RFPs as a Part of Procurement Excellence

Procurement Month Training Event

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Download Slides & Resources

center4procurement.org/santa-clara

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Some questions...

How often do we... drop in the SOW and move on?

Do we feel like we may have no expertise?

Asked to write the entire SOW?
[and then get it done yesterday?]

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Some answers?

Drop in SOW and move-on? → **Think Long Term**

We don't have expertise? → **See beauty in Simplicity**

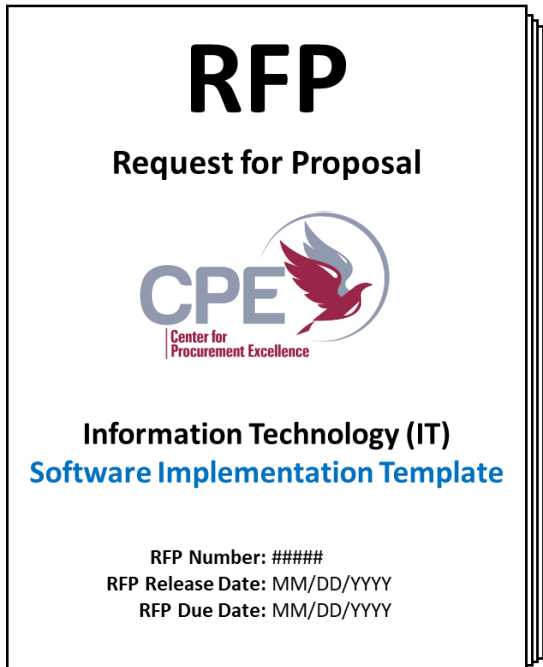Write the entire SOW? → ***Facilitate*** **SOW Development**

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1) Prepare & Advertise

RFP

Request for Proposal

Information Technology (IT)
Software Implementation Template

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

Procurement Process

Advertise **1**

Vendors Submit Responses

RFP

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Procurement Process

Advertise
1

Vendor Responses

2) Evaluate Responses

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Procurement Process

Advertise 1

Evaluate 2

Vendor Responses

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3) Award Contract

RFP

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Procurement Process

1 *Advertise* 2 *Evaluate* 3 *Award*

Vendor Responses

Contract

Solicitation Contents

1) Statement of Work

2) Evaluation Criteria & Procedures

3) Administrative Requirements

4) Submittal Forms & Exhibits

Industry Acronyms

3 Types of Solicitations
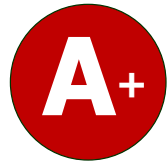## Based On
Award Factors

3 Solicitation Award Factors
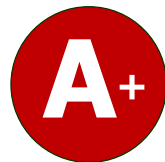
1. Award based on **Cost only**

   $

2. Award based on **Qualifications only**

   A+

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

   $ A+

Consider 4 Project 'Traits'

ITB ← → **RFP**

Low $	**Value**	High $$$
Simple	**Complexity**	Complex
High	**Expertise**	Limited
Low	**Politics**	High

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The Foundations of Procurement Excellence
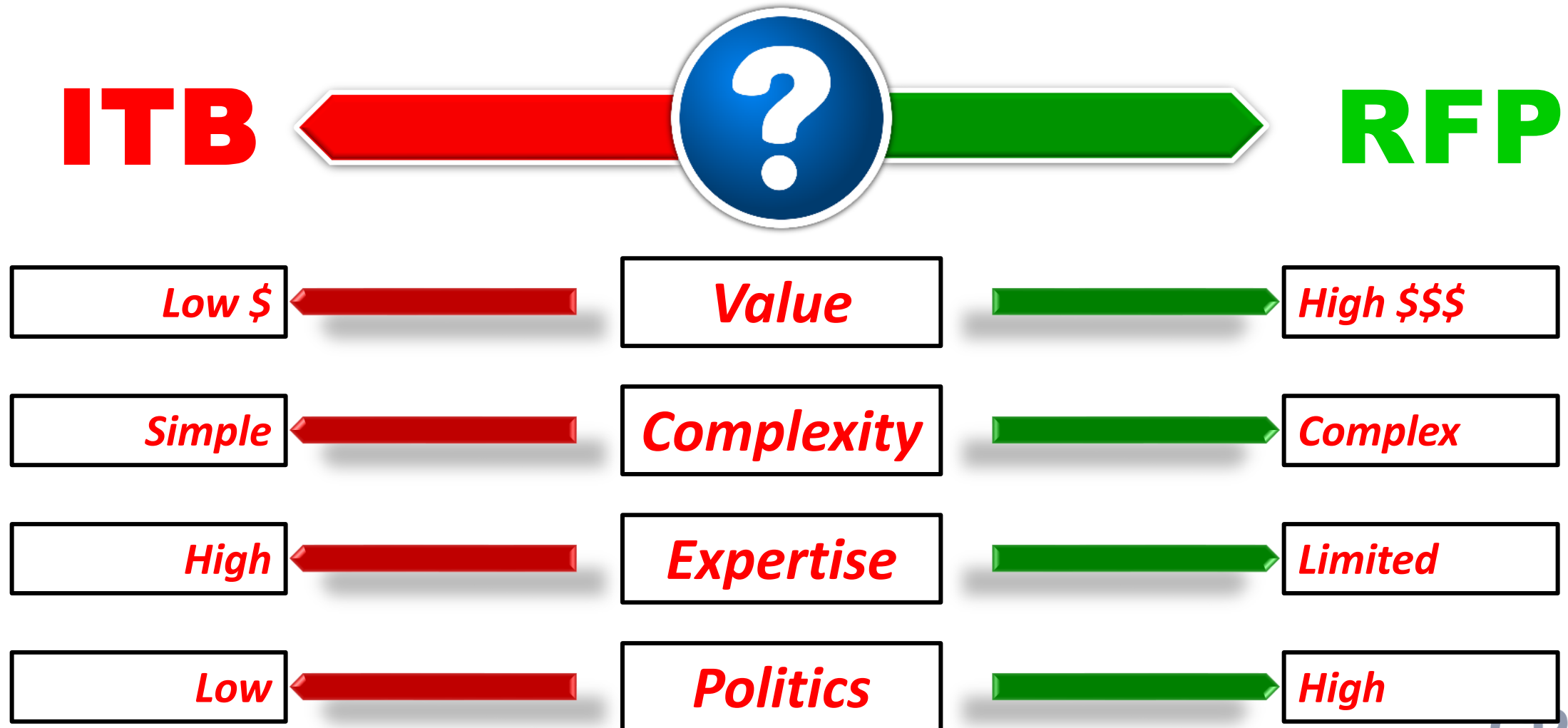
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"5 Foundations of Procurement Excellence" Handout

5 Foundations of RFP Excellence

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

Fair: provide all vendors with an equal opportunity to win

Highlighted Practices from CPE:
- Protect the good of the public and the organization
- Follow a realistic procurement schedule
- Minimize bias in evaluations

Open: encourage & maximize competition

Highlighted Practices from CPE:
- Reduce "upstream" restrictions on who can propose
- Avoid burdensome submittal requirements
- Utilize RFPs to solicit alternatives and innovations

Transparent: provide a clear, concise, & accurate process

Highlighted Practices from CPE:
- Clear: release your budget & schedule constraints
- Concise: define what you want (with maximum limits)
- Accurate: seek to maximize differentiation

Value: optimize the organization's return for the spend

Highlighted Practices from CPE:
- Appropriately weight the cost & qualifications criteria
- Keep cost & qualifications completely separate
- Utilize RFPs to generate project solutions

Integrity: ensure confidence & trust with high ethical standards

Highlighted Practices from CPE:
- Train to recognize unethical conduct
- Minimize the risk of protest
- Offer comprehensive debriefings

Foundations of Procurement Excellence

- **Fair**

- **Open**

- **Transparent**

- **Value**

- **Integrity**

Foundations of Procurement Excellence

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

- **Open**

- **Transparent**

- **Value**

- **Integrity**

Fair: Equal Opportunity to Win

Perceptions of Owner being Unfair or Unequal

- Pre-Conceived
- Restrictive
- Too Fast
- Unrealistic
- Too Much
- Biased
- Misunderstands Needs

- *Discourages Vendors!*

Impact

- Fewer proposals
- Lower quality proposals
- Less qualified teams
- Less competitive pricing
- Less consistent pricing
- Open to interpretation
- Have to believe the vendor

- *Brings Risk to the Project!*

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Foundations of Procurement Excellence

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

- Open

- Transparent

- Value

- Integrity

Foundations of Procurement Excellence

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

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

- **Transparent**

- **Value**

- **Integrity**

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Open: Encourage and Maximize Competition

Who knows the <u>most</u> about delivering the required services?

An Expert Vendor

Average Proposal Size

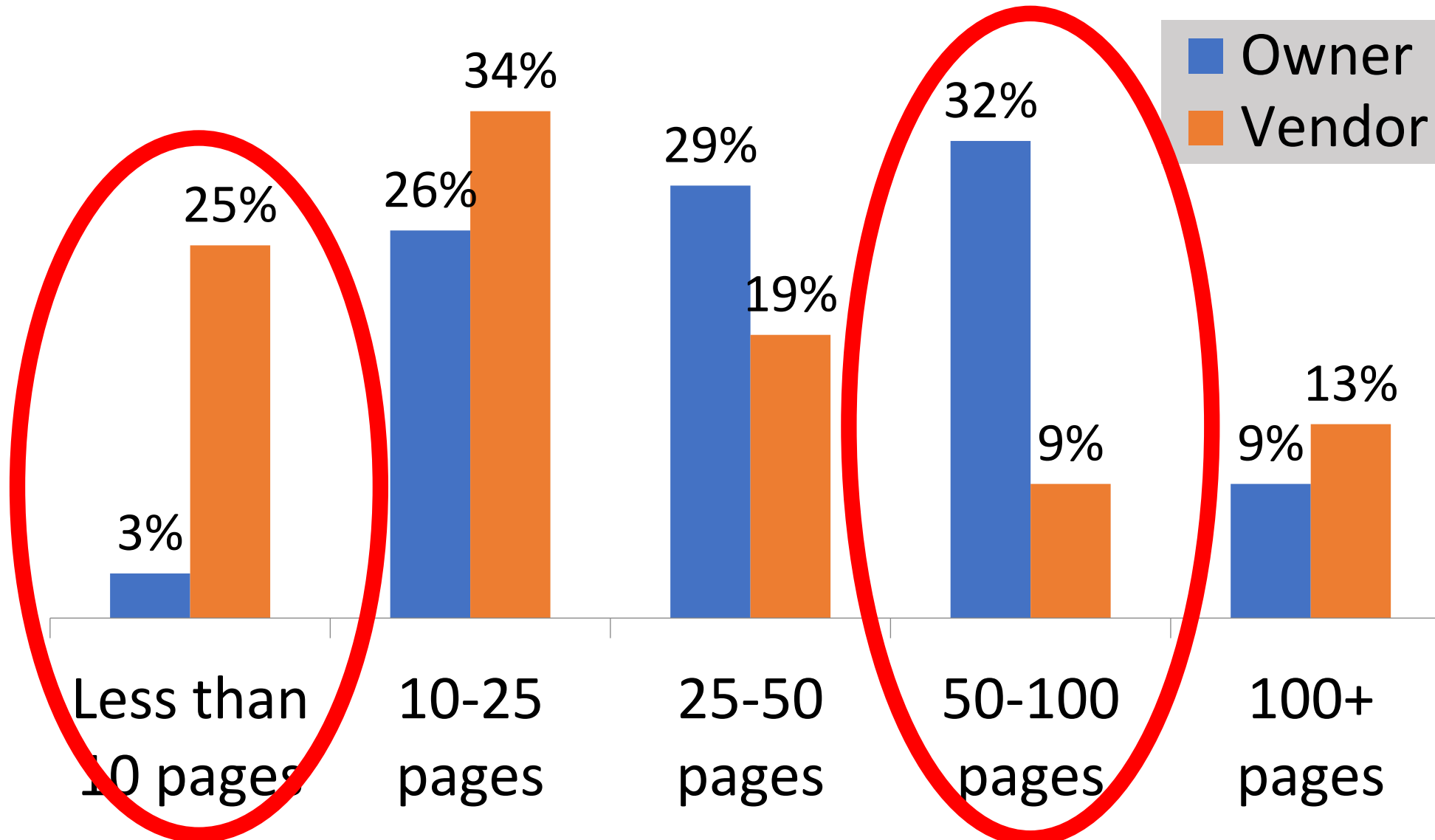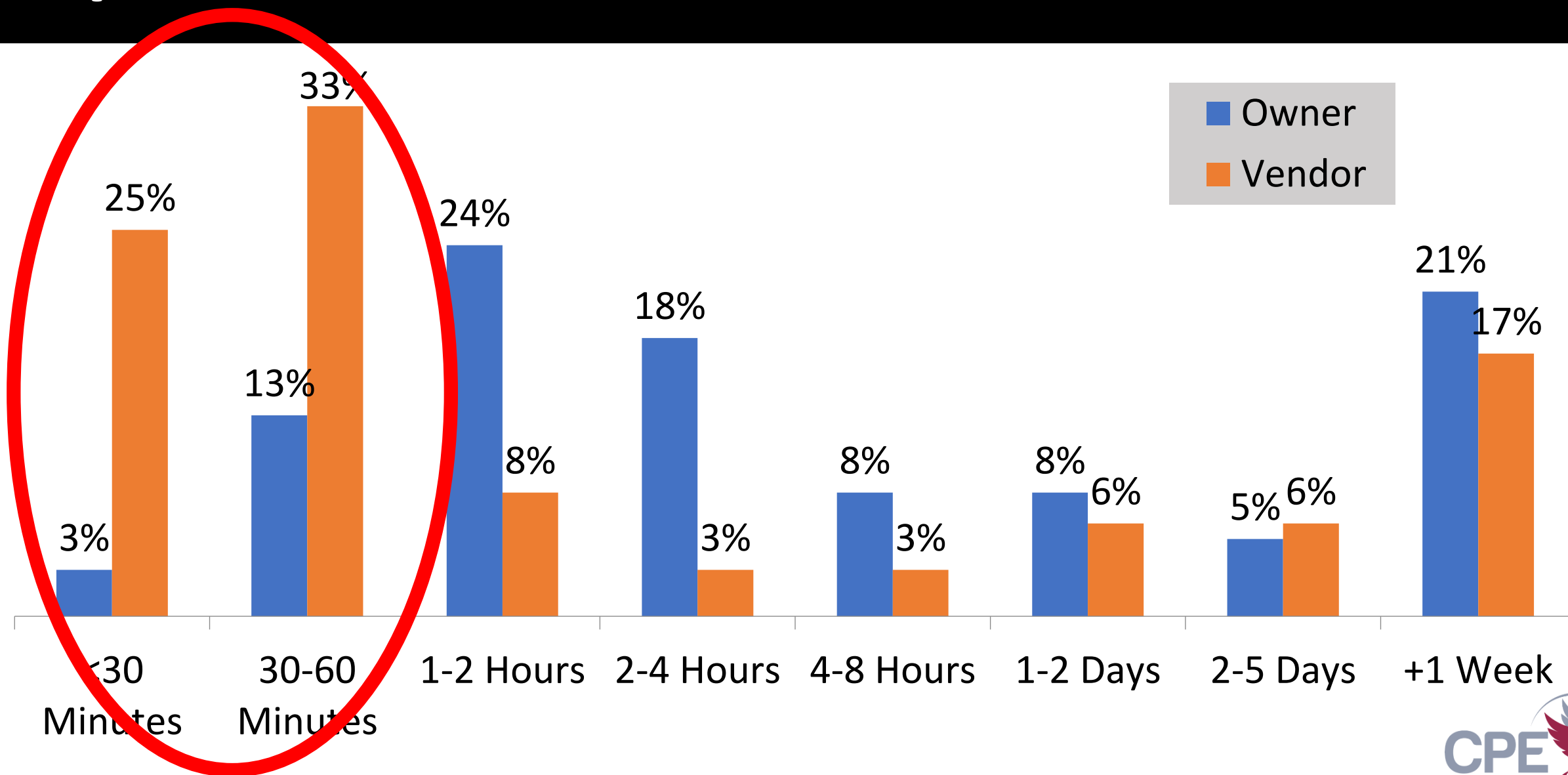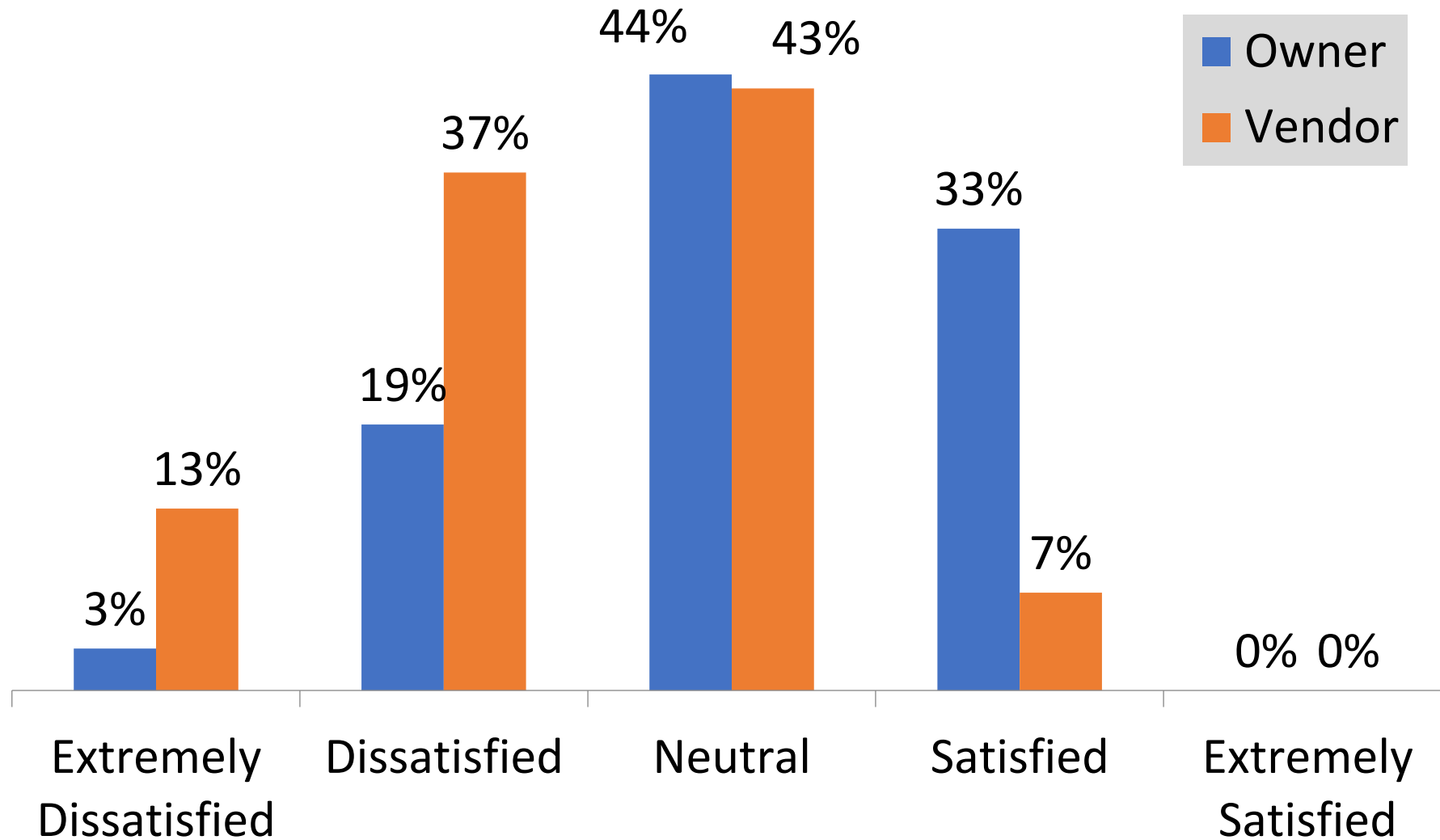# Foundations of Procurement Excellence

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

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

- **Transparent**

- **Value**

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Foundations of Procurement Excellence

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

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

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

- **Value**

- **Integrity**

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Transparent: Clear, Concise, and Accurate

Highlighted Practices from CPE:

- Clear: release your budget and schedule constraints.

- Concise: define what you want (with maximum limits).

- Accurate: seek to maximize differentiation.

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Foundations of Procurement Excellence

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Foundations of Procurement Excellence

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

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

- **Integrity**

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Value: Optimal Return for the Spend

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

Foundations of Procurement Excellence

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

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Foundations of Procurement Excellence

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Integrity: Ensure Confidence and Trust

Foundations of Procurement Excellence

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Our RFP

Mike Olbinski

Importance of a High-Performing RFP
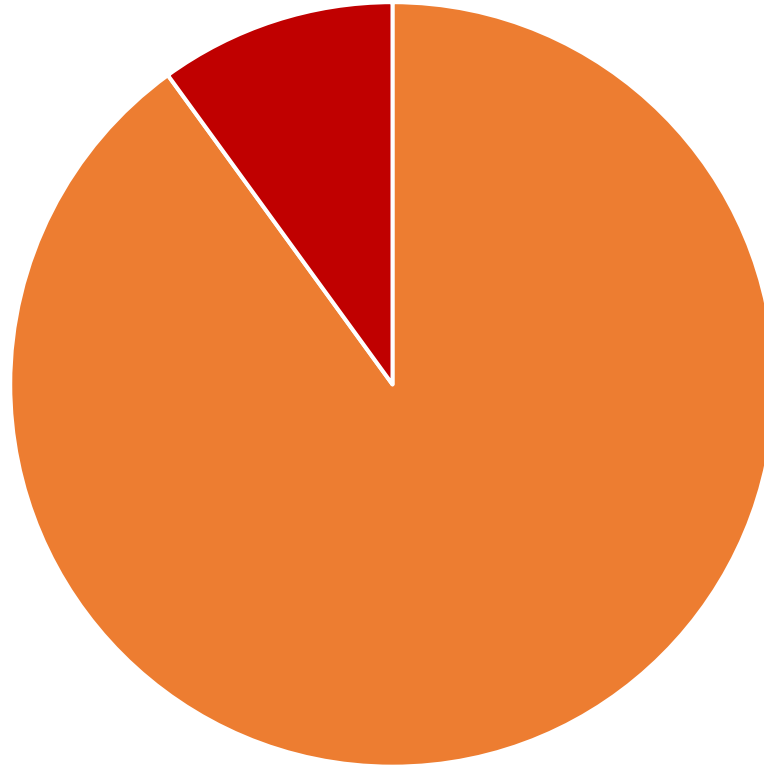
RFPs are a direct reflection of your organization and project.

Is your RFP…
- **Organized vs. Scattered?**
- **Professional vs. "Thrown Together"**
- **Easy-to-Follow vs. Confusing?**
- **Tailored vs. Recycled?**
- **High-Performing vs. "Same Old"?**

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All Procurements Are Urgent!

10% **Extremely Urgent**

90% **Urgent**

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

Common Things that Slow Down Procurement

- **Poor quality Statement of Work.**

- **Procedural items that are "clunky" or poorly coordinated.**

- **Lack of commitment from users, evaluators, and/or executives.**

- **Lack of clarity on what (and how) to evaluate.**

- **Large volume of proposal materials.**

- **Lack of interest from high-performing vendors.**

Center for Procurement Excellence RFP Templates

RFP

Request for Proposal

Information Technology (IT)
Software Implementation Template

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

Our Goal:

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

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Keep In Mind:

Different Projects
require Different RFP Specifics.

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

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Why is this Important?

Your RFP is a "first view" for the **Vendor Community**

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

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

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Goal: Organize a High-Performing RFP

- ✓ Easy to determine what to submit

- ✓ Avoid disqualification

- ✓ Highly organized and professional

- ✓ Simple and fast for vendors to review

- ✓ Less frustrating

Organizing a High-Performing RFP

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Organizing a High-Performing RFP

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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

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RFP Due Date: MM/DD/YYYY

| 1 | Statement of Work |

What You Want to Achieve

| 2 | Current Conditions |

| 3 | Proposal Requirements |

| 4 | Evaluation Procedures |

| 5 | Administrative Requirements |

| 6 | Proposal Forms |

| 7 | Attachments & Exhibits |

Organizing a High-Performing RFP

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1 | Statement of Work

2 | Current Conditions — **Where You Are At**

3 | Proposal Requirements

4 | Evaluation Procedures

5 | Administrative Requirements

6 | Proposal Forms

7 | Attachments & Exhibits

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Organizing a High-Performing RFP

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1	Statement of Work
2	Current Conditions
3	Proposal Requirements
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What Will Be Evaluated

Organizing a High-Performing RFP

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RFP Due Date: MM/DD/YYYY

1. Statement of Work
2. Current Conditions
3. Proposal Requirements
4. Evaluation Procedures — **How the Client will Score & Award**
5. Administrative Requirements
6. Proposal Forms
7. Attachments & Exhibits

Organizing a High-Performing RFP

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1	Statement of Work
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3	Proposal Requirements
4	Evaluation Procedures
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6	Proposal Forms
7	Attachments & Exhibits

General Instructions, Dates & Contact

Organizing a High-Performing RFP

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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 — **Forms for Vendors to Complete**
7. Attachments & Exhibits

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Organizing a High-Performing RFP

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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

Supplemental Information

Organizing a High-Performing RFP

RFP

Request for Proposal

Information Technology (IT)
Software Implementation Template

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

1	Statement of Work	What You Want to Achieve
2	Current Conditions	Where You Are At
3	Proposal Requirements	What Will Be Evaluated
4	Evaluation Procedures	How the Client will Score & Award
5	Administrative Requirements	General Instructions, Dates & Contact
6	Proposal Forms	Forms to Complete
7	Attachments & Exhibits	Supplemental Information

High-Performing RFPs for Every Project Type
CPE's Expertise Includes...

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

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

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

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

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Industry Insights

While CPE's organized and simplified RFP structure remains the same regardless of project type, the content, details, statement of work language, and cost evaluation processes are tailored to the specific type of service being procured. This document provides background information that procurement professionals should be familiar with when they interface with the industry sectors listed below.

Information Technology

Examples: Software Implementation / ERPs, System Integrator, Hardware, Organizational Change Management, Professional Services

- Highest Failure Rate of any Industry Sector
- Relatively New / Young Industry Sector
- Relatively "Busy" Industry Sector
- Wide Variation in Pricing Structures
- Buying a Mixture of Services (Impl/Support) + Product (Software/Hardware)
- Demonstrations are critical but widely misused.
- Temptation to match RFP/Eval complexity to Technology Complexity
- Vendors & Clients often fundamentally misaligned on SOW expectations

Business & Professional Services

Examples: Audio-Visual, Audit, Banking, Bookstore, Customs, Insurance, Marketing, Medical, Moving, Pensions, Printing

- Challenging due to the infrequent and "one-off" nature.
- Wide range of scale and budget value.
- Must know how to handle Cost-Based vs. Revenue-Generating, both in terms of upfront evaluation and performance over live of the contract.
- Lots of variables in play.
- Financials can be complex.
- Most likely project type to have high political ramifications.
- Many opportunities for innovation.

Facility Management & Operations

Examples: Food / Dining / Beverage Services, Janitorial, Waste Hauling & Management, O&M (MEP/HVAC, Elevators, Pest Control, Snow Removal, Furniture, Security, Parking, Landscaping, Cleaning Products)

- FMs must wear many "hats"
- Many "one-off" projects/services that occur every 5-10 years
- Revenue-Generating vs. Cost-Based Services
- Many repetitive, high-volume projects (i.e. renovation programs)
- SOWs can be tricky… lots of opportunities to "break up" with bid options.
- FMs often have a high degree of autonomy over their RFPs

Design & Construction

Examples: Architecture / Engineering Services, General Construction, Roofing, Various Alternative Delivery Methods, IDIQ / JOC / On-Call / VoR / Standing Order

- Oldest and Most Experienced Industry Sector with RFPs
- Lots of historical precedence!
- Low Bid, Design-Bid-Build, Qualifications-Based Selection, Brooks Act, etc.
- Oftentimes constrained by Public Policy and other Legal Precedent
- Alternative Project Delivery Methods
- Design-Build, CMAR, IPD, P3, IDIQ/JOC, etc.
- Level of SOW definition (and corresponding RFP approach) varies widely

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"Industry Insights" Handout

RFP

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Procurement Process

Contract

1 *Advertise*

2

3

Proposals
- ✓ Cost
- ✓ Work plan
- ✓ Schedule
- ✓ References

- ✓ The whole team
- ✓ Individuals
- ✓ Maybe demonstrations
- ✓ Typically 'free flowing'

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What are some examples of this?

- **Give a fake scenario, and ask them to work as a team to solve the problem**

- **Present different options, and ask them how they would respond... as a team**

- **"Has the team worked together before...?"**

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What is the purpose of the interview?

Collect information on <u>individual expertise</u>

The challenge

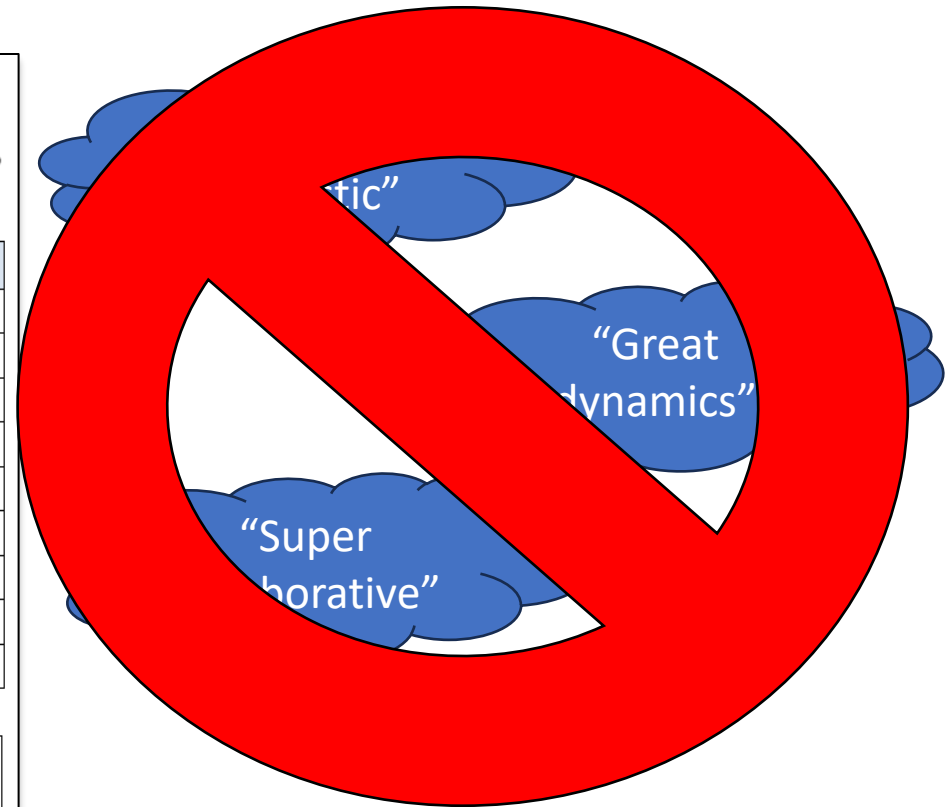How do you put "team collaborativeness" into your source selection plan?

How would you publicly defend that this is OK to do? How is it justifiable?

[ANSWER: It's not]

Solution

1) Train your evaluators… on what to NOT do

Evaluation Scores for Proposal Form D-1 – Approach & Methodology

Instructions Given to Proposers:
Submittal D-1 is intended for Proposers to provide a concise synopsis of the critical steps (phases, activities, tasks, milestones, deliverables) that will be undertaken to meet or exceed the CLIENT's expectations (cost, schedule, scope, performance, delivery, quality, functionality, etc.)
Additionally, Proposers have the option to include a 1-page schedule.

Submittal	Evaluation Score	Pros / Strengths	Cons / Weaknesses
Proposer A			
Proposer B			
Proposer C			
Proposer D			
Proposer E			
Proposer F			
Proposer G			
Proposer H			
Proposer I			

Please list questions to explore at a later stage of the evaluation process

Questions for Interviews *and/or* Demos	1. 2. 3. 4. 5.

"...tic"

"Great dynamics"

"Super collaborative"

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Solution cont'd
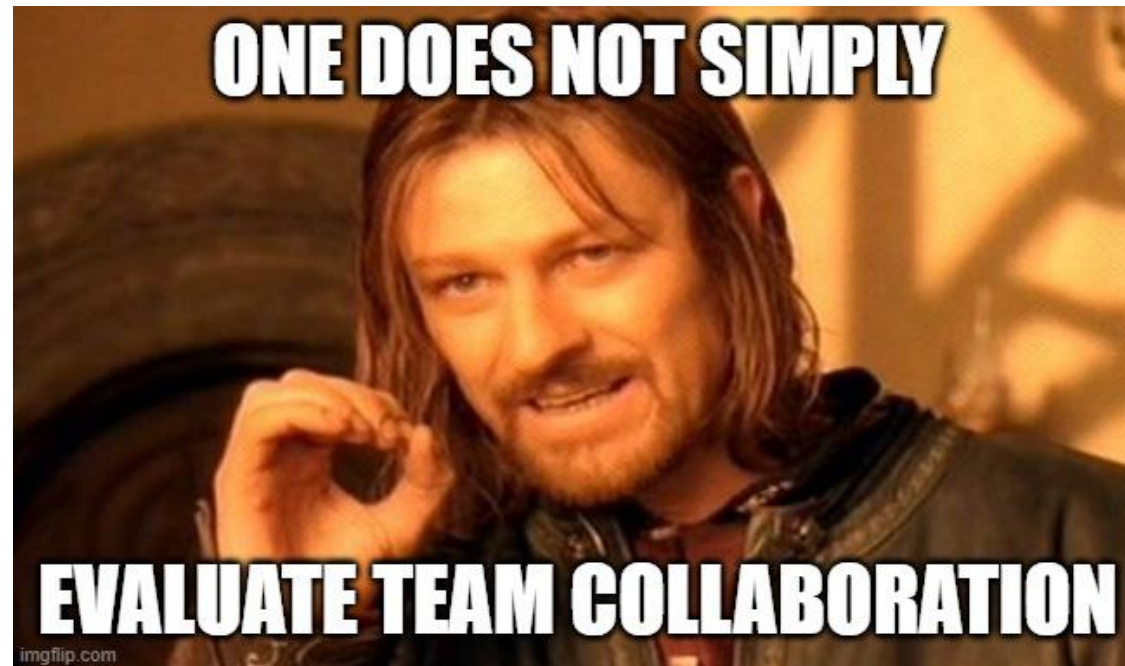
2) Don't waste experts' time
- Made up scenarios are condescending... don't yield insights... highly inauthentic

- We want to know what THEIR plan is for our project

Solution cont'd

3) It's just a faulty notion... in a given amount of time, when everyone is really busy, it is impossible for evaluators to FAIRLY evaluate what they see, or to make a good judgement call on "team dynamics"

Questions

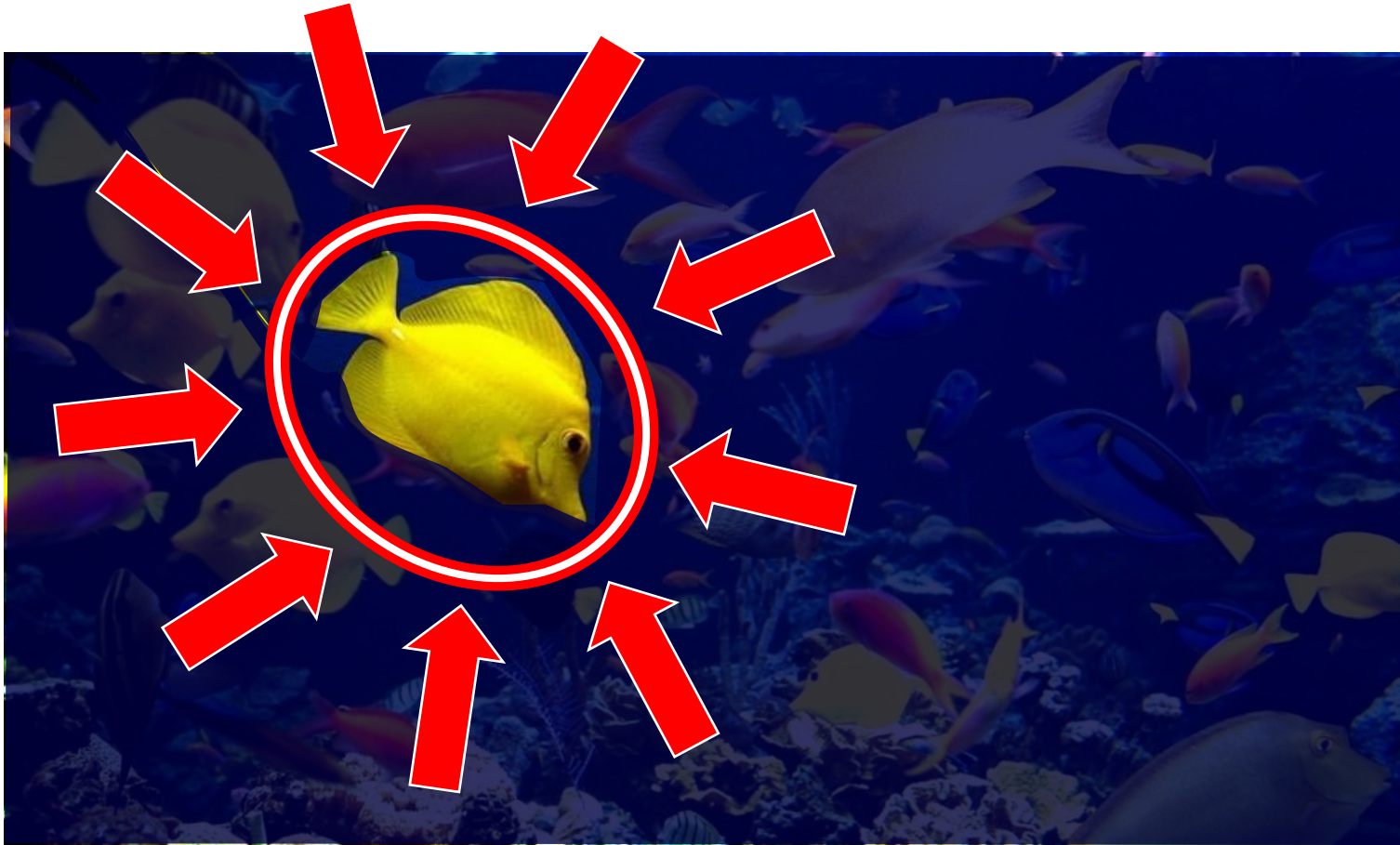**Focus on things that will your evaluators make a <u>clear</u> distinction**

Always Remember…Vendors Have Options!

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

If You Look Dangerous....

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

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FORM-5520©

Request For Proposal
Roofing Services

<<INSERT ORGANIZATION NAME>>

<<INSERT PROJECT NAME>>

1.1   PROJECT SUMMARY

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

1.2   BUDGET

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

1.3   SCHEDULE

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

1.4   PROJECT LOCATION

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

1.5   GOALS

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

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

2.1   ABOUT THE OWNER

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

2.2   KNOWN SITE & BUILDING CONDITIONS

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

3.1   DATE AND TIME REQUIREMENTS

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

3.2   GENERAL FORMAT

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

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

3.3   SUBMISSION REQUIREMENTS

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

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

ENVELOPE 1: Contains Submittal Form A-G
ENVELOPE 2: Contains only Submittal Form H (Cost Proposal)
USB Data Stick: Containing an electronic copy of the hardcopy proposal response

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

SPECIAL FORMATTING REQUIREMENTS

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

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

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

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

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

Summary

Key Learning Points

- **A great RFP is crucial in becoming a Client of Choice.**

- **Project success means we think about the long term**

- **Learnable skills that can be put directly into practice.**

- **Selection criteria that help you quickly differentiate**

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