used
- I generally work 40-45 hours per week
- I really like my current vehicle
- I get headaches from the smell of cigarettes
- Do you think I need a tow package
- My house has really cool carpet
- I do not want a red or yellow vehicle
- I have set aside extra funds for the 'right' vehicle
- Vehicle must have a 4-speed automatic or better
- The vehicle should get great MPG
- Vehicle must come with 2 sets of keys
- Vehicle must come with full tank of gas
- I am open to any color vehicle
- I've never been camping
- How do you take a shower in the forest?
- If I get a vehicle, is 5-star better than 4?
- Would like to purchase by end of the week
- Would really like a luxury sedan
- I think SUV's are really cool
- I currently drive a 4-door sedan
- I really like Thai food, but not sushi
- My maximum budget is \$29,000
- The vehicle must have Firestone tires
- The vehicle should have chrome wheels
- Would like the vehicle to have tinted windows
- The vehicle must have great lights for night driving

POLL RESULTS



Discrepancies

- I need to purchase a vehicle. I would like you to identify the best deal you can provide for a vehicle? Here are some of my expectations:

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- I was born in May
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Content & Structure of a High-Performing Statement of Work

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

What the Client
is Purchasing



Organizing a High-Performing RFP

RFP

Request for Proposal



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What the Client
is Purchasing

How the Client will
Evaluate and Select
the vendor



Content & Structure of a High-Performing SOW

Statement of Work

- 1 Overview & Purpose
- 2 Future State
- 3 Itemized Requirements
- 4 Schedule & Budget
- 5 Unique Considerations

Content & Structure of a High-Performing SOW

Statement of Work

- 1 Overview & Purpose**
- 2 Future State
- 3 Itemized Requirements
- 4 Schedule & Budget
- 5 Unique Considerations

Concisely Describe
“What” & “Why”

Content & Structure of a High-Performing SOW

Overview & Purpose

- **Project Overview:** high-level summary that is easily understandable (**1-2 sentences up to 1-2 paragraphs max**)

Content & Structure of a High-Performing SOW

Overview & Purpose

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 - **Avoid technical language, jargon, details, or specifics.**

Content & Structure of a High-Performing SOW

Overview & Purpose

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 - **Avoid technical language, jargon, details, or specifics.**

- **Goals, Objectives & Motivation:** primary business drivers and purpose

Content & Structure of a High-Performing SOW

Overview & Purpose

- **Project Overview:** high-level summary that is easily understandable (**1-2 sentences up to 1-2 paragraphs max**)
 - **Avoid technical language, jargon, details, or specifics.**
- **Goals, Objectives & Motivation:** primary business drivers and purpose
- **Key Measures of Success:** top 3-5 quantifiable metrics (cost, time, quality, functionality)

Key Measures of Success

- **Key Measures of Success:** top 3-5 quantifiable metrics (cost, time, quality, functionality)
- **Difficult for Business Units to do!**
 - They often focus on activities rather than outcomes.
 - Takes intense questioning.

Organizing a High-Performing RFP

RFP

Request for Proposal



Information Technology (IT)
Software Implementation Template

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What the Client
is Purchasing

Overview &
Purpose are right
up front, so must
be easy to find &
understand!



Content & Structure of a High-Performing SOW

Statement of Work

- 1 Overview & Purpose
- 2 Future State**
- 3 Itemized Requirements
- 4 Schedule & Budget
- 5 Unique Considerations

**Departures from
Current Conditions**

Content & Structure of a High-Performing SOW

Future State

- Describe each of the deliverables/services to be provided by the selected vendor for this Statement of work
- Describe the minimum requirements that must be performed to achieve a 100% satisfaction
- Attach exhibits to make this easier to follow (i.e. drawings, specs, pictures, site plans, etc.)

Content & Structure of a High-Performing SOW

Future State

- **Overview:** clear, concise, & easily understandable description
- **Project Deliverables:** tangible outcomes to be produced by vendor
- **Figures, Diagrams, & References:** supporting explanation
- **Transition/Migration:** efforts to bring legacy data forward

Content & Structure of a High-Performing SOW

Statement of Work

- 1 Overview & Purpose
- 2 Future State
- 3 Itemized Requirements**
- 4 Schedule & Budget
- 5 Unique Considerations

**Mandatory & Desired
Items**

Content & Structure of a High-Performing SOW

Itemized Requirements

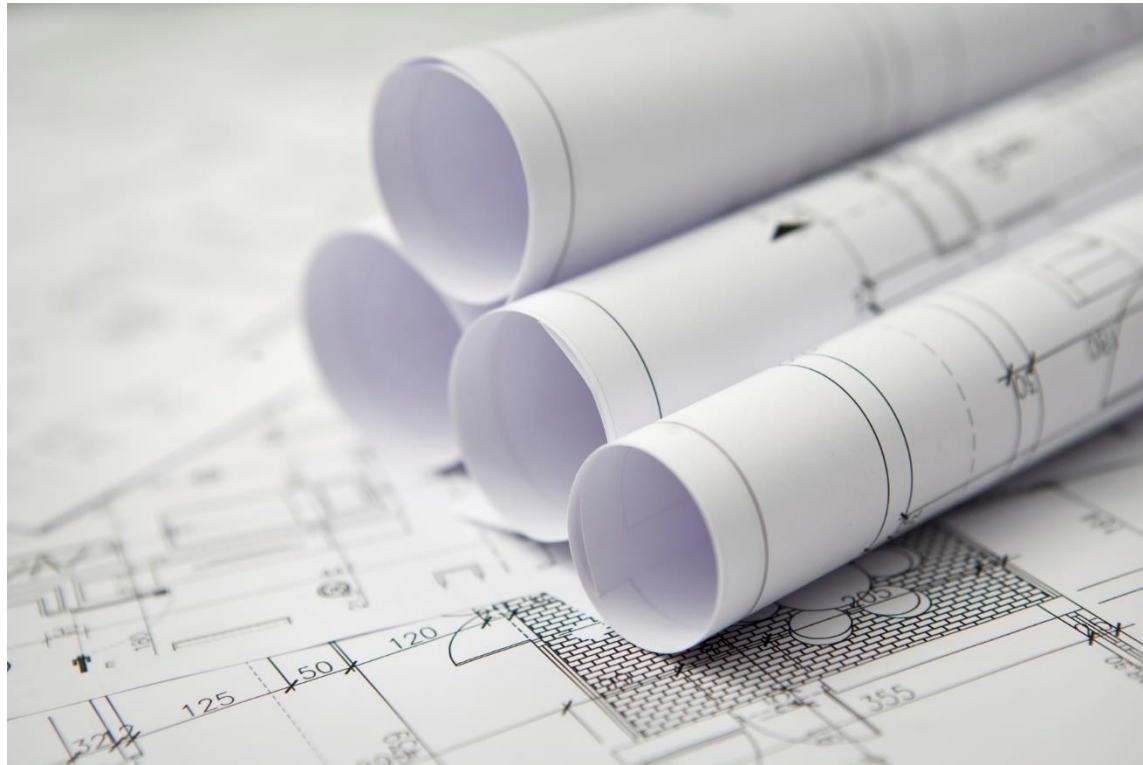
Organization:

- Itemized
- Organized into major categories
- Attach (and reference) Exhibits to make this easier to follow (i.e. drawings, specs, pictures, diagrams, site plans, reference files, etc.)
- Do **NOT** need a written commentary for each requirement

Content & Structure of a High-Performing SOW

Itemized Requirements

- Drawings & Specs (Construction)



- Requirements (IT/Software)

ID Num	Requirement Area	Requirement Subcategory	Requirement Name	Requirement
5402	System and Technical	Workflow	Approval / Denial	System shall provide ability to define multiple approval levels for electronic transactions / documents / business events processing.
5403	System and Technical	Workflow	Approval / Denial	System shall provide ability to restrict processing of electronic transactions / documents / business events until they pass all required approval levels.
5404	System and Technical	Workflow	Approval / Denial	System shall provide ability to set up Approver Groups associated with electronic transaction / document / business event processing.
5405	System and Technical	Workflow	Approval / Denial	System shall provide the ability to define a unique approval process for each user and type of document/business event.
5406	System and Technical	Workflow	Approval / Denial	System shall provide the ability to specify multiple approvers for a document/business event where only one of the approvers listed must approve the document in order to consider the document approved.
5407	System and Technical	Workflow	Audit Trail	System shall provide an audit trail of all adds, changes, and deletes to workflow rules.
5408	System and Technical	Workflow	General	System shall ensure that any transaction, document or business event entered into the on-line system is reviewable prior to its saving / processing / commitment.
5409	System and Technical	Workflow	General	System shall provide the ability to reverse / unwind processed transactions, documents and business events.
5410	System and Technical	Workflow	General	System shall permit a minimum of 10 levels of approval that may be established for each type of electronic document/business event.
5411	System and Technical	Workflow	General	System shall allow all authorized users to see the approval status of a document/business event.
5412	System and Technical	Workflow	General	System shall assure that an employee is removed from and added to the workflow process based on qualifying events (e.g., termination from or appointment to agency, or transfer to another organization entity within the agency).
5413	System and Technical	Workflow	General	If a user modifies an electronic document/business event, the system shall allow approvals to be reprocessed in accordance with business rules.
5414	System and Technical	Workflow	General	System shall provide the ability to search/retrieve documents/records based upon user defined criteria.
5415	System and Technical	Workflow	Notification	System shall include a workflow process, with notification options, for business events and documents.
5416	System and Technical	Workflow	Notification	System shall provide the ability to re-route transaction/document/business event for approval based upon user defined criteria such as dollar thresholds or random selection for statistical sampling purposes.
5417	System and Technical	Workflow	Notification	System electronic document management function shall be integrated with the State's electronic mail system or provide other means to alert "reviewer" of documents awaiting approval.
5418	System and Technical	Workflow	Tracking Document(s)	System shall provide ability to track (e.g., identify, record, inquire, report) the progress of electronic transactions / documents / business events.

Content & Structure of a High-Performing SOW

Itemized Requirements

- **Mandatory Requirements (minimum, pass/fail):**
 - vendors **MUST** meet these or be disqualified.
 - itemized, organized, and categorized
- **Desired Requirements (value proposition):**
 - vendors **NOT disqualified** for missing any individual item.
 - But the Client's goal is to achieve as many as possible.
 - itemized, organized, and categorized

Content & Structure of a High-Performing SOW

Statement of Work

- 1 Overview & Purpose
- 2 Future State
- 3 Itemized Requirements
- 4 Schedule & Budget**
- 5 Unique Considerations

**Time & Financial
Constraints**

Should we share the budget?

YES

Content & Structure of a High-Performing SOW

Schedule & Budget

- **Schedule:** clear & transparent identification of timing needs and constraints
- **Budget:** clear & transparent identification of financial needs and constraints

Content & Structure of a High-Performing SOW

Schedule & Budget

- The Budget is crucial (one of the most important SOW elements)
- Clarifies your technical Statement (what you can afford)
- Clearly define any financial constraints or expectations that you have (**not ranges or “fuzzy” information → don’t cause confusion!**)
- Be direct, such as:
 - The construction budget for this Project is \$150,000
 - The estimated spend for this Project is \$2 Million
 - The project budget is \$3,000,000 over 5 years, of which \$500,000 is allocated for implementation and \$500,000 for annual subscription/support.
- (same for Schedule expectations, constraints, critical dates, phasing, etc.)

Content & Structure of a High-Performing SOW

Statement of Work

- 1 Overview & Purpose
- 2 Future State
- 3 Itemized Requirements
- 4 Schedule & Budget
- 5 Unique Considerations**

**Supplemental
Information**

Content & Structure of a High-Performing SOW

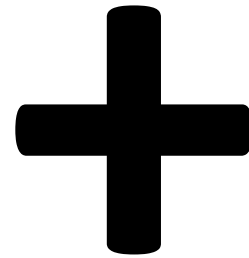
Unique Considerations

- **Unique:** what may be unusual in your environment?
(vs. the vendor's other clients)
- **Unknowns & Assumptions:** list any conditions that are unknown or assumed
- **Attachments & Exhibits:** pertinent supplemental information

The Importance of Current Conditions

Content & Structure of a High-Performing SOW

Statement of Work



Current Conditions

Content & Structure of a High-Performing SOW

Current Conditions

- 1 Overview & Background
- 2 Volumes & Quantities
- 3 Pain Points
- 4 Strengths
- 5 Figures, Diagrams, & References

Current Conditions



- Easiest to document
- Often skipped, ignored, missed
- **Most common request from vendors!!!**

Painting-The-Picture (Statement of Work)

We spend a lot of time focusing on the SOW...

- What success looks like
- What will make you happy at the end of the contract
- What you want to look like
- What you want to achieve



Painting-The-Picture (Current Conditions)

...But we forget to describe what we look like right now



Do Your Current Conditions Really Matter?



Importance of Current Conditions

- Allows the vendors to understand the impact of the change
- Allows the vendor to confirm if SOW is achievable
- Allows the vendor to identify & address challenges
- Allows the vendor to verify the accuracy of your SOW



Current Conditions
Can Allow An Expert vendor To
Address Your Needs

Balancing Act:

Too Open-Ended

vs.

Overly Prescriptive

Public Sector Agency

- Full Technical Specification: “Pls dig a hol”



Set a Benchmark to Propose to!!!!

- Ensure proposals are apples-to-apples (**as much as possible**)
- This is the answer to...
“How do I know if I am too Open-Ended?”
- *If you’ve established a solid benchmark to bid to...*
- *... you have probably provided “enough” SOW info to avoid being open-ended.*

Impact of Open-Ended or Unclear SOW

- Open to interpretation
 - Encourages the minimum
 - Less consistency in pricing (*wider range in cost proposals*)
 - Less competitive pricing (*increased contingency*)
 - Discourages vendors from submitting
- **Brings Risk to the Project!**

Impact of a Poor SOW

Perceptions of Owner SOWs

- **Unclear**
- **Information is missing**
- **Overly prescriptive**
- **Unrealistic**
- **Discourages innovation**
- **The owner is “fishing”**
- **Misunderstands Needs**
- *Procurement is Not Fair*



Impact

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

What is a **High Performing SOW**?

Core Objective: What would a **High-Performing Vendor** need (or want) to know?

ALWAYS question whether the SOW....

- Allows vendors to provide the **best price**?
- Gives vendors **information to plan** their approach?
- Enables vendors to **minimize contingency**?
- Prevents vendors from **walking away**?

Foundations of a High-Performing SOW

- **Apples-to-Apples:** clear & reasonable proposal benchmark
- **Current Conditions:** align expectations on the starting point
- **Realistic:** understand the norms of industry structure
- **Clear, Concise, Complete:** comprehensively describe needs
- **Not Perfect:** High-Performing does not mean Flawless

Goal:
Become a
“Client of Choice”

What is a Client of Choice?

- Vendors want to propose on your project...
 - With their **best people**
 - In a **thoughtful** manner
 - With their most **competitive pricing**
- Internal Clients see RFPs as a Value-Creator...
 - Bring **innovation**
 - Identify the **best approach**
 - Bring **solutions** to minimize risk in execution

Because you are fast, efficient, organized, and professional!

Take-Aways

Free Webinar Series

3rd Thursdays every month

@ 12pm Central

15-min Teaching Moment

(learn a new tip, trick, or tool)

30-min Virtual Peer Group

(network with professionals)

Office Hours

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



Previous Recordings Available Online!

How Do You Ask For
(& Evaluate) Cost Proposals
In Software RFPs?

April 15, 2021



Simpliar's Evaluation
Criteria to Minimize
Budget Risk

May 20, 2021



Current State of Practice
In Software RFPs

June 17, 2021



How to do Market
Research More
Effectively

July 15, 2021



"Don't Worry, the
Contract Will
Save Us"

August 19, 2021



The Value of
Debriefings

September 16, 2021



Handling Large IT
Hardware Buys
With Different Scope Packages

October 21, 2021



Vendor of
Record Programs

November 18, 2021



7 Most Deadly
Marketing Phrases

December 16, 2021



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

January 20, 2022



Best Practices for
Evaluator Training

February 17, 2022



Got RFP Soft Skills?

March 17, 2022



center4procurement.org

19

October

← Later this month!



 Add to Calendar


Highly Qualified = More Expensive?

Do highly qualified proposals automatically come with a hefty price tag? Let's review a study which correlated cost vs. qualifications across more than 1,850 proposals.

16

November



 Add to Calendar

The Love/Hate Relationship With RFPs: Feedback from Procurement Professionals

In this webinar, we delve into procurement professionals' real experiences with the Request for Proposal (RFP) process, discussing aspects they love, hate, and find perplexing.

21

December



 Add to Calendar

BAFO - what's in a name?

The term Best-And-Final-Offer (BAFO) means something different at nearly every buyer organization. Let's dissect the term, discuss the most common procedures, and share tips for success. And, most importantly, let's consider how our vendors feel about the BAFO process!

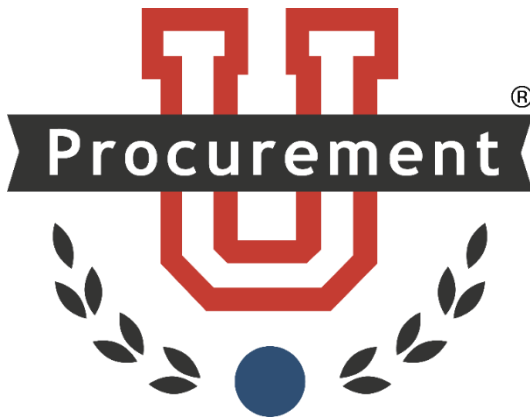


Upcoming Topics!

Register at: center4procurement.org/rfp-doctor



FREE Online Course!



Better RFPs = Better Projects

- Session #1 = Organizing a High-Performing RFP
- Session #2 = Effective Statements of Work (SOWs)
- Session #3 = Evaluation Best Practices & RFP Admin
- Session #4 = RFP Ethics & Vendor Debriefings

Register via NASPO's Procurement U

- Log on to the Procurement U Learning Management System (LMS) to register, access the course and materials.
 - www.naspo.org/procurement-u/
- Open to all (even non-members of NASPO)
- Limited to first 100 participants.



Key Learning Points



- 1. A quality scope of work helps the industry put together a better proposal**
- 2. It doesn't need to be perfect... but can't be terrible!**
- 3. Long-term payoffs are significant!**



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