

# Five Ways to Adopt Best Practices in your Next RFP



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

[Jake.Smithwick@charlotte.ed](mailto:Jake.Smithwick@charlotte.ed)

**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**  
With The State of Tennessee

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**SURVEY RESULTS**

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- 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 of TN handles the procurement process

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

**COMPARISON**  
The following table provides a comparison of the State of Tennessee's procurement process to other public agencies. The data was collected from a survey of 30 public agencies.

CRITERIA	STATE OF TN	3 PUBLIC AGENCIES
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2. The procurement process is fair	31%	69%
3. The Organization is more concerned about lowest cost rather than overall value	75%	69%
4. Overall satisfaction with the way the State of TN handles the procurement process	42%	77%
5. Overall satisfaction with other Owners they work for	80%	77%
6. Transparency of vendor selection process	31%	69%



*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



### Information Technology (IT) Software Implementation Template

RFP Number: #####

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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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How the Client will Score & Award

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General Instructions, Dates & Contact

6 Proposal Forms

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Forms for Vendors to Complete

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Supplemental Information



Center for Procurement Excellence

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Supplemental Information

# Simple Things To Consider

# Attracting Suppliers

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



# Registration

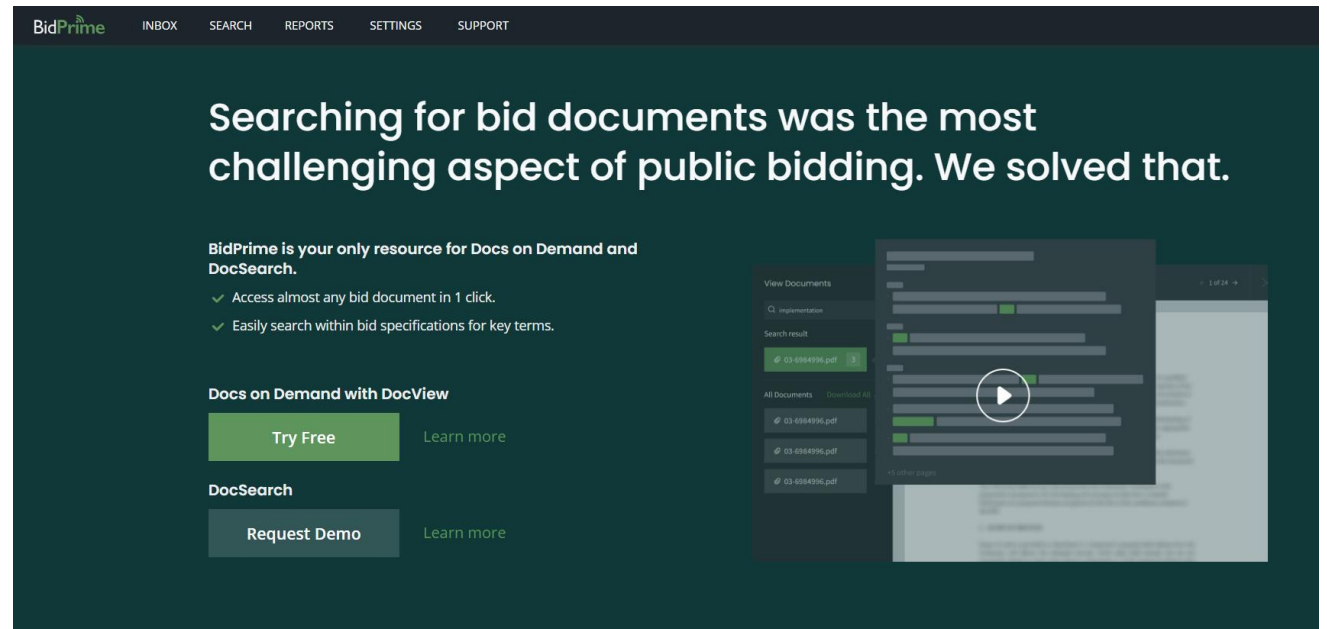


- How many agencies have their own eProcurement system?
- Local firms may be registered with the State's system
- Larger/National firms cannot afford to register with every Public organization across the country

# National Solicitation Warehouse

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

BidPrime





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



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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...

Download All

# 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...](#)  
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[2101347.ContractSa...](#) [2101347.Addendum...](#) [2101347.Administrat...](#) [2101347.Solicitation...](#) [2101347.Administrat...](#) [GLWA-2022-2026-CI...](#) [GLWA-2022-2026-CI...](#)

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### More Info:

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

# Which File Contains The RFP?

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

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

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

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

[Download All](#)

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

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

# Attracting Suppliers

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



# Don't Make It Difficult To Read

**APPENDIX E – PROJECT DESCRIPTION**

**AUDIT AND ACCOUNTABILITY FUND**

Service Delivery and Modernization Review of Development Review

**Project Purpose**

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

**Project Objective**

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

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

**Background**

**Audit and Accountability Fund**

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

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

**Project Selection**

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

**City of Kitchener Development Services Review**

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

**Appendix A – Registration Form**

TO : Independent Electricity System Operator

FROM : [Insert Name of Proponent]

RE : Fairness Advisor Services

Password

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

Enter Password:

OK Cancel

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

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

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

# Attracting Suppliers

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

# Respond to 20 Items...

## Requested Information:

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

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

# Respond to 20 Items...

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

### Requested Information:

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

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

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







# Attracting Suppliers

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

# Most Important Items To The Supplier?

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



# Most Important Items To The Supplier?

- ✗ Definitions
- ✗ Prohibited Communication
- ✗ Rights of the Client
- ✗ Rights to Clarify
- ✗ Conflict of Interest
- ✗ Unethical Conduct
- ✗ Terms and Conditions of the RFP
- ✗ Security Checks
- ✗ 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



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***

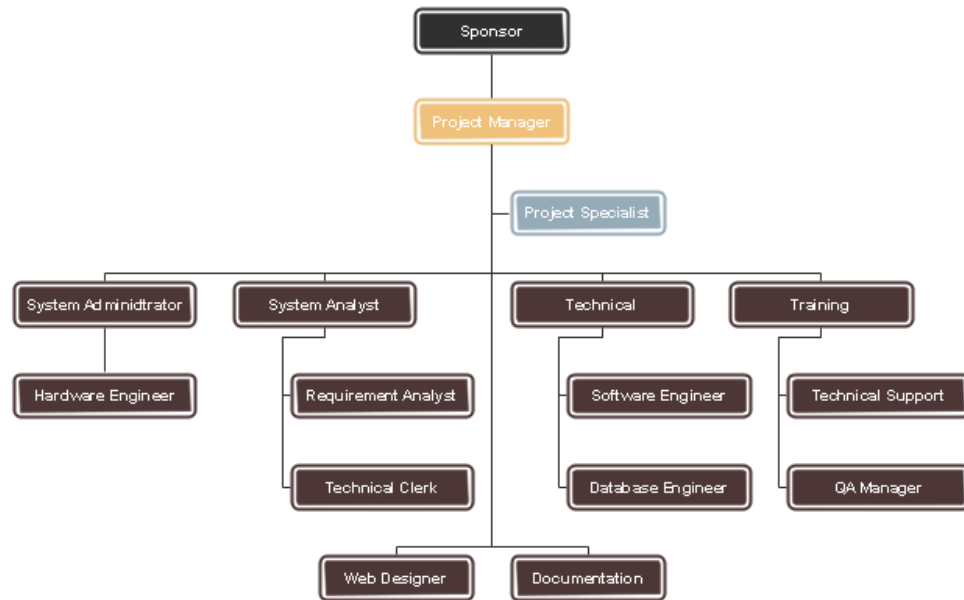


***...But We  
Can't Totally  
Miss The  
Target!!!***

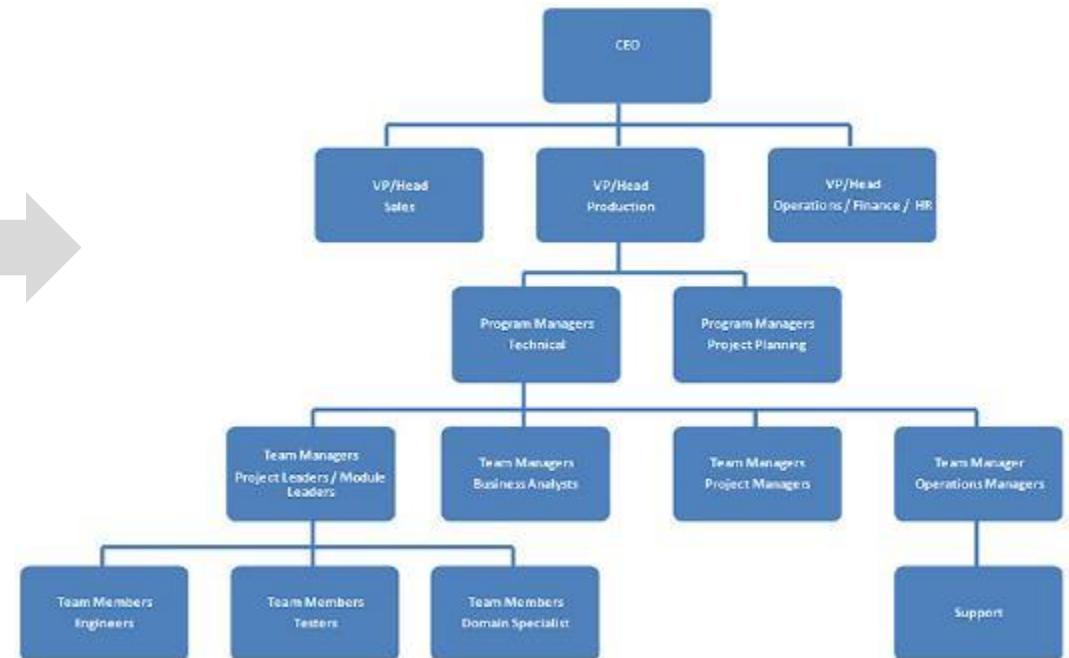
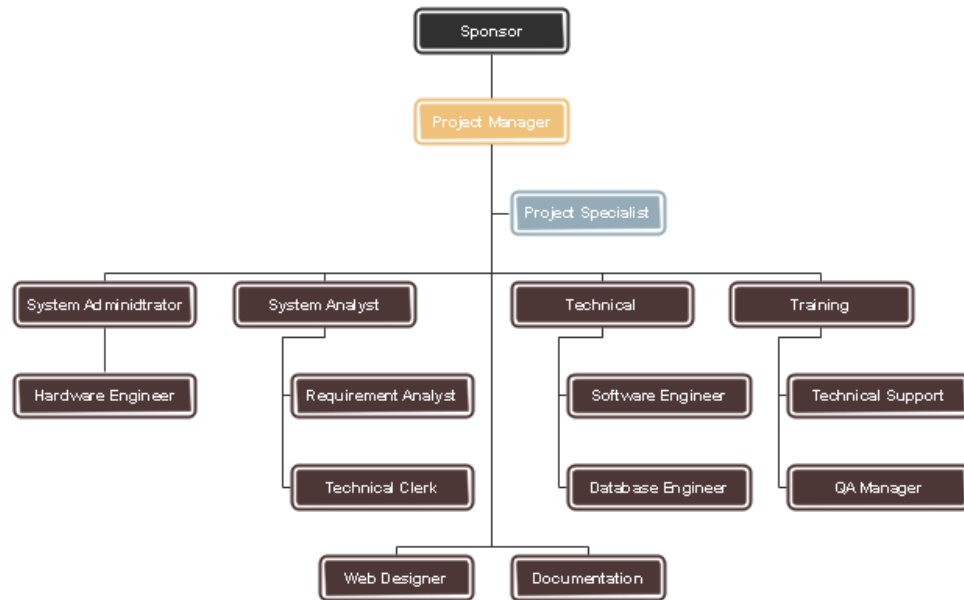
# How Will You Actually Evaluate This Information?

# 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	0	0	0	0
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						3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
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																												
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																												
Software Tester	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
Functional Lead																												
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

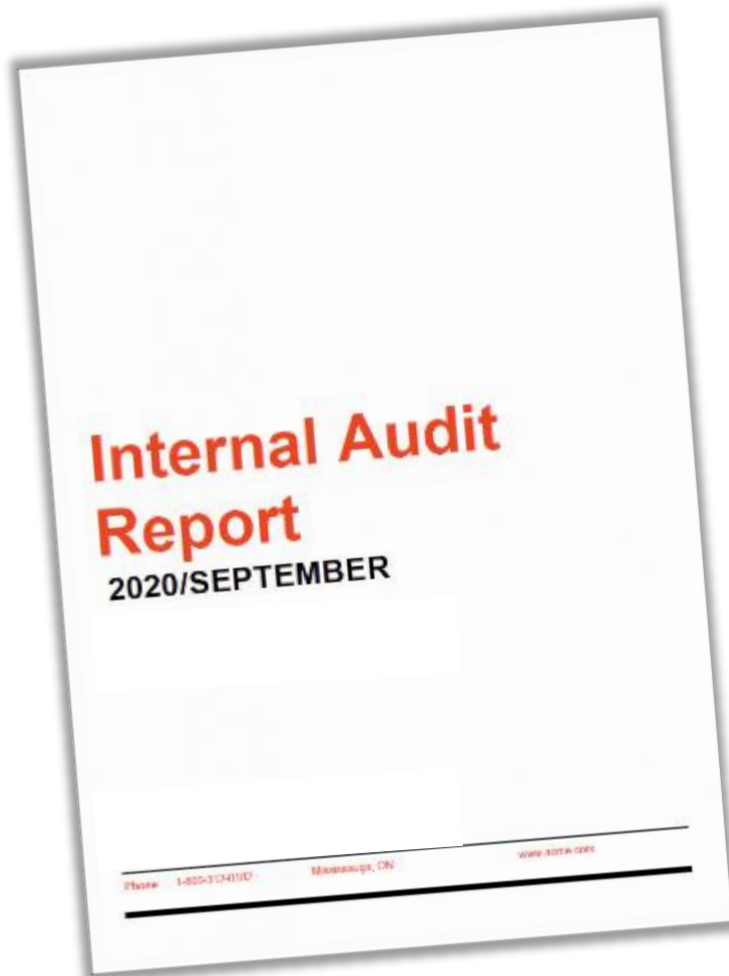


Supervision	Target Date	Person(s)	Accountable	Alert	Lead	# of	Days	Remainder	Completion Date	Status	Updates
Action	Target Date	Person(s)	Accountable	Alert	Lead	# of	Days	Remainder	Completion Date	Status	Updates
Request Account created (for entire team) - <a href="https://accounts.researchcanada.ca/jsp/verify/">https://accounts.researchcanada.ca/jsp/verify/</a>	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Request Under from Operations Coordinator	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Determine which portfolio Account falls under Operational	complete	VP	VP	10	17	17	17	17	17	17	17
Order BlackBerry/Radios	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Order computer for Manager	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Order Time Clock/Biometric hand scanner	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Purchase personal protective equipment	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Office & Supplies for Client	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Order desk, chair, filing cabinet etc.	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Place/Order new Up. Issues with IT on triggered options	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Set up Operations Report	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Standard Operations Manual	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Review/Update & MMS	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Initial Client Set Up	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Weekly Cycle Cleaning Program	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Monthly Cycle Cleaning Program	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Project Closing Schedule	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Provide ing team with wage and hour worksheets, supply budgets etc.	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Review Inventory	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Schedule Staff	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Event support - label equipment	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Set up Review Control System	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Set up Run Log	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Cost Control	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Action	Target Date	Person(s)	Accountable	Alert	Lead	# of	Days	Remainder	Completion Date	Status	Updates
Review Janitor and Storage rooms, hallways, door openings etc to ensure proposed equipment makes sense	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Review dispenser and supplies needed (Paper Towels, Toilet tissue, plastics, cleaning chemicals)	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Order Large Capital Equipment	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Order Smallware Items-Vacuums, carts etc.	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Budget Preparation	Completed	VP	VP	10	17	17	17	17	17	17	17
Budget Confirmation - Startup budget/Review projected costs with Opt team	Completed	VP	VP	10	17	17	17	17	17	17	17
Review Financials/Review and update full schedule	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Set up Hours Worksheet Report	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Review Wage Schedule	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Payroll Schedule for U of O	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Set up Supply Order Procedure	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Inventory Control Procedure	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Setup Supply and Equipment rooms	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Review Equipment	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Asset List & Serial Numbers	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Label Equipment & Review Manuals	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Support Team	10-Jul-17	VP	VP	10	17	17	17	17	17	17	17
Action	Target Date	Person(s)	Accountable	Alert	Lead	# of	Days	Remainder	Completion Date	Status	Updates
Determine Startup team	01-May-17	VP	VP	10	17	17	17	17	17	17	17
Determine Startup team schedule	01-May-17	VP	VP	10	17	17	17	17	17	17	17
Book field and travel arrangements	15-Jul-17	Admin	Admin	10	17	17	17	17	17	17	17

40+ personnel

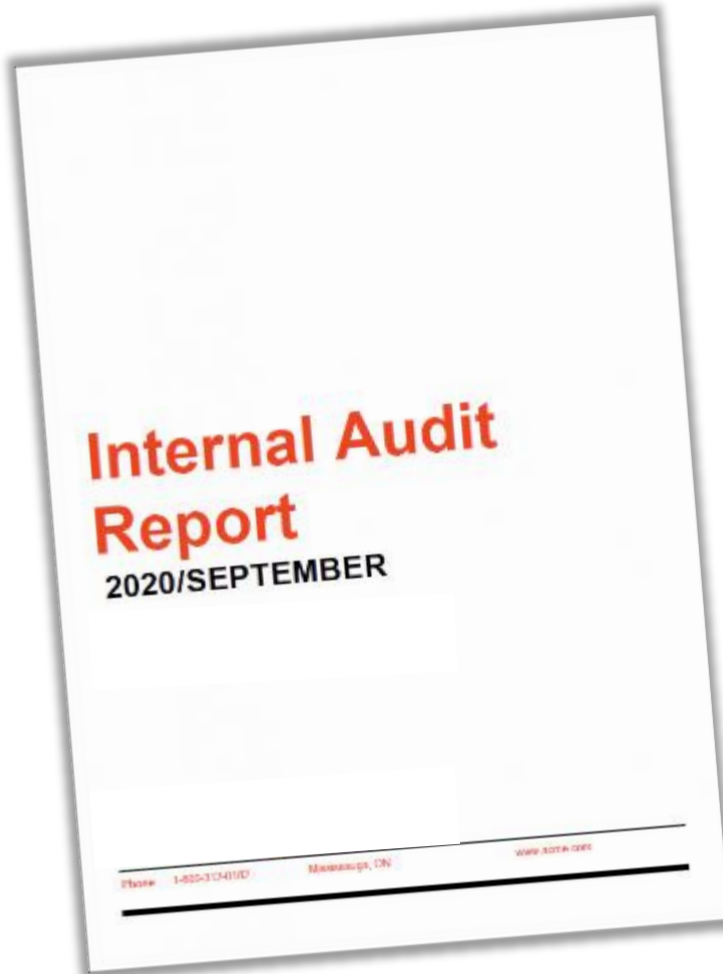
# Reports

# Reports



17-Page Report

# Reports



17-Page Report

The image shows the front cover of an audit report for Apollo Middle School. The title "APOLLO MIDDLE SCHOOL AUDIT REPORT FOR THE 2012-13 AND 2013-14 FISCAL YEARS JULY 1, 2012 THROUGH JUNE 30, 2014" is at the top. Below it is a "PROFILE OF THE SCHOOL" section with details on address, principal, bookkeepers, and payroll processors. This is followed by a "CASH AND INVESTMENT SUMMARY" table comparing 6/30/13 and 6/30/14 figures for cash accounts, investments, and a total. A paragraph of text follows, and then sections for "AUDIT EXCEPTIONS" and "OTHER COMMENTS".

CASH AND INVESTMENT SUMMARY		
Cash Account:	6/30/13	6/30/14
Checking Account - Wells Fargo	\$ 29,712.90	\$ 33,588.78
Investment:		
Treasurer's Pool Account	6,000.00	6,000.00
TOTAL	\$ 35,712.90	\$ 39,588.78

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

# 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





# Case Study

(High Tech Facility - \$ Billion)

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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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## 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”









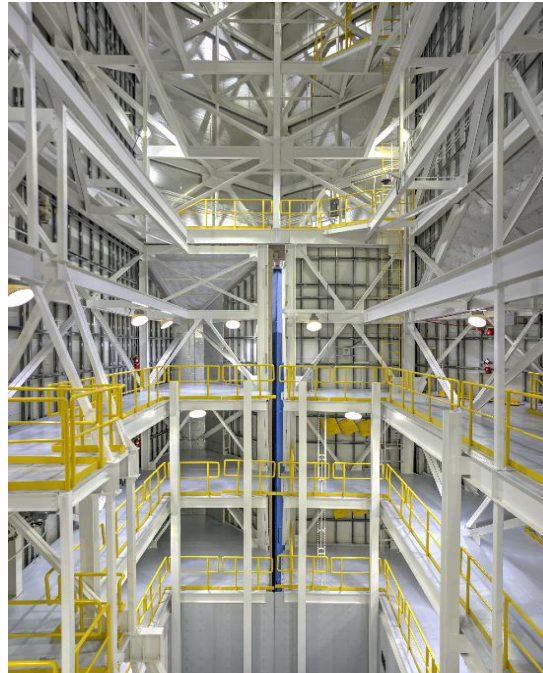
# Asking the Right Questions

- **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

**3<sup>rd</sup> Thursdays every month**  
**@ 12pm Central**

*15-min Teaching Moment*

(learn a new tip, trick, or tool)

*30-min Virtual Peer Group*

(network with professionals)

*Office Hours*

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



# Previous Recordings Available Online!

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

April 15, 2021



Simpliar's Evaluation  
Criteria to Minimize  
Budget Risk

May 20, 2021



Current State of Practice  
In Software RFPs

June 17, 2021



How to do Market  
Research More  
Effectively

July 15, 2021



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

August 19, 2021



The Value of  
Debriefings

September 16, 2021



Handling Large IT  
Hardware Buys  
With Different Scope Packages

October 21, 2021



Vendor of  
Record Programs

November 18, 2021



7 Most Deadly  
Marketing Phrases

December 16, 2021



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

January 20, 2022



Best Practices for  
Evaluator Training

February 17, 2022



Got RFP Soft Skills?

March 17, 2022



[center4procurement.org](https://center4procurement.org)

Last week! →

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

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

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



# Upcoming Topics!

Register at: [center4procurement.org/rfp-doctor](https://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](mailto:Jake.Smithwick@charlotte.edu)