

Harvesting Procurement Excellence: Creating an Amazing RFP



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Download Today's Slides & Resources

center4procurement.org/kppa/



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



20+ Years | 150+ Owners

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

Information Technology

Networking Help desk services
Data centers eProcurement
Hardware
COTS software
ERP systems

Facility Management

maintenance custodial
landscaping conveyance
security service pest control
building systems
industrial moving
waste management
energy management

Health Insurance/ Medical Services

Manufacturing

Business / Municipal / University Services

dining retirement fund
multi-media rights material recycling
fitness equipment bookstores
online education furniture
document management
property management
audiovisual
communications systems
emergency response systems
laundry

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
- Brunswick
- 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



Environment Protection Authority Victoria



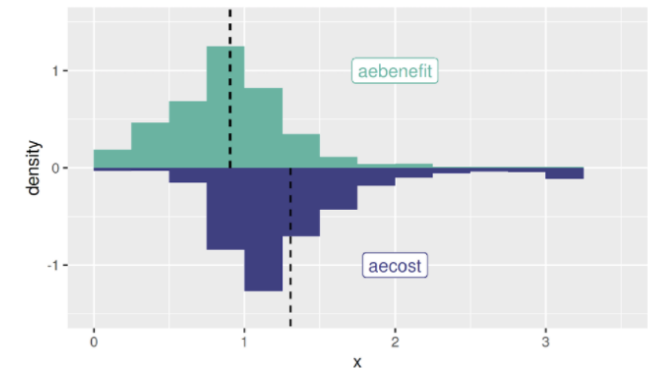
uOttawa



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)

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What impacts would this have if you were a vendor?

CONTRACTOR ASSESSMENT
Contractors' Perceptions of the Procurement Process With The State of Tennessee

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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 the contract on 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 3 State of Tennessee Public Agencies' procurement process based on vendor perceptions 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 overall value	75%	77%
4. Overall satisfaction with the State of Tennessee	31%	80%
5. Overall satisfaction with other Owners they work for		80%
6. The length of the contract		



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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**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



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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

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Where You Are At

Organizing a High-Performing RFP

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What Will Be Evaluated

Organizing a High-Performing RFP

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How the Client will Score & Award

5 Administrative Requirements

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General Instructions, Dates & Contact

Organizing a High-Performing RFP

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Forms for Vendors to Complete

Organizing a High-Performing RFP

RFP

Request for Proposal



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Supplemental Information

Organizing a High-Performing RFP

RFP

Request for Proposal



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Software Implementation Template

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6 Proposal Forms

Forms to Complete

7 Attachments & Exhibits

Supplemental Information

Simple Things To Consider

Attracting Suppliers

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

Registration

The screenshot shows the DGS Procurement Division website. The header includes the DGS logo, navigation links (HOME, SERVICES, FORMS, RESOURCES, NEWS, EVENTS, ABOUT, CONTACT), and a search bar. The main content area features a breadcrumb trail: HOME > PROCUREMENT DIVISION > RESOURCES > CAL EPROCURE PORTAL TO ACCESS BID OPPORTUNITIES. The title is "Cal eProcure Portal to Access Bid Opportunities" with a sub-headline: "Learn about the portal to access bid opportunities with the state of California." A call-to-action box on the left says "CAL EPROCURE California's Online Marketplace" with a button "GO TO CAL EPROCURE WEBSITE". The main text describes Cal eProcure as California's new online marketplace portal designed to improve the experience of businesses selling products and/or services to the State. It mentions that the system replaced BidSync, giving businesses access to bidding and contracting resources in one convenient location. It also notes that Cal eProcure is user-friendly and responsively designed for mobile devices. A final paragraph states that by replacing BidSync, Cal eProcure becomes the portal for access to advertise bid opportunities with the state of California in the California State Contracts Register (CSCR). It also provides access to the State Contracting and Procurement Registration System (SCPRS), Small Business and Disabled Veteran Business Enterprise (SB/DVBE) certification and queries, and the statewide

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

National Solicitation Warehouse

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

BidPrime

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



SEARCH

VIEW REPORT

CREATE ALERT

★ SAVE ✉ EMAIL

SORT BY NEWEST ⌵ ⌵

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

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



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



← Page 1 of 46 → ↻

1000+ Results

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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...	lown 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
<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 ...	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
<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
<input type="checkbox"/>	REQUEST F...	REQUEST FOR QUALIFICATIONS FOR ENGINEERING SERVICES RELATED to the DESIGN of a Shared ...	The Columbian	WA	6/24/2022	5 hours ago
<input type="checkbox"/>	Request for ...	Request for Proposals No. 22P0079MG: Janitorial Services – UAF Kodiak	State of Alaska	AK	6/15/2022	5 hours ago
<input type="checkbox"/>	2863898-05...	☺ Request for Proposal - Event Cleaning - Neyland Stadium Attachments Request for Proposal - N...	University of Tennessee	TN	6/1/2022	6 hours ago
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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

 View

 Source

Keywords

Snippets


















































Erp Consulting

Docs On Demand

 Download All

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

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

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

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- Step 2 – Simplify the posted documents/files
- Step 3 – Don’t make the document difficult to read
- Step 4 – Consider the amount of work for the size of the project

Respond to 20 Items...

Requested Information:

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

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

Respond to 20 Items...

For Chance At Winning \$25K

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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

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- ✘ 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?

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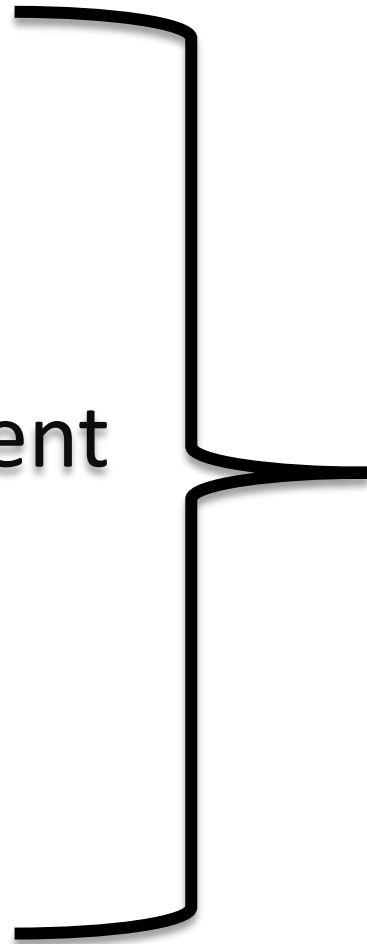
- Perceptions of being open, fair, and transparent
- Criteria & weights

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

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

17

Oct

 Add to Calendar



AI Will Change RFPs

Come learn why CPE predicts Artificial Intelligence will fundamentally change the supplier/client relationship and make solid RFP processes more important than ever!

21

Nov

 Add to Calendar



Re-Thinking Contract Negotiations

After you pick a new supplier in your RFP, what's next? This session will cover the important period between selecting the top-evaluated supplier and signing the contract. All procurement professionals should be familiar with the critical activities of this phase and to add value during negotiations.

19

December

 Add to Calendar



The Secret of How High-Qualified Suppliers can offer Lower Costs

How can highly qualified suppliers simultaneously offer cheaper costs? We'll cover an example where this happened and how the client substantiated the low cost (and ultimately achieved a successful project!) We'll also uncover the real-world benefits of how becoming a "client of choice" results in cost savings.

This afternoon →

Upcoming Topics!

Register at: center4procurement.org/rfp-doctor



NEW RESOURCE – CEU Hours!!!

CPE is pleased to announce that all attendees @ **live** “Ask the RFP Doctor” events will receive 1 hr Continuing Education Unit (CEU)!



Want today's Presentation?

White papers?

Toolkits?

Templates?



center4procurement.org/kppa/

Jake.Smithwick@charlotte.edu