

# RFPs as Part of Procurement Excellence

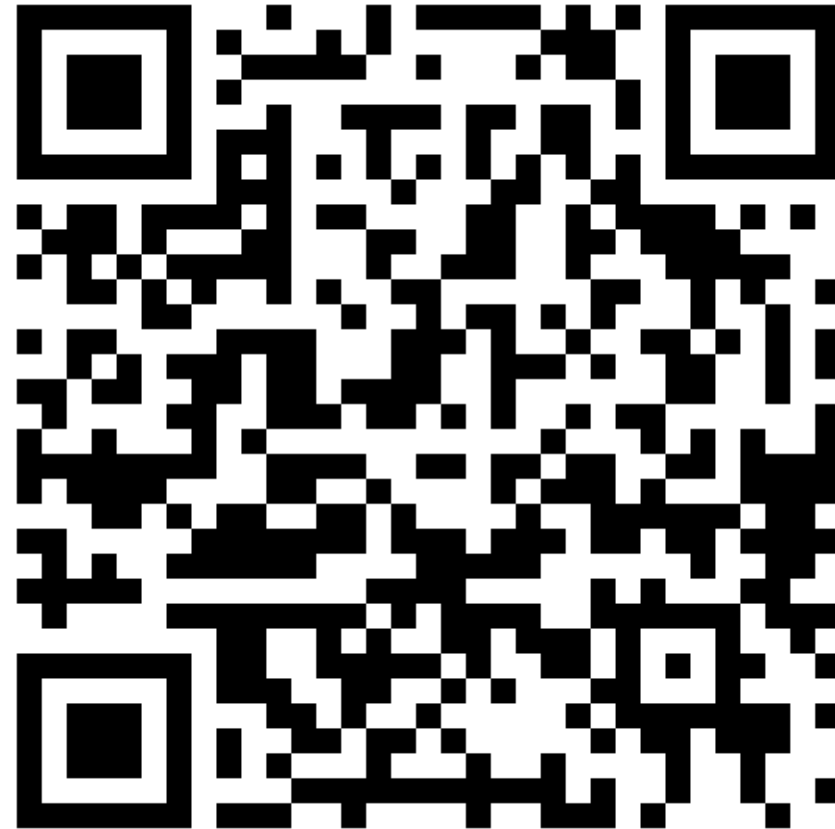


**Jake Smithwick, PhD, MPA**  
**Director of Education**

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# Download Today's Slides & Resources

[center4procurement.org/dfw-nigp/](https://center4procurement.org/dfw-nigp/)



20+ Years | 150+ Owners

3,000+ Projects | \$15+ Billion Procured

## Information Technology

Networking  
Data centers  
Hardware  
COTS software  
ERP systems

Help desk services  
eProcurement

## Facility Management

maintenance  
landscaping  
security service  
building systems  
industrial moving  
waste management  
energy management

custodial  
conveyance  
pest control

## Health Insurance/ Medical Services

## Manufacturing

## Business / Municipal / University Services

dining  
multi-media rights  
fitness equipment  
online education  
document management  
property management  
audiovisual  
communications systems  
emergency response systems  
laundry

retirement fund  
material recycling  
bookstores  
furniture

## Construction / Design / Engineering

Infrastructure	Renovation	DBB
Municipal	Repair	CMAR
Laboratory	Maintenance	DB
Education	Roofing	IDIQ
Hospital	Specialty	JOC
Corrections	Demolition	Low Bid
Financial	Development	IPD





Google



GP  
Georgia-Pacific



## PROJECT PARTNERS AND PARTICIPANTS:

- U.S. General Services Administration (GSA)
- US Army Medical Command
- Arizona State University
- Canon
- State of Oklahoma
- City of Phoenix, AZ
- University of Minnesota
- State of Alaska
- Rijkswaterstaat (Dutch public works & water management)
- Aramark
- State of Oregon
- State of Idaho
- University of Alberta
- Boise State University
- United Airlines
- Neogard / Jones-Blair
- Tremco
- Bank of Botswana
- General Dynamics C4 Systems
- Salt River Project (SRP)

- US Air Force Logistics Command
- US Coast Guard
- US Embassy (Botswana)
- US Army Corps of Engineers
- Federal Aviation Administration
- IBM
- Brunsfield
- Qwest
- Honeywell
- City of Peoria, AZ
- University of Idaho
- University of Hawaii
- University of New Mexico
- Entergy
- Sodexo
- Chartwells
- Dallas Independent School Dist.
- Olmstead County, MN
- City of Roseville, MN
- Hennepin County, MN
- Scenter
- Abengoa Solar
- City of Sitka, Alaska
- US Solar
- Rochester Public Utilities
- Harvard University
- Denver Health & Hospital Authority
- State of Missouri
- State of Washington
- Idaho Transportation Department
- State of Georgia
- Arizona State Parks
- United Excel
- East Valley Institute of Technology
- Arizona Public Service (APS)
- Rochester School District
- Fann Environmental
- Idaho State University
- On Semiconductor
- Pearson
- State of Wyoming
- Idaho Department of Corrections
- City of Miami Beach, FL
- Lewis & Clark State College
- Hawaii Department of Transportation
- Baptist Health
- City of Columbia, SC
- PECO Energy
- Intermediate District 287

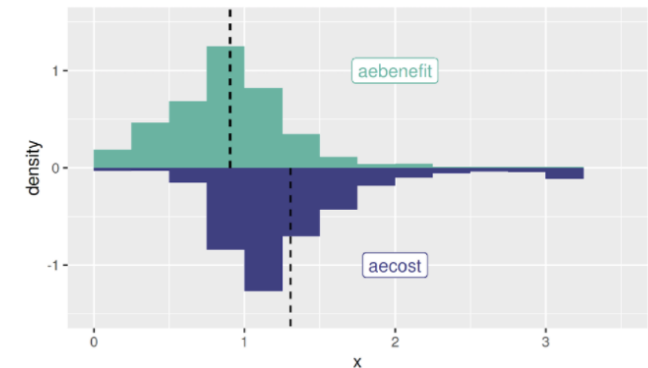
PARTNERS



# Current “Solutions”

- “Better” contracts, “Alternative” Delivery
  - DB to CM to CMAR to IPD to ....
  - Technology
  - Financial adjustments
- None have proven to not be enough to drive consistently high performance outcomes on projects (even in past times)
- Procurement often overemphasizes the power of a contract to drive performance and protect the organization from non-performance
- Many organizations struggle to show value in the work and performance that is received – getting “finished” is not enough of a performance metric to use to make economic and org decisions

Study: Cost-Benefit Analyses for Projects Are 'Worse than Worthless'



October 8, 2021

Peter Reina

KEYWORDS construction projects  
/ cost / economic analysis

Order Reprints

A large new global study of project performance over 86 years confirms that ingrained optimism bias results in forecast-based cost-benefit analyses "so misleading as to be worse than worthless," say UK researchers. While construction technology and practice have developed over the decades, failures of cost-benefit analysis "seem universal across space and time," they add.

<https://www.enr.com/articles/52612-study-cost-benefit-analyses-for-projects-are-worse-than-worthless>

# Reality







# Reality of the Situation

- Performance in built environment (construction, design, FM work) **has been proven to NOT correlate** to contract types, delivery methods, software, design quality, etc.
- Performance on built environment work **HAS BEEN PROVEN to highly correlate** to the capability, skill, and experience of the people doing the work – the critical personnel on a project – PM, SS, Client Lead, Design Arch, Key Engrs, Critical Sub SS, FM, technicians, etc.

# Importance of the People

**The ability to realize**

**innovation,**

**risk minimization,**

**value creation, &**

**cost reduction**

**will not exceed the capability  
of the people doing the work**

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



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

# Case Study

- Challenges with performance of procured services
- How fair is the procurement process
- How transparent is the procurement process
- What is most important to the owner
- What is their overall satisfaction with the owner

# Vendor Perceptions

## 56 Contractors

### CONTRACTOR ASSESSMENT

Regarding Experiences With The State of Tennessee

#### OVERVIEW

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

#### SURVEY RESULTS

**56** Contractors responded to the anonymous survey

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

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

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

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

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

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

Overall Satisfaction with State of TN = **31%**

Overall Satisfaction with other Owners they work for = **80%**

#### COMPARISON

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

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



# Vendor Perceptions

56 Contractors

**31%** believe the process is fair

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

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

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

## CONTRACTOR ASSESSMENT

Regarding Experiences With The State of Tennessee

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## What impacts would this have if you were a vendor?

**CONTRACTOR ASSESSMENT**  
Contractors' Perceptions Regarding Working With The State of Tennessee

**OVERVIEW**  
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**SURVEY RESULTS**

56 Contractors responded to the anonymous survey

- 31% believe that the procurement process is fair
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- 75% believe that the State is more concerned about lowest cost rather than highest value
- 89% believe that Contractors should be awarded projects based on their overall value
- 31% believe that the Scope of Work is complete & accurate
- 42% Satisfaction with the length of time it takes to get the State of TN

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

**COMPARISON**  
The following table provides a comparison of the State of Tennessee's performance against other public agencies based on the survey results and analysis.

CRITERIA	STATE OF TN	3 PUBLIC AGENCIES
1. The procurement process is clear and transparent	21%	85%
2. The procurement process is fair	31%	69%
3. The Organization is more concerned about lowest cost rather than value	75%	65%
4. Overall satisfaction with the State of TN	31%	77%
5. Overall satisfaction with other Owners they work for	31%	80%
6. Time taken to get the State of TN	42%	77%



*If Vendor Perceive That Process Is Not Fair*

**Who bids**

**Quality of the bid**

**Quality of the team assigned**

**Quality and Performance of the services**



# Supplier Perceptions Matter!



**RFP  
Solicitation**



# The RFP Solicitation

# What Is The Primary Goal Of The RFP?

# What Is The 'Primary' Objective

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

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

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



# What Is The Primary Goal Of The RFP?

**Help us award to a high-performing supplier**



# Important

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

# What Type Of Suppliers Do You Want To Attract?

*Supplier A*



*Supplier B*





# Proposals Cost Money



# Suppliers Don't Have Unlimited Funds



# Proposing Costs Money

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

# Organizing a High-Performing RFP

# 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



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What Will Be Evaluated

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3 Proposal Requirements

4 Evaluation Procedures

How the Client will Score & Award

5 Administrative Requirements

6 Proposal Forms

7 Attachments & Exhibits

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3 Proposal  
Requirements

4 Evaluation  
Procedures

5 Administrative  
Requirements

General Instructions, Dates & Contact

6 Proposal Forms

7 Attachments  
& Exhibits

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7 Attachments & Exhibits

Forms for Vendors to Complete



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Supplemental Information



Center for Procurement Excellence

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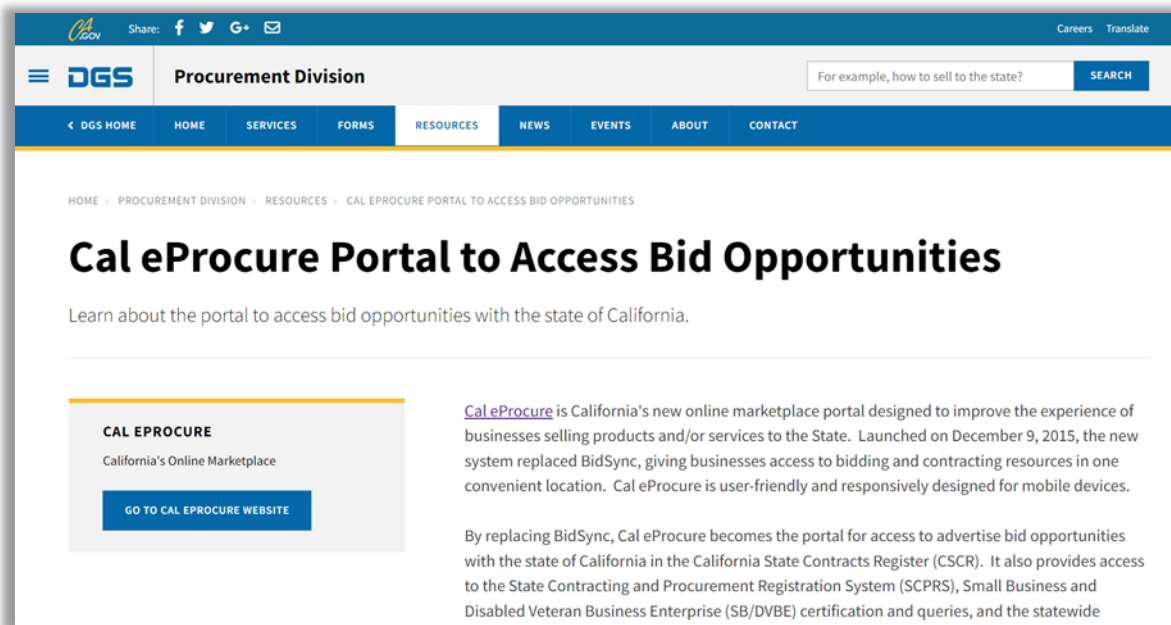
Supplemental Information

# Simple Things To Consider

# Attracting Suppliers

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

# Registration

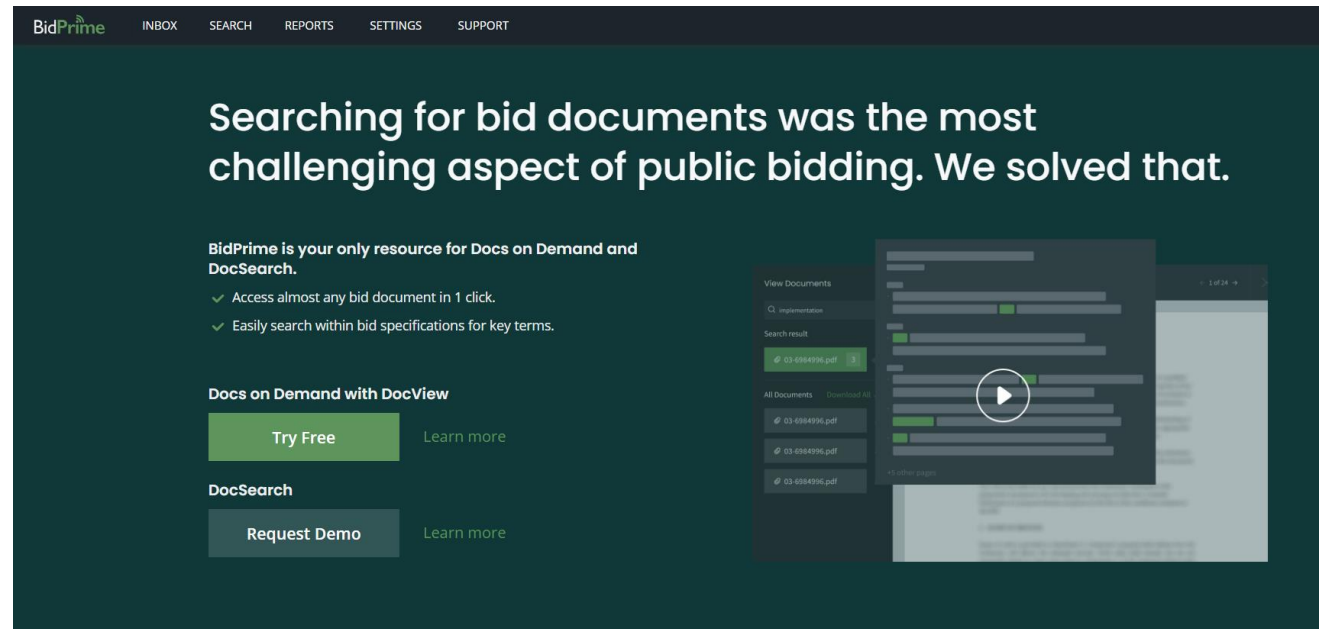


- How many agencies have their own eProcurement system?
- Local firms may be registered with the State's system
- Larger/National firms cannot afford to register with every Public organization across the country

# National Solicitation Warehouse

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

BidPrime





## SAVED SEARCH

## AGENCIES

United States All States &amp; Territories

✓ **State and Local** (984)

Canada All Provinces

✓ Canada (159)

Filter Agency Type

## DATE RANGE

Active

## ADVANCED



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<input type="checkbox"/>	REFNUM	TITLE	ENTITY	STATE	EXPIRES	ISSUED ↓
<input type="checkbox"/>	Request for ...	<a href="#">Request</a> for <a href="#">Proposals</a> - Preparation of Construction Documents for the <a href="#">Proposed</a> Downtown Maho...	town of Carmel	NY	1/8/2022	1 hour ago
<input type="checkbox"/>	Request for ...	<a href="#">Request</a> for <a href="#">Proposals</a>	Upper Cumberland Development D...	TN	5/31/2022	2 hours ago
<input type="checkbox"/>	RFQ #22-03 ...	NOTICE: <a href="#">REQUEST</a> FOR QUALIFICATIONS RFQ #22-03 The City of Galveston Is Accepting Sealed <a href="#">Pro...</a>	The Daily News	TX	6/22/2022	2 hours ago
<input type="checkbox"/>	RFP NO.	CITY OF FRIENDSWOOD, TEXAS <a href="#">REQUEST</a> FOR <a href="#">PROPOSALS</a> NO. 2022-11 CITY GROUP MEDICAL IN...	The Daily News	TX	6/1/2022	2 hours ago
<input type="checkbox"/>	9 REQUEST ...	9 <a href="#">Request</a> for <a href="#">Proposals</a> Ya	Yakima Herald-Republic	WA	6/21/2022	2 hours ago
<input type="checkbox"/>	Request for ...	<a href="#">Request</a> for <a href="#">Proposals</a> for Professional Auditing Services	City of Warrensburg	MO	6/24/2022	2 hours ago
<input type="checkbox"/>	Lady Bird Jo...	Lady Bird Johnson Golf Course Golf Cart Lease <a href="#">Request</a> for <a href="#">Proposals</a>	City of Fredericksburg	TX	6/24/2022	2 hours ago
<input type="checkbox"/>	Notice is her...	<a href="#">🌐</a> Notice Is Hereby Given that This <a href="#">Request</a> for <a href="#">Proposal</a> (RFP) Is Be- Ing Issued for the Following S...	The Wayne County Outlook	KY	6/22/2022	4 hours ago
<input type="checkbox"/>	Request for ...	<a href="#">🌐</a> <a href="#">Request</a> for <a href="#">Proposal</a> - School Based Nursing Services	Clay County Public Schools	KY	6/2/2022	4 hours ago
<input type="checkbox"/>	BD-22-1311...	<a href="#">Request</a> for <a href="#">Proposals</a> - General Contractor Services (North Main Street Water and Sewer Replacem...	State of Massachusetts - Commbuys	MA	6/1/2022	4 hours ago
<input type="checkbox"/>	REQUEST F...	<a href="#">REQUEST</a> FOR PROPOSALThe Camden Water Utilities of Camden, Arkansas, Is <a href="#">Requesting</a> <a href="#">Proposals</a> ...	Arkansas Online Classifieds	AR	6/9/2022	4 hours ago
<input type="checkbox"/>	REQUEST F...	<a href="#">REQUEST</a> FOR QUALIFICATIONS FOR ENGINEERING SERVICES RELATED to the DESIGN of a Shared ...	The Columbian	WA	6/24/2022	5 hours ago
<input type="checkbox"/>	Request for ...	<a href="#">Request</a> for <a href="#">Proposals</a> No. 22P0079MG: Janitorial Services – UAF Kodiak	State of Alaska	AK	6/15/2022	5 hours ago
<input type="checkbox"/>	2863898-05...	<a href="#">🌐</a> <a href="#">Request</a> for <a href="#">Proposal</a> - Event Cleaning - Neyland Stadium Attachments <a href="#">Request</a> for <a href="#">Proposal</a> - N...	University of Tennessee	TN	6/1/2022	6 hours ago
<input type="checkbox"/>	2022-9175246	UNICEF <a href="#">Request</a> for <a href="#">Proposal</a> No. 2022-9175246 Long Term Arrangements for Emergency Water Se...	United Nations Global Marketplace...	NY	6/12/2022	6 hours ago
<input type="checkbox"/>	12989929 R...	<a href="#">✉</a> <a href="#">Request</a> for <a href="#">Proposal</a> for Traffic Agent (Special Constable) Training Development and Delivery (L...	Government of Canada - Central C...	AB	6/14/2022	6 hours ago
<input type="checkbox"/>	Request for ...	#EWM151: Enrollment Consultant- UIC School of LawUniversity of Illinois at Chicago RFP #EWM15...	University of Illinois at Chicago	IL	6/29/2022	6 hours ago
<input type="checkbox"/>	Request For ...	<a href="#">Request</a> for <a href="#">Proposals</a> Bristol Tennessee City Schools, 615 Martin Luther King Jr. Blvd., Bristol, TN Wi...	Bristol Herald Courier	VA	6/8/2022	6 hours ago
<input type="checkbox"/>	Request for ...	NOTICE Bland County Public Schools Is <a href="#">Requesting</a> the Following <a href="#">Proposals</a> : RFP 2022-1 Milk, Juice ...	Bristol Herald Courier	VA	6/9/2022	6 hours ago
<input type="checkbox"/>	REQUEST F...	<a href="#">Request</a> for <a href="#">Proposal</a> #22-13: Indefinite Delivery/indefinite Quantity Low Voltage Work	Rockdale Citizen & Newton Citizen	GA	6/24/2022	7 hours ago

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

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## Request for Proposal: The Camden Water Utilities of Camden, Arkansas is Requesting Proposals...



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<input type="checkbox"/>	RFP NO.	CITY OF FRIENDSWOOD, TEXAS REQUEST FOR PROPOSALS NO. 2022-11 CITY GROUP MEDICAL IN...	The Daily News	TX	6/1/2022	2 hours ago
<input type="checkbox"/>	9 REQUEST ...	9 Request for Proposals Ya	Yakima Herald Republic	WA	6/21/2022	2 hours ago
<input type="checkbox"/>	Request for ...					
<input type="checkbox"/>	Lady Bird Jo...					
<input type="checkbox"/>	Notice is her...					
<input type="checkbox"/>	Request for ...					
<input type="checkbox"/>	BD-22-1311...	Request for Proposals - General Contractor Services (North Main Street Water and Sewer Replacem...	State of Massachusetts - Commbuys	MA	6/1/2022	4 hours ago
<input type="checkbox"/>	REQUEST F...	REQUEST FOR PROPOSALThe Camden Water Utilities of Camden, Arkansas, Is Requesting Proposals...	Arkansas Online Classifieds	AR	6/9/2022	4 hours ago
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<input type="checkbox"/>	Request for ...	Request for Proposals No. 22P0079MG: Janitorial Services – UAF Kodiak	State of Alaska	AK	6/15/2022	5 hours ago
<input type="checkbox"/>	2863898-05...	Request for Proposal - Event Cleaning - Neyland Stadium Attachments Request for Proposal - N...	University of Tennessee	TN	6/1/2022	6 hours ago
<input type="checkbox"/>	2022-9175246	UNICEF Request for Proposal No. 2022-9175246 Long Term Arrangements for Emergency Water Se...	United Nations Global Marketplace...	NY	6/12/2022	6 hours ago
<input type="checkbox"/>	12989929 R...	Request for Proposal for Traffic Agent (Special Constable) Training Development and Delivery (L...	Government of Canada - Central C...	AB	6/14/2022	6 hours ago
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<input type="checkbox"/>	REQUEST F...	Request for Proposal #22-13: Indefinite Delivery/indefinite Quantity Low Voltage Work	Rockdale Citizen & Newton Citizen	GA	6/24/2022	7 hours ago

## Request for Proposal: The Camden Water Utilities of Camden, Arkansas is Requesting Proposals...

← Page 1 of 46 → ↺

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<input type="checkbox"/>	REFNUM	TITLE	ENTITY	STATE	EXPIRES	ISSUED ↓
<input type="checkbox"/>	Request for ...	Request for Proposals - Preparation of Construction Documents for the Proposed Downtown Maho...	town of Carmel	NY	1/8/2022	1 hour ago
<input type="checkbox"/>	Request for ...	Request for Proposals	Upper Cumberland Development D...	TN	5/31/2022	2 hours ago
<input type="checkbox"/>	RFQ #22-03 ...	NOTICE: REQUEST FOR QUALIFICATIONS RFQ #22-03 The City of Galveston Is Accepting Sealed Pro...	The Daily News	TX	6/22/2022	2 hours ago
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<input type="checkbox"/>	9 REQUEST ...	9 Request for Proposals Ya	Yakima Herald-Republic	WA	6/21/2022	2 hours ago
<input type="checkbox"/>	Request for ...	Request for Proposals for Professional Auditing Services	City of Warrensburg	MO	6/24/2022	2 hours ago
<input type="checkbox"/>	Lady Bird Jo...	Lady Bird Johnson Golf Course Golf Cart Lease Request for Proposals	City of Fredericksburg	TX	6/24/2022	2 hours ago
<input type="checkbox"/>	Notice is her...	🔗 Notice Is Hereby Given that This Request for Proposal (RFP) Is Be- Ing Issued for the Following S...	The Wayne County Outlook	KY	6/22/2022	4 hours ago
<input type="checkbox"/>	Request for ...	🔗 Request for Proposal - School Based Nursing Services	Clay County Public Schools	KY	6/2/2022	4 hours ago
<input type="checkbox"/>	BD-22-1311...	Request for Proposals - General Contractor Services (North Main Street Water and Sewer Replacem...	State of Massachusetts - Commbuys	MA	6/1/2022	4 hours ago
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# Avoid Long or Vague Titles

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



# Avoid Long or Vague Titles

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



# Avoid Long or Vague Titles

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

# Avoid Long or Vague Titles

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

# Attracting Suppliers

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

# Enterprise Resource Planning System

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



















































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*Docs On Demand*

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Agency Contact Info 

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

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

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# Which File Contains The RFP?

## Project Management Information System SaaS and Implementation

Great Lakes Water Authority

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

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

**Documents:** 2101347.Addendum... 2101347.Administrat... 2101347.Administrat... 2101347.Procureme... 2101347.ContractSa... B.I.D.Requirements... 2101347.Solicitation... ExceptionChecklist.p...  
 ExceptionChecklist1... SystemRequirement... ExceptionChecklist1... 2101347.Administrat... 2101347.Administrat... SystemRequirement... B.I.D.Requirements... ExceptionChecklist.p...  
 2101347.Addendum... 2101347.Procureme... 2101347.Solicitation... SystemRequirement... ExceptionChecklist1... ExceptionChecklist.p... B.I.D.Requirements... 2101347.Procureme...  
 2101347.ContractSa... 2101347.Addendum... 2101347.Administrat... 2101347.Solicitation... 2101347.Administrat... GLWA-2022-2026-CI... GLWA-2022-2026-CI...

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### More Info:

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

# Which File Contains The RFP?

**Project Management Information System SaaS and Implementation**  
Great Lakes Water Authority

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

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

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

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

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

# Attracting Suppliers

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



# Don't Make It Difficult To Read

**APPENDIX E – PROJECT DESCRIPTION**

**AUDIT AND ACCOUNTABILITY FUND**

Service Delivery and Modernization Review of Development Review

**Project Purpose**

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

**Project Objective**

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

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

**Background**

**Audit and Accountability Fund**

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

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

**Project Selection**

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

**City of Kitchener Development Services Review**

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

**Appendix A – Registration Form**

TO : Independent Electricity System Operator

FROM : [Insert Name of Proponent]

RE : Fairness Advisor Services

Password

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

Enter Password:

OK Cancel

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

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

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

# Attracting Suppliers

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

# Respond to 20 Items...

## Requested Information:

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

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

# Respond to 20 Items...

## *For Chance At Winning \$25K*

### Requested Information:

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

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



# Attracting Suppliers

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

# Most Important Items To The Supplier?

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



# Most Important Items To The Supplier?

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

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

# ***1. Can I Provide What You Need?***

- SOW
- Budget
- Schedule

## 1. Can I Provide What You Need?

- SOW
- Budget
- Schedule

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

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



## 1. Can I Provide What You Need?

- SOW
- Budget
- Schedule

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

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

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


- Proposal contents

# Putting RFP Excellence Into Practice

- Fair
- Open
- Transparent
- Value
- Integrity

# RFP

Request for Proposal



Information Technology (IT)  
Software Implementation Template

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

# We spend a lot of time focusing on the Scope...

- 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





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



# Importance of Current Conditions

- Allows the Proposers to understand the impact of the change
- Allows the Proposer to confirm if Scope is achievable
- Allows the Proposer to identify & address challenges
- Allows the Proposer to verify the accuracy of your Scope



***Goal Is Not  
Perfection!***



***Do Our Best  
Within Resource  
Constraints***



***...But We  
Can't Totally  
Miss The  
Target!!!***

# Free Webinar Series

**3<sup>rd</sup> 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](https://center4procurement.org)

18

January

← Earlier today!



 Add to Calendar

### Can We Craft Better RFP Questions to Ask Our Vendors?

Has your procurement group ever asked this question? Usually the intent is to better differentiate vendors during the proposal stage. Despite the good intent, we will discuss why this is the \*wrong\* question to ask (no offense!!!) and how to change the way we think

15

February



 Add to Calendar

### Setting Realistic Procurement Schedules

Do your evaluation teams insist on rapid procurement timelines... only to delay things as the process unfolds? This session will discuss the foundations of a solid procurement timeline and share facilitation skills to help your evaluation teams be more realistic. Fewer delays = fewer headaches!



# Upcoming Topics!

Register at: [center4procurement.org/rfp-doctor](https://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/](http://www.naspo.org/procurement-u/)
- Open to all (even non-members of NASPO)
- Limited to first 100 participants.





# Volunteers Requested!

- CPE is conducting a research project on the use of Diversity, Equity, & Inclusion (DEI) as part of the procurement process
- Looking to understand:
  - Best practices & recommendations
  - Innovative ideas
  - RFP structure and integration
- We need volunteers for a brief interview!
  - Experience in this area
  - Policy insights
  - Firsthand knowledge

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# Want today's Presentation?

White papers?

Toolkits?

Templates?



[center4procurement.org/dfw-nigp/](https://center4procurement.org/dfw-nigp/)

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