

Five Ways to Adopt Best Practices in your Next RFP



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**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

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COMPARISON

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CRITERIA	STATE OF TN	3 PUBLIC AGENCIES
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What impacts would this have if you were a vendor?

CONTRACTOR ASSESSMENT
With The State of Tennessee

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- 21% believe that the procurement process is clear and transparent
- 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 way the State treats its contractors

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 major Public Agencies that were surveyed and analyzed for this report.

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%	77%
5. Overall satisfaction with other Owners they work for	31%	80%
6. The amount of vendors that are awarded projects	31%	80%



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

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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

6 Proposal Forms

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Forms for Vendors to Complete

Organizing a High-Performing RFP

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Supplemental Information

Organizing a High-Performing RFP

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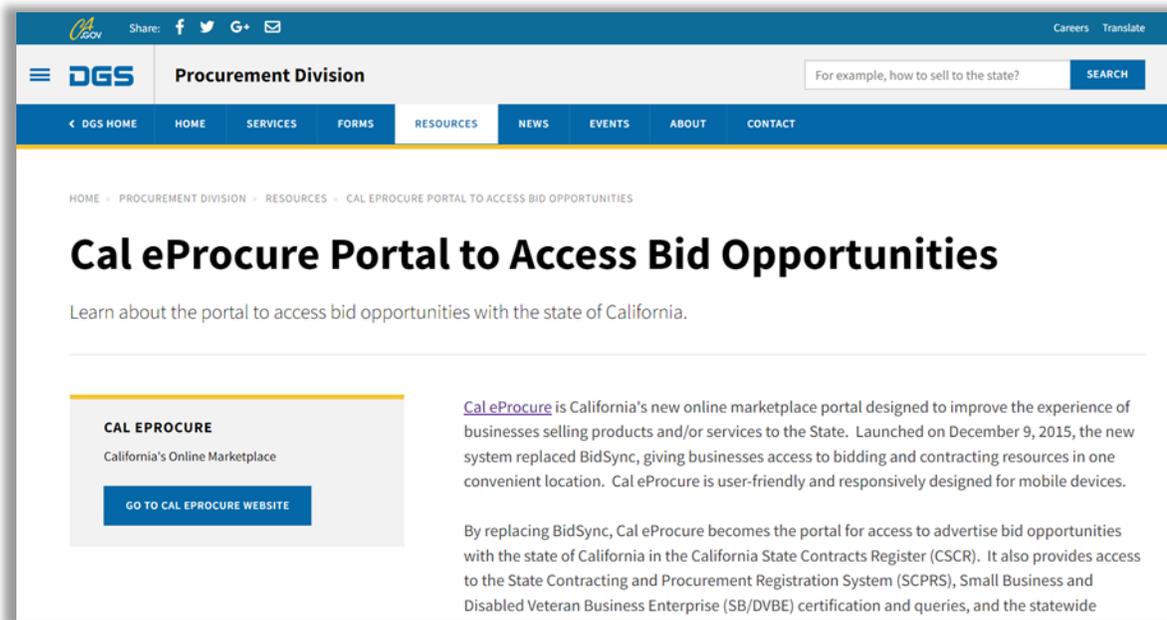
Supplemental Information

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 the title "Cal eProcure Portal to Access Bid Opportunities" and a sub-header "Learn about the portal to access bid opportunities with the state of California." Below this, there is a section titled "CAL EPROCURE" with the subtitle "California's Online Marketplace" and a button labeled "GO TO CAL EPROCURE WEBSITE". To the right of this section, there is a paragraph of text: "Cal eProcure is California's new online marketplace portal designed to improve the experience of businesses selling products and/or services to the State. Launched on December 9, 2015, the new system replaced BidSync, giving businesses access to bidding and contracting resources in one convenient location. Cal eProcure is user-friendly and responsively designed for mobile devices." Below this paragraph, there is another paragraph: "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. A 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", each with a "Learn more" link. On the right side, there is a video player showing a search interface with a search bar, search results, and a document viewer.

BidPrime INBOX SEARCH REPORTS SETTINGS SUPPORT

SAVED SEARCH

AGENCIES

United States [All States & Territories](#)

State and Local (984)

Canada [All Provinces](#)

Canada (159)

Filter Agency Type

DATE RANGE

Active

ADVANCED

SEARCH VIEW REPORT CREATE ALERT

★ SAVE EMAIL SORT BY NEWEST

REFNUM	TITLE	ENTITY	STATE	EXPIRES	ISSUED ↓	
<input type="checkbox"/>	Request for ...	Request for Proposals - Preparation of Construction Documents for the Proposed Downtown Maho...	Iown 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
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<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
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← Page 1 of 46 → 1000+ Results Show 25

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



SEARCH

VIEW REPORT

CREATE ALERT

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SORT BY NEWEST ⌵ ⌵

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



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<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





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 ...	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
<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 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

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

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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

Requested Information:

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

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Excutive Summary	File Type: Any (*.*)	Multiple	REQUIRED
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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

...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
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- ✘ Governing Laws
- ✘ 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?

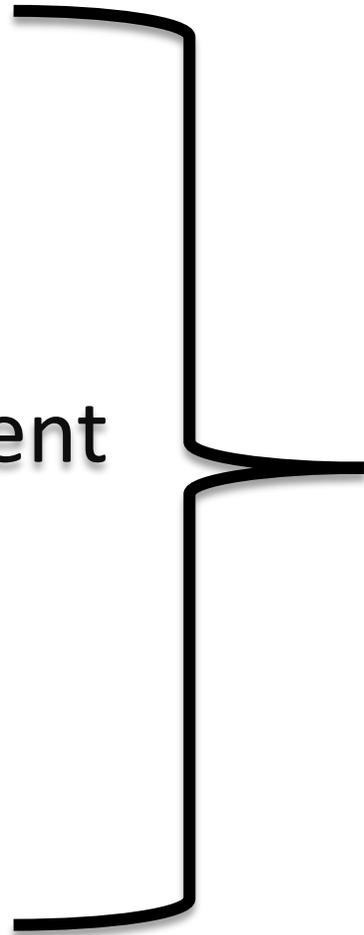
- Perceptions of being open, fair, and transparent
- Criteria & weights

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

CPE 
Center for
Procurement Excellence

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***



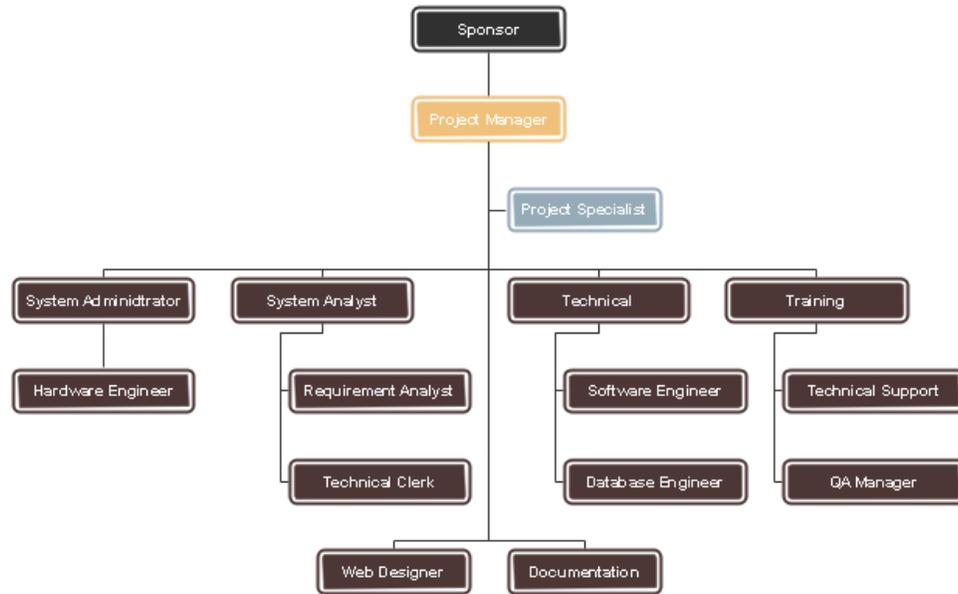
***...But We
Can't Totally
Miss The
Target!!!***

How Will You Actually Evaluate This Information?

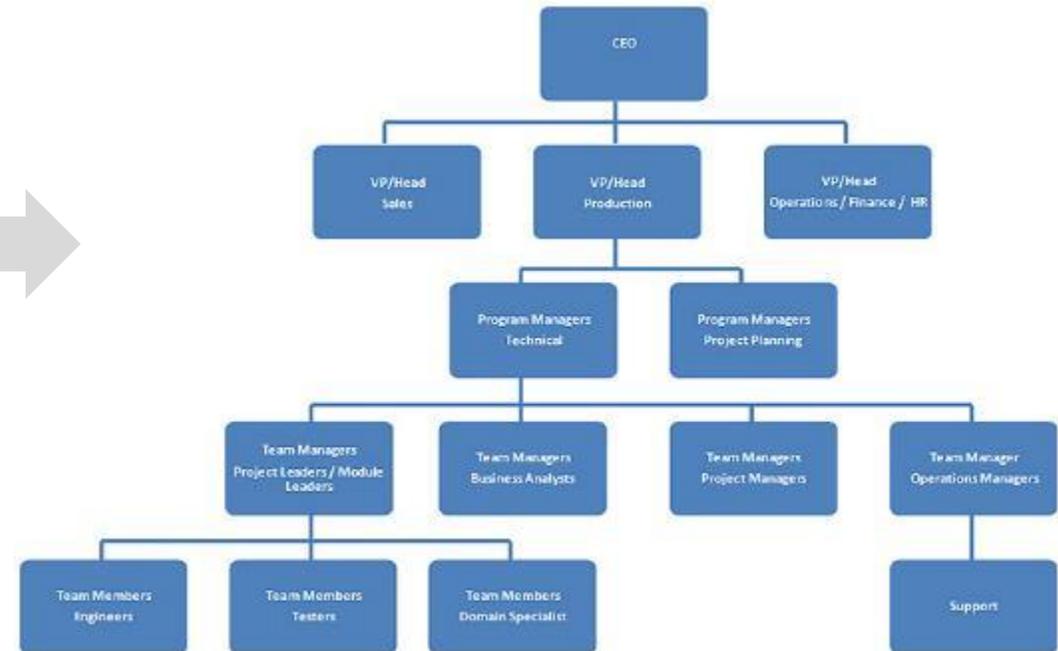
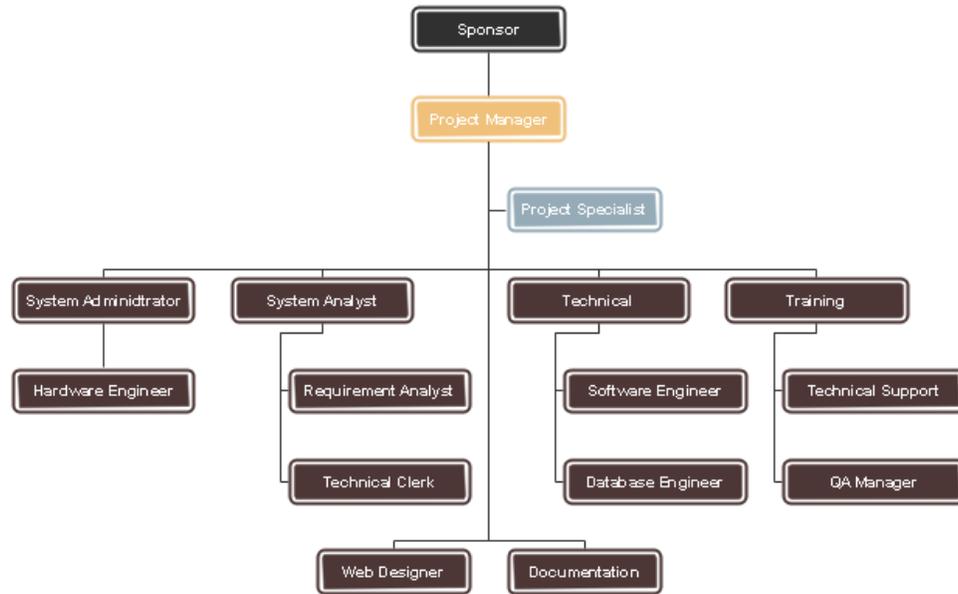
Org Chart



Org Chart



Org Chart



Staffing Plan



Staffing Plan

Role	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12	W13	W14	W15	W16	W17	W18	W19	W20	W21	W22	W23	W24	W25	W26	W27	W28
Program Manager	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Architect	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Software Developer						6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6	6
UX Architect	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Database Architect		1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Integration Architect	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Software Lead						1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Software Tester	1	1	1	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2
Functional Lead	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Business Analyst	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Project Manager	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1

11 personnel

Staffing Plan

Role	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12	W13	W14	W15	W16	W17	W18	W19	W20	W21	W22	W23	W24	W25	W26	W27	W28
Program Manager	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Architect	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Software Developer																												
UX Architect	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Database Architect	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Integration Architect	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Software Lead	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
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11 personnel

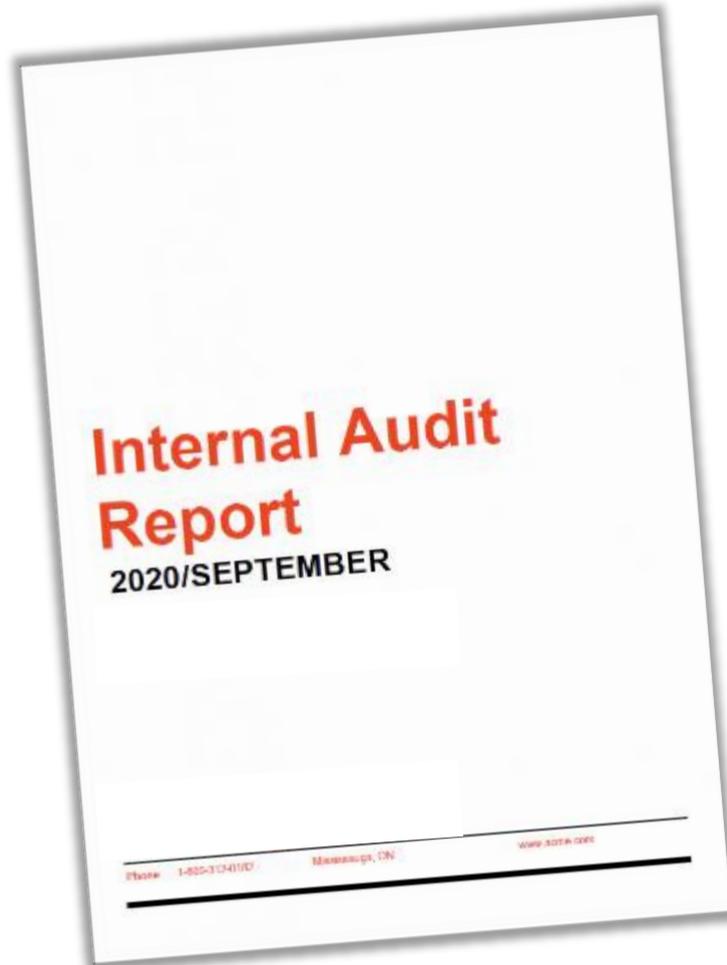


SUPERVISION						
Action	Target Date	Person(s) Accountable	Alert Lvs	# of Days Remaining	Completion Date	Status Updates
Review Account created (for e-procurement) (http://accounts.comcast.com/procurement/)	10-Jul-17	VP Paul	17	17		
Request Units from Operations Coordinator	10-Jul-17	VP Paul	17	17		
Determine which portfolio Account falls under Operationally	complete	VP Paul	-	-		
Order Blackberry/Radix	10-Jul-17	VP Paul	17	17		
Order songs for for Manager	10-Jul-17	VP Paul	17	17		
Order Time Clock/Biometric hand scanner	10-Jul-17	VP Paul	17	17		
Purchase personal protective equipment	10-Jul-17	VP Paul	17	17		
Office & Supplies for Client	10-Jul-17	VP Paul	17	17		
Order desk, chair, filing cabinet etc.	10-Jul-17	VP Paul	17	17		
Review/Obtain work log, ensure with IT on required options	28-Jul-17	VP Paul	17	17		
Ask Operations (for details)	28-Jul-17	VP Paul	17	17		
Set up OPERATIONS Report	01-Aug-17	VP Paul	17	17		
Standard Operations Manual	10-Jul-17	VP Paul	17	17		
Review/Update & MMS	26-Jul-17	VP Paul	17	17		
Janitor Dept. Set Up	26-Jul-17	VP Paul	17	17		
Weekly Cycle Cleaning Program	01-Aug-17	VP Paul	17	17		
Monthly Cycle Cleaning Program	01-Aug-17	VP Paul	17	17		
Project Cleaning Schedule	01-Aug-17	VP Paul	17	17		
Provide ing teams with wage and hour worksheets, supply budgets etc...	10-Jul-17	VP Paul	17	17		
Review Inventory	25-Jul-17	VP Paul	17	17		
Schedule Start	17-Jul-17	VP Paul	17	17		
Event station - label equipment	28-Jul-17	VP Paul	17	17		
Set up for Client Control System	28-Jul-17	VP Paul	17	17		
Set up for Log	10-Jul-17	VP Paul	17	17		
COST CONTROL						
Action	Target Date	Person(s) Accountable	Alert Lvs	# of Days Remaining	Completion Date	Status Updates
Review Janitor and Storage rooms, hallways, door openings etc to ensure proposed equipment makes sense	10-Jul-17	VP Paul	17	17		
Review expenses and supplies needed (Paper Towels, Toilet tissue, plastics, cleaning chemicals)	10-Jul-17	VP Paul	17	17		
Order Large Capital Equipment	10-Jul-17	VP Paul	17	17		
Order Smallware Items-Vacuums, carts etc.	07-Jul-17	VP Paul	17	17		
Budget Preparation	Completed	VP Paul	-	-		
Budget Confirmation - Startup Budget/Review projected costs with Opt team)	Completed	VP Paul & GM	-	-		
Review Financials/Review cost of log, full schedule	07-Jul-17	VP Paul & GM	17	17		
Set up Hours/Vacation Report	03-Jul-17	VP Paul & GM	17	17		
Review Wage Schedule	10-Jul-17	VP Paul & GM	17	17		
Payroll Schedule for U of O	14-Jul-17	VP Paul / Payroll Dept	17	17		
Set up Supply Order Procedure	15-Jul-17	VP Paul	17	17		
Inventory Control Procedure	15-Jul-17	VP Paul	17	17		
Setup Supply and Equipment rooms	10-Jul-17	VP Paul	17	17		
Review Equipment	17-Jul-17	VP Paul	17	17		
Asset List & Serial Numbers	17-Jul-17	VP Paul	17	17		
Label Equipment & Review Manuals	17-Jul-17	VP Paul	17	17		
SUPPORT TEAM						
Action	Target Date	Person(s) Accountable	Alert Lvs	# of Days Remaining	Completion Date	Status Updates
Determine Startup team	01-May-17	VP Paul	done	done	24-May-17	
Determine Startup team schedule	02-May-17	VP Paul	done	done	01-Jun-17	
Book hotel and travel arrangements	15-Jul-17	Admin	17	20		

40+ personnel

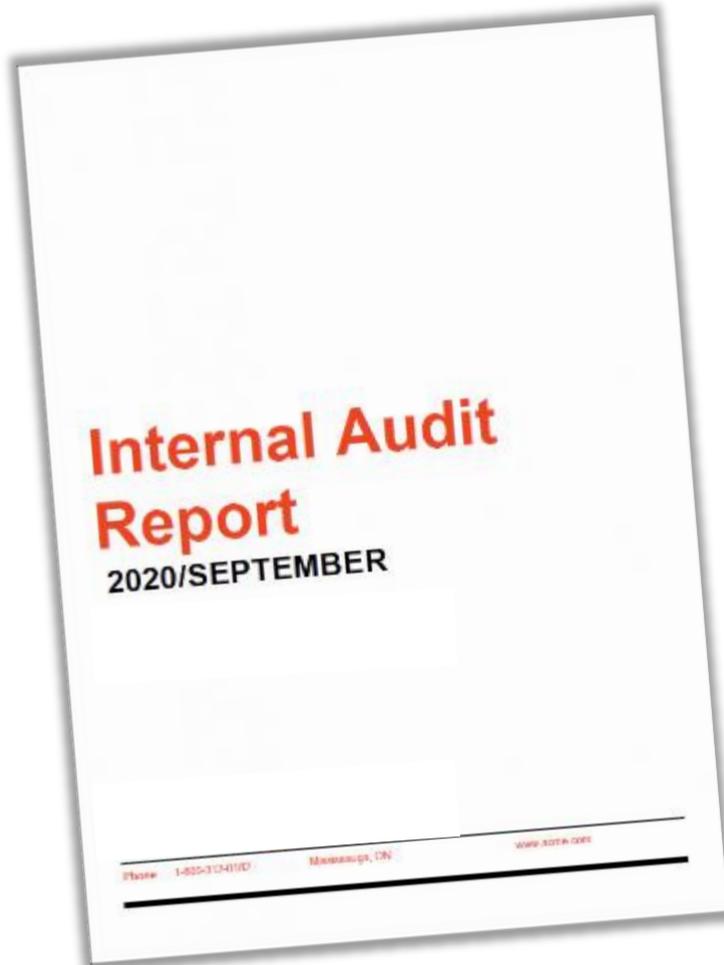
Reports

Reports

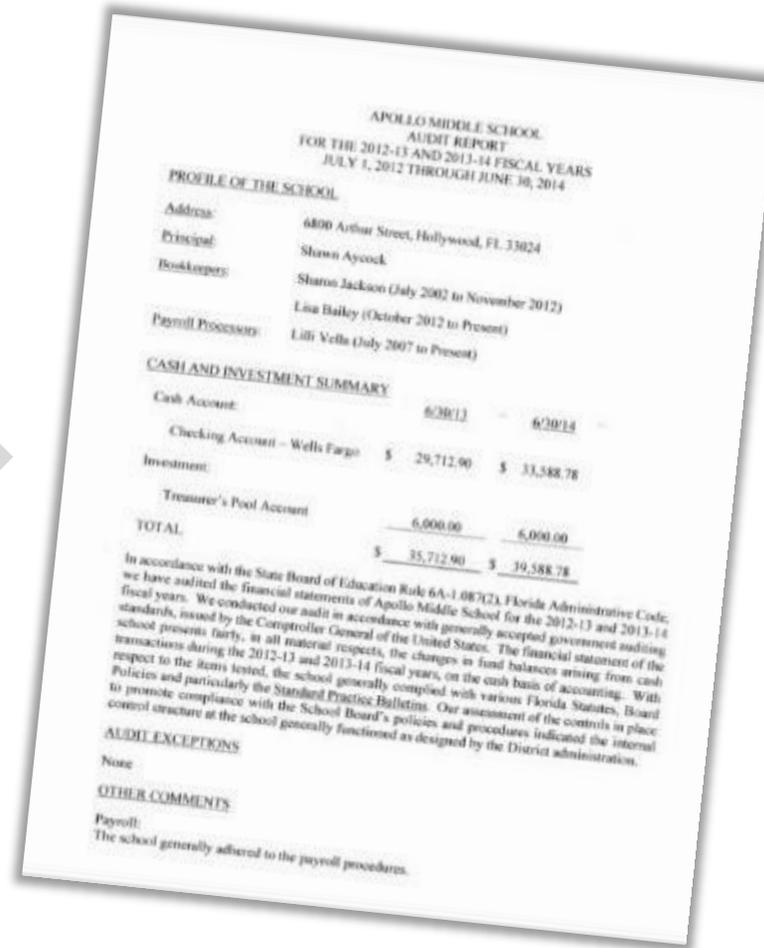


17-Page Report

Reports



17-Page Report



34-Page Report

Case Study

(High Tech Facility - \$ Billion)

Case Study

(High Tech Facility - \$ Billion)

Contents included:

1. Cost
2. BIM Experience
3. Capacity
4. Innovation
5. Prefab
6. CX, QA, QC Processes
7. Management Approach
8. GMP Management
9. Cost Control Approach
10. Similar Experience
11. Contract Exceptions
12. Goals
13. KPI
14. Insurance
- 15. Safety Plan**

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Time Spent Evaluating: *Deviation in Safety Plan Score:*

2.5 Weeks

1.52%



Definition of the “Best” Evaluation Criteria

1) Speed

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ability to Quickly Review all material

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1) Speed

ability to Quickly Review all material

2) Differentiation

justify which material gets a better/worse score

4 Core Factors

1. *Financial Proposal (Cost)*
2. *Local preferences / policies (if applicable)*
3. *Written Proposal*
 - *Experience*
 - *Risk / Innovation*
 - *Methodology*
4. *Presentation / Demo / Interview (optional)*

RFP

Request for Proposal



Information Technology (IT)
Software Implementation Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

Goal:
Become a
“Client of Choice”

A “Client-of-Choice” (“Customer-of-Choice”)

- Suppliers/Vendors/Contractors want to work for you over other owners
- Clients-of-Choice get vendors’ **best teams (experts)** on their projects
- Vendors spend the time to put together an **accurate proposal**
- Client-of-Choice personnel know how to **behave with experts**
- Client-of-Choice has an owner “team” that is **trained and prepared** to work in a high performing delivery environment

Using Expertise

- Is there anything you'd do differently?



Innovative Ideas

“Mishap”





Asking the Right Questions

- **Supplier proposed an alternative procedure** (different from specified process) **for removing damaged steel panels that was:**
 - *Cheaper*
 - *Faster*
 - *Safer*



Final Outcomes

- Finished **ahead of schedule**
- **0 change orders** or cost increases
- Client saved **60% in cost**



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

Last week! →

17
Oct

21
Nov

19
December

 Add to Calendar

 Add to Calendar

 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



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



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

How can highly qualified suppliers simultaneously offer cheaper costs? We'll cover



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?

Jake.Smithwick@charlotte.edu