



## **Alternative Construction Delivery Methods and High-Performing RFPs: A Guide for Procurement Professionals**

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

## OUR MISSION

The Center for Procurement Excellence (CPE) mission is to improve the effectiveness of public and private procurement worldwide, through:

- Education and training of professionals in the procurement and delivery of goods and services
- Promoting excellence in the solicitation aspects of the procurement profession
- Standardizing procurement practices and solicitation practices
- Advocating for global improvements for advancement to procurement policy



# Simplar

- Consultancy, Research, OCM, and Trainers
- Expertise with **all parties** (owners & vendors)
- Provide **consulting, tools, training** for:
  - Procurement & Sourcing
  - Project Delivery
  - Organizational Readiness & Transformation
  - Risk-based Partnering & Planning
  - Project & Risk Management, Project Controls
  - Performance Measurements



# Simplr

- Becoming a **Client of Choice**
- Becoming a **Performance-Based Vendor**
- Other things:
  - Industry Benchmarking
  - Human Dimensions/Team Optimization
  - Talent Development
  - Workforce Studies
  - Exploratory research
  - Policy & Regulations
  - Standards & Templates



20+ Years | 170+ Owners

3,500+ Projects | \$20+ 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

Google



Georgia-Pacific

TREMCO



IFMA™

International Facility Management Association  
Empowering Facility Professionals Worldwide



NUCOR



LAWA  
LOS ANGELES WORLD AIRPORTS

evergy

NECA  
NATIONAL ELECTRICAL CONTRACTORS ASSOCIATION

Environment  
Protection  
Authority Victoria

NASPO



CPWR  
THE CENTER FOR CONSTRUCTION  
RESEARCH AND TRAINING



NCHRP

uOttawa

VCU Health



Kiewit



Children's Mercy  
HOSPITALS & CLINICS  
Kansas City



BAYLOR  
UNIVERSITY

Brooklyn  
Park



NATIONAL ACADEMY OF SCIENCES

Western  
UNIVERSITY · CANADA

Seattle City Light



Banner Health



BRITISH  
COLUMBIA



LEDUC  
COUNTY



The City of  
SPRUCE GROVE  
[www.sprucegrove.org](http://www.sprucegrove.org)



SFU



UCI



DALHOUSIE  
UNIVERSITY  
Inspiring Minds



UNIVERSITY OF  
SASKATCHEWAN

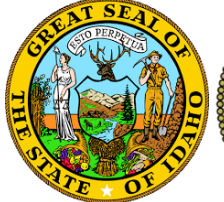


Kansas City Kansas  
Community College



THE  
Water  
Research  
FOUNDATION

Mercy+



WADDELL  
& REED

electrical training  
IBEW - NECA ALLIANCE

BEST VALUE  
EUROPE



City of Lawrence  
KANSAS



COMPASS  
GROUP



UNIVERSITY OF CALIFORNIA  
UC RIVERSIDE

# Alternative Construction Delivery Methods & High- Performing RFPs





# Agenda

- Recap of the different delivery methods
- Which delivery method is the best?
- Becoming a client of choice
- High Performing RFP
- Great Resources at the End!!!

# Project Delivery Method

- Comprehensive process by which a facility is designed and constructed for an owner.
  - From project scope definition, through design & construction, to project closeout & startup
- Also Known as:
  - Alternative Contracting Methods (ACMs)
  - Alternative Project Delivery Methods (APDMs)
  - Project Delivery Methods (PDMs)
  - “Systems” rather than “Methods”, e.g. Project Delivery Systems

# Common Delivery Methods

- Design Bid Build (DBB) → goes by many names... traditional, low bid, hard bid, rip-and-read, bid build etc
- Alternative Project Delivery Methods (APDMs) a.k.a. Alternative Contracting Methods (ACMs)
  - Design Build (DB), Progressive Design-Build (PDB), Construction Manager as Agent (CMa), Construction Manager at Risk (CMAR) or Construction Manager/General Contractor (CM/GC), Integrated-Project-Delivery (IPD)
- Overlooked, but technically Alternative
  - Multi-prime (more common in private sector than public)
  - On-Call or Job Order Contracting (JOC) a.k.a. Standing Order, Roster, Pre-Qualified List, IDIQ, etc

# 4 Key attributes of a delivery method:

## 1. Contractual relationships between stakeholders

- Who signs with who? (mainly at the prime level with the owner)
- Eg. DBB vs DB vs CMAR vs multi-prime

## 2. Financial clause of the contract

- How are the commercial terms of the contract arranged?
- How will the stakeholders be paid?
- Eg. Lump Sum/Fixed Price, GMP, Unit Price, Cost Plus, Cost Reimbursable, etc.

# 4 Key attributes of a delivery method:

## 3. Timing of stakeholder involvement

- When is each party coming on board?
- The owner's decision
- This is not just when the contractor is hired but also the design team
- Typically measured in terms of % design completion:
  - CMAR → CM hired 0%-99% design
  - DB with bridging → both designer & contractor could be hired at 15-30% design or scope
  - PDB → at 0% design

## 4. Selection approach (procurement) of stakeholders

- How the owner selects their design & construction partners?
- Eg. Low-bid (price only), QBS (qualification only, no price), and Best Value (everything in between- lots of variety)

# A note on terminology:

- Many different terms are used in the industry by different sectors (depends on who you talk to)
  - Eg. transportation sector uses Alternative Contracting Methods (ACM) instead of Alternative Project Delivery Methods (APDM)
  - They use D-B-B instead of DBB (dashes)
  - From terms to abbreviations terminology varies considerably
- A common fallacy is mixing the name of the project delivery method with one of the 4 key elements (mostly the selection/procurement method and the contract type)  
Eg. low bid being intermixed with DBB or GMP being mixed with DB
- Lots of variety out there! How the owner selects matters!

# Design-Bid-Build (DBB)

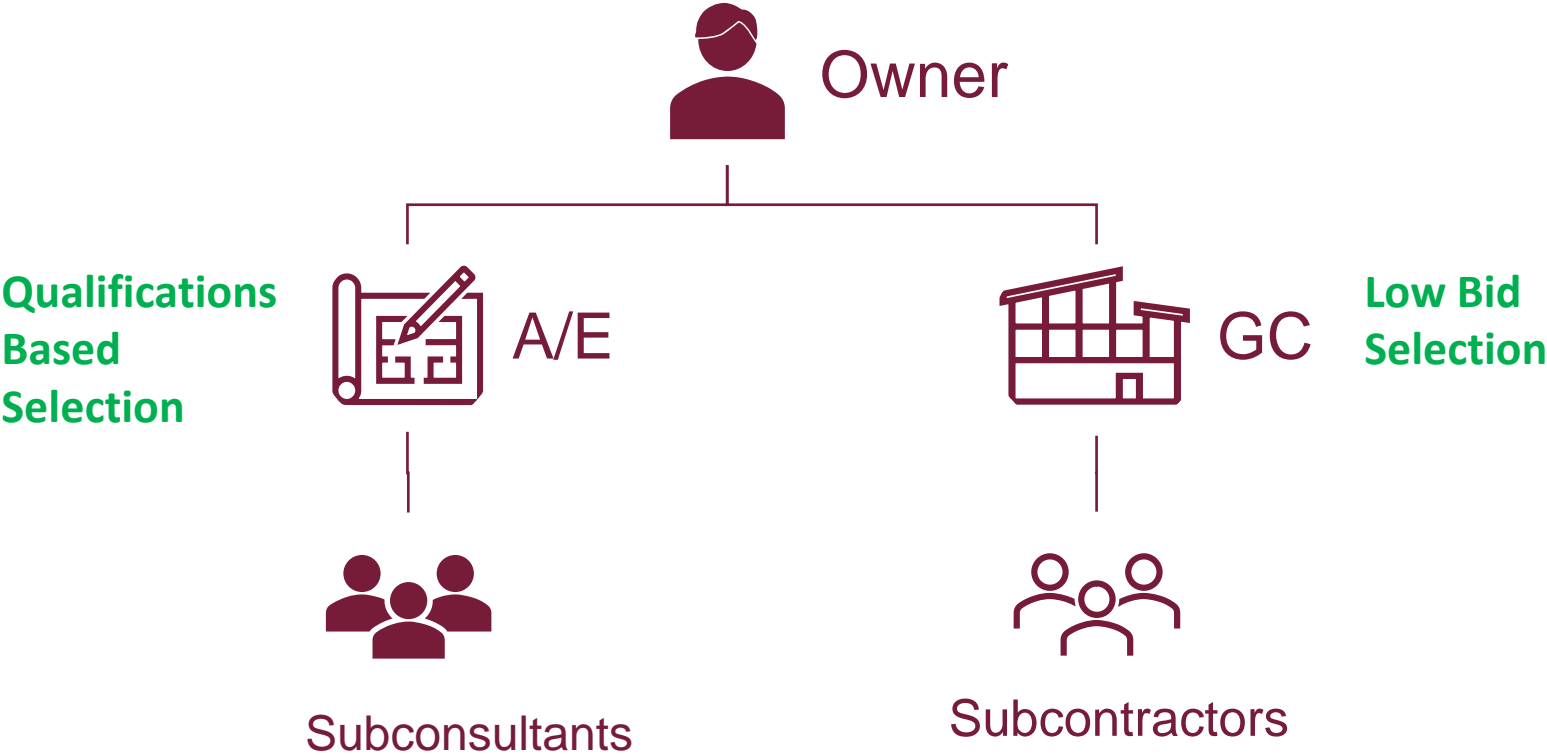
# Traditional Method (Design-Bid-Build)

- Also known as hard money or Competitive bid contract (most commonly “plan & spec”).
- Has three sequential phases
  - Design – Bid – Construction
  - Design is 100% done before the contractor comes in





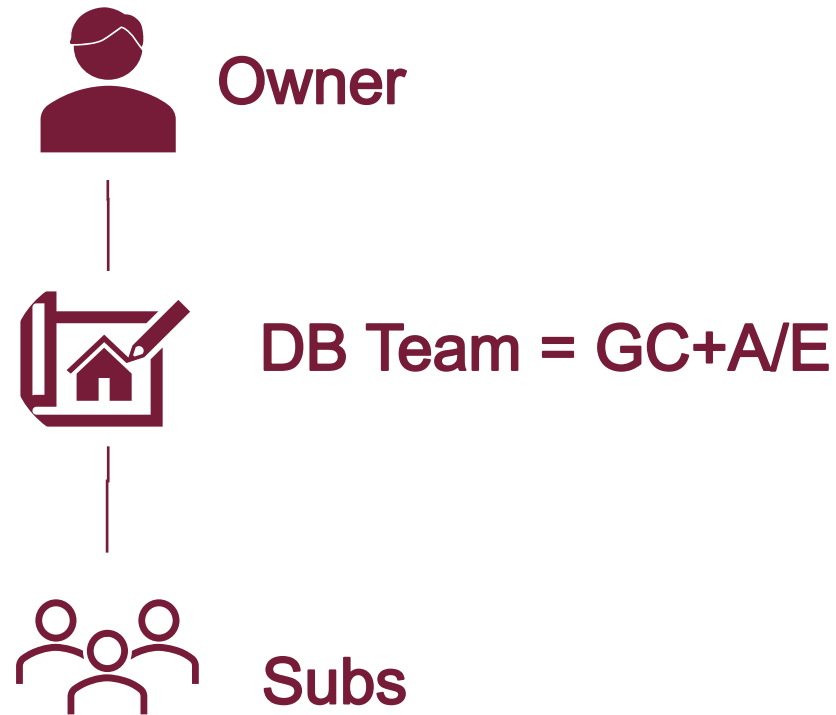
# Design-Bid-Build (DBB)



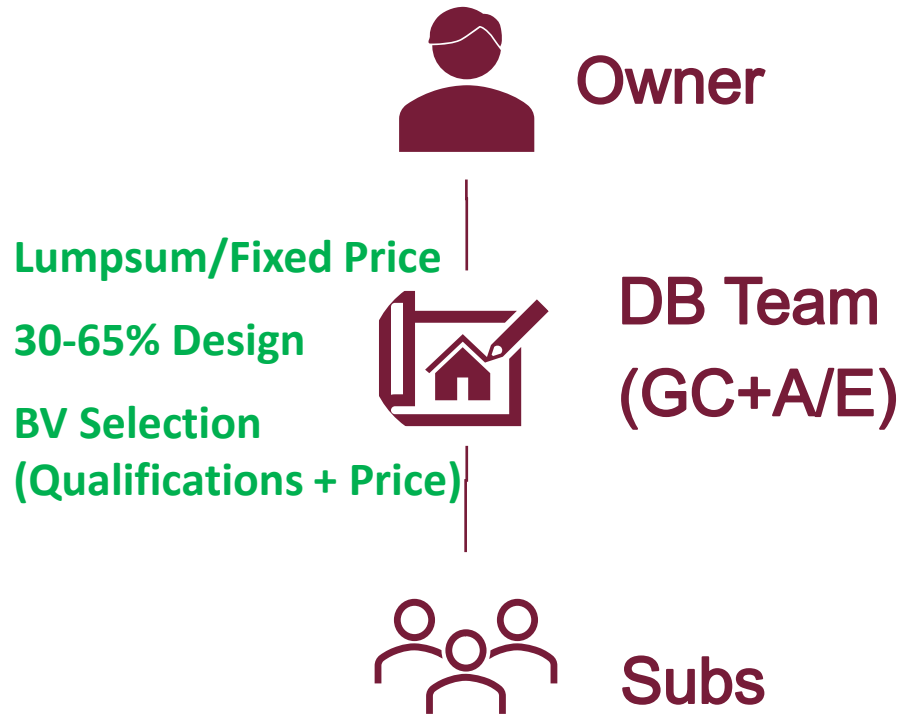
# Design-Build (DB)

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- Single firm responsible for both design and construction.



# Traditional Design-Build (DB)

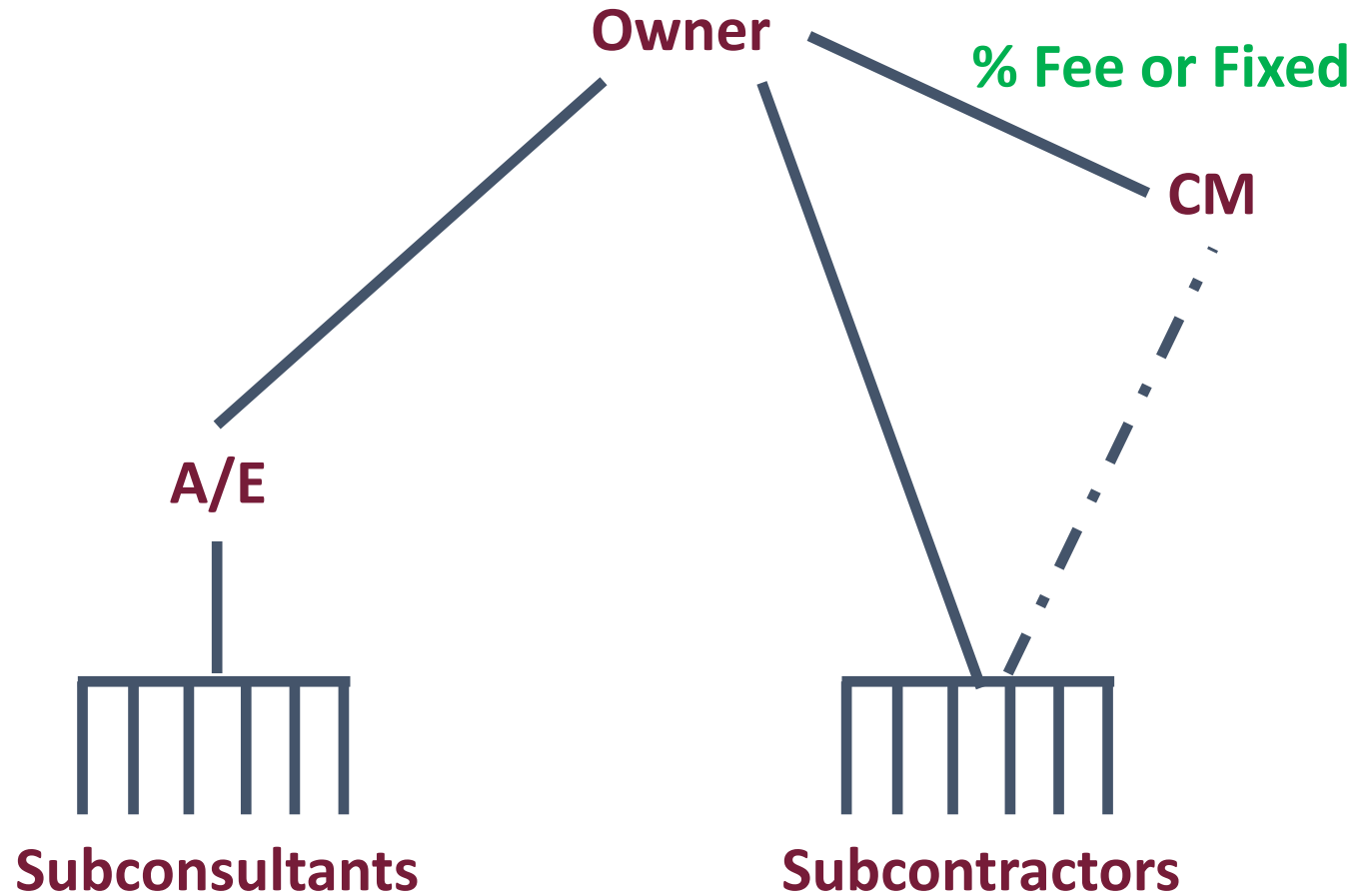


# Progressive Design-Build (PDB)

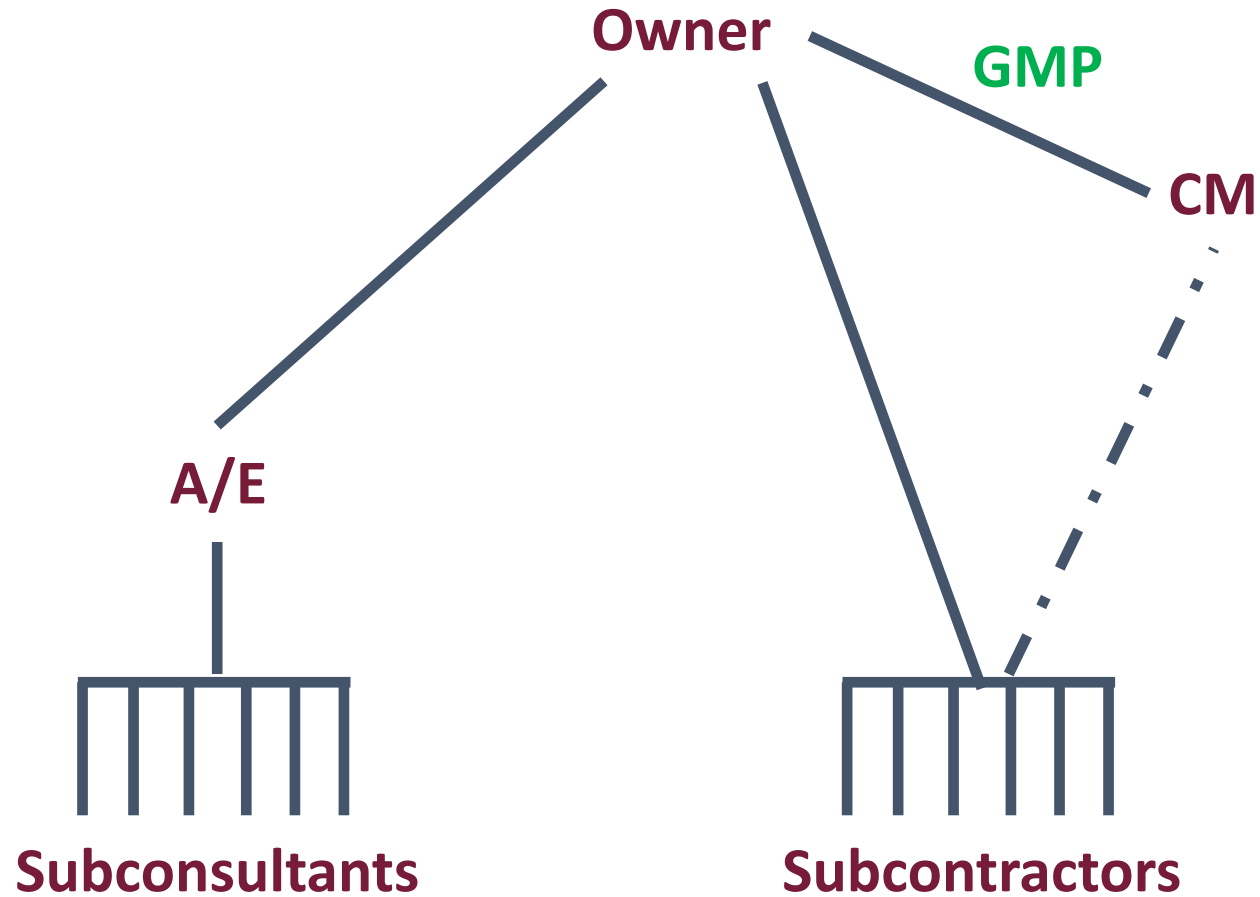


# Construction Manager as Agent (CMa)

# Construction Manager as Agent



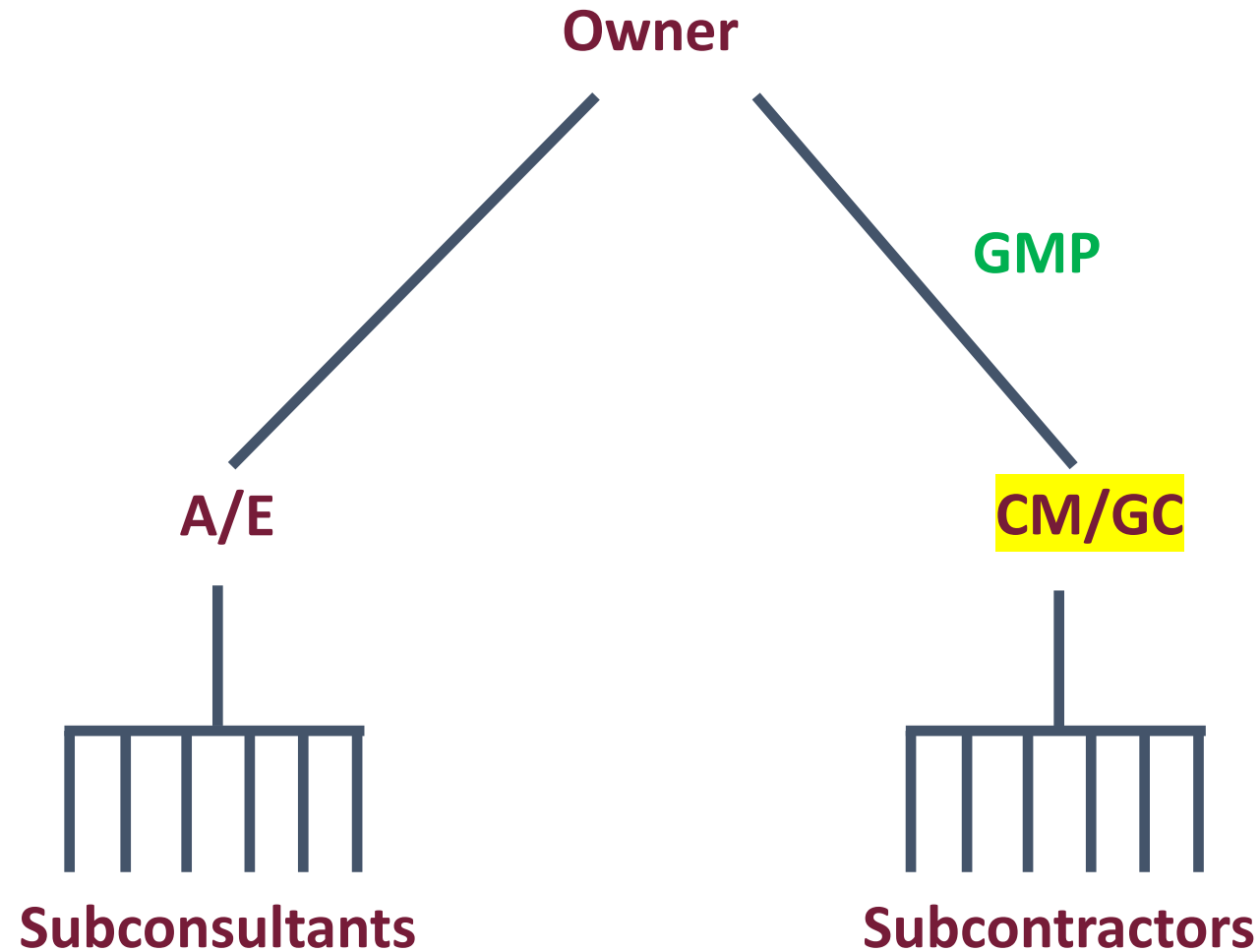
# Construction Manager as Agent



# Construction Manager at Risk (CMAR)



# Construction Manager as Agent with a GMP



# Biggest Challenges

# Challenges on the Owner's side

## 1. Owners do not treat the components of a delivery system as 4 distinct decisions.

Eg. I want to do DBB which means Low Bid

I want to do DB which means I'll make the designer and contractor team up!

**Best Practice:** Each decision should exist on its own

## 2. Most owners do not look at their own internal maturity model, at a personnel level.

- Owner assumes all internal personnel can do it – Not True!!!
- The more advanced a project and a delivery system gets, the probability of the owner group messing it up gets higher.

**Best Practice:** treat alternative delivery as an organizational change initiative with supporting training, measurement etc

# Challenges cont'd

## **3. Owners do not realize that alternative delivery is often a hyper low bid environment which is HATED by the subcontractor community**

- Most sub selection practices by CMARs and DBs are turned around to be low bid (with incomplete design)

## **4. Owners overlook the importance of sub selection in optimal manner**

- Simplar has done BV sub selections in CMAR and DB → one of the best projects in Google's entire portfolio
- Also done BV selection of key players in a DB project (Arch, Struc, Mech, Elec) all separately competed and teamed up – they loved it in end

# Challenges cont'd

## **5. Owners bungle the fee competition portion of early design (<30% design) projects.**

- Lots of game-playing if the owner doesn't define fee vs. overhead vs. indirect vs. direct costs

## **6. The industry struggles to communicate best practices during a project.**

- Some owners hope they will be “coached up” by their industry partners - rarely successful!
- Being a successful CMAR is not the same as being a good professional teacher – being a CMAR is busy enough as it is!!!
- No time to hold the owner's hands!

Which is/are best?

# Built Environment Project Performance Research

- **Only 2.5%** of projects defined as successful (scope, cost, schedule, & business)
  - *PricewaterhouseCoopers*
- **Only 30%** of projects completed **within 10%** of the planned cost & schedule
  - *Construction Industry Institute Performance Assessment Committee*
- **24%** growth in owner's construction indirect costs since 1995 (net of inflation and escalation)
  - *Construction Industry Institute Performance Assessment Committee*

# Mega Project Performance

98

98% have cost overruns and delays

80

80% Average Overbudget

20

20-month average delay



# Summary of Average Differences Between Project Delivery Systems (CII-133)

Criteria	Design-Build vs. Design-Bid-Build	CM@R vs. Design-Bid-Build	Design-Build vs. CM@R vs.	Level of Certainty
Unit Cost	6.1% lower	1.6% lower	4.5% lower	99%
Construction Speed	12% faster	5.8% faster	7% faster	89%
Delivery Speed	33.5% faster	13.3% faster	23.5% faster	88%
Cost Growth	5.2% less	7.8% more	12.6% less	24%
Schedule Growth	11.4% less	9.2% less	2.2% less	24%

- Few projects – not standardized
  - (so cost is apples to oranges to pears)
- The data shows there is no difference in performance

# New Study – CII & CPF

- Not a significant difference between delivery methods
- Key difference makers
  - Qualifications based selection of project team
  - Involvement of key people earlier in project
  - Cost transparency on the project during construction

# So how to select a delivery method?

- Project delivery method is just a tool in your toolbox
  - 4 attributes each separately chosen to best suit the owner (industry will organize according to what the owner thinks)
- First follow your rules, laws, policies, etc...
- #1 with the highest correlation to project outcome is the procurement model.
  - Many owners struggle!!!
  - Needs to be treated most effectively
- Based on the combination of your project characteristics and your team (what they can handle)

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

# Are You Writing RFP's And Not Getting Enough Responses???



*If Vendors 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**



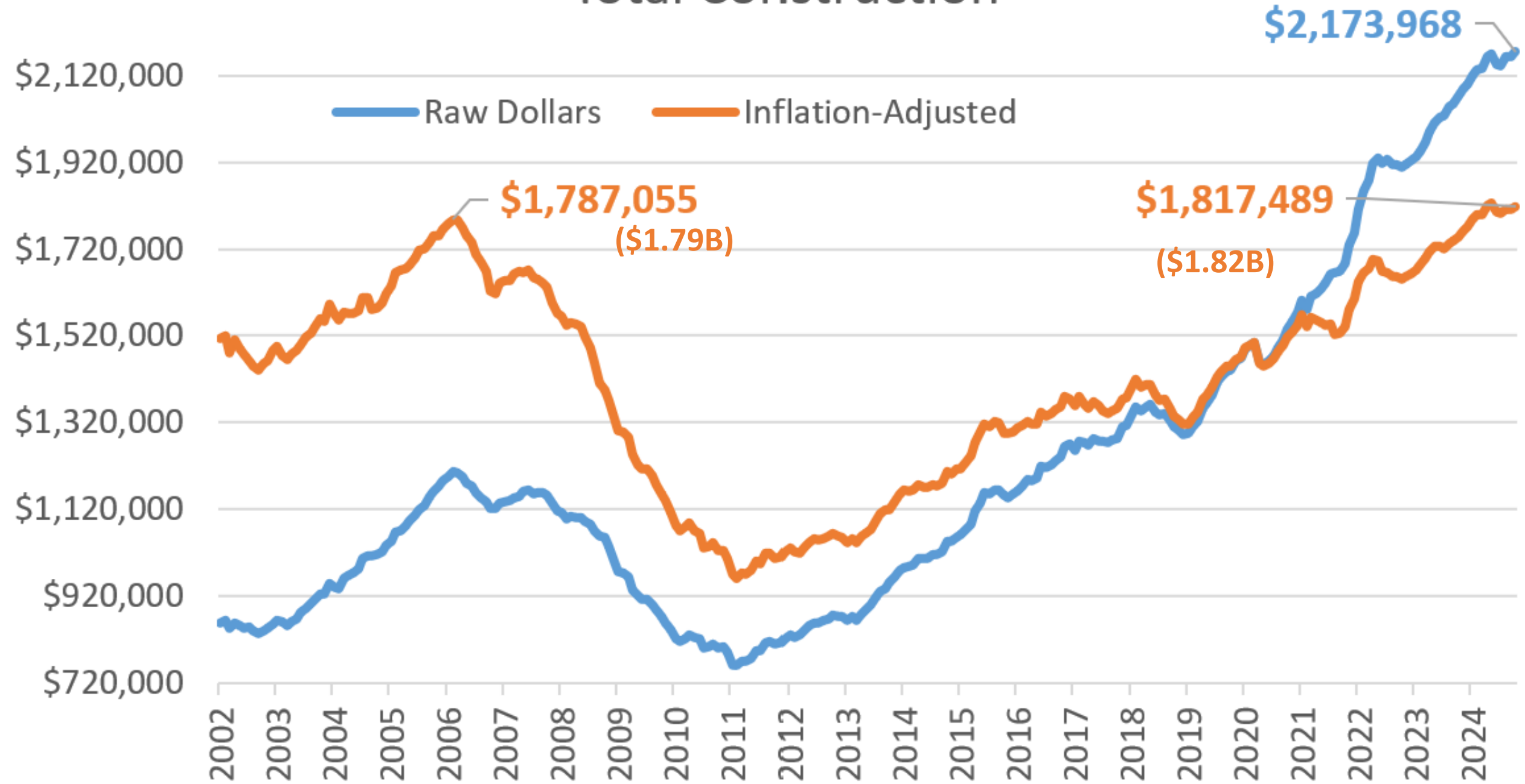
# Proposals Cost Money

# Suppliers Don't Have Unlimited Funds!

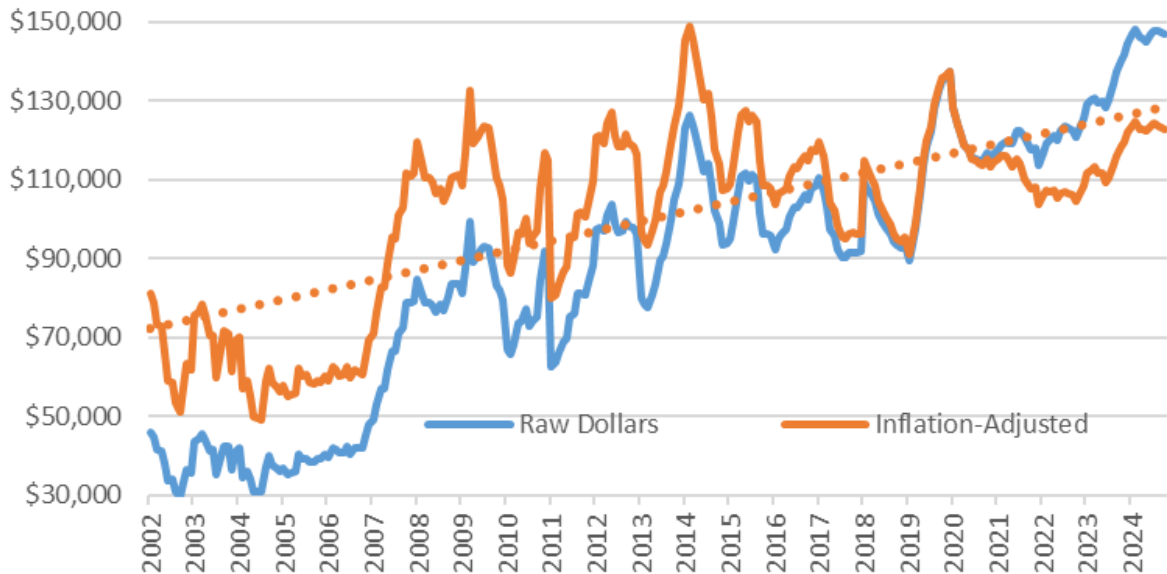


- Suppliers can't afford to propose on solicitations for fun.
- Responding to RFP's costs money and resources.
- Suppliers make a business decision on whether your solicitation is 'worth' the effort to propose.

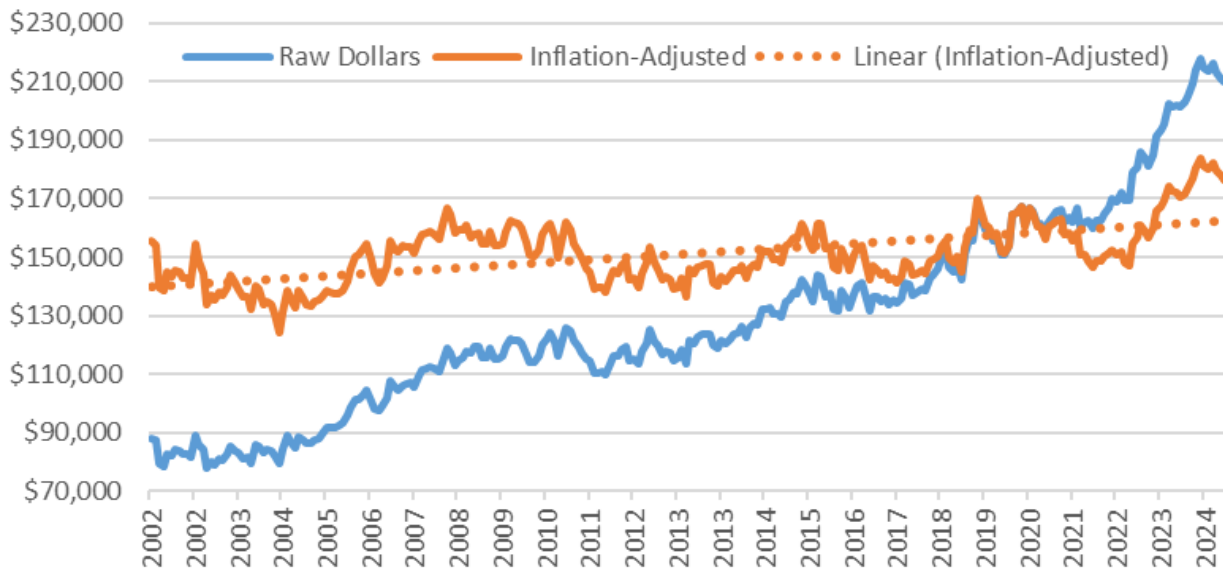
# Total Construction



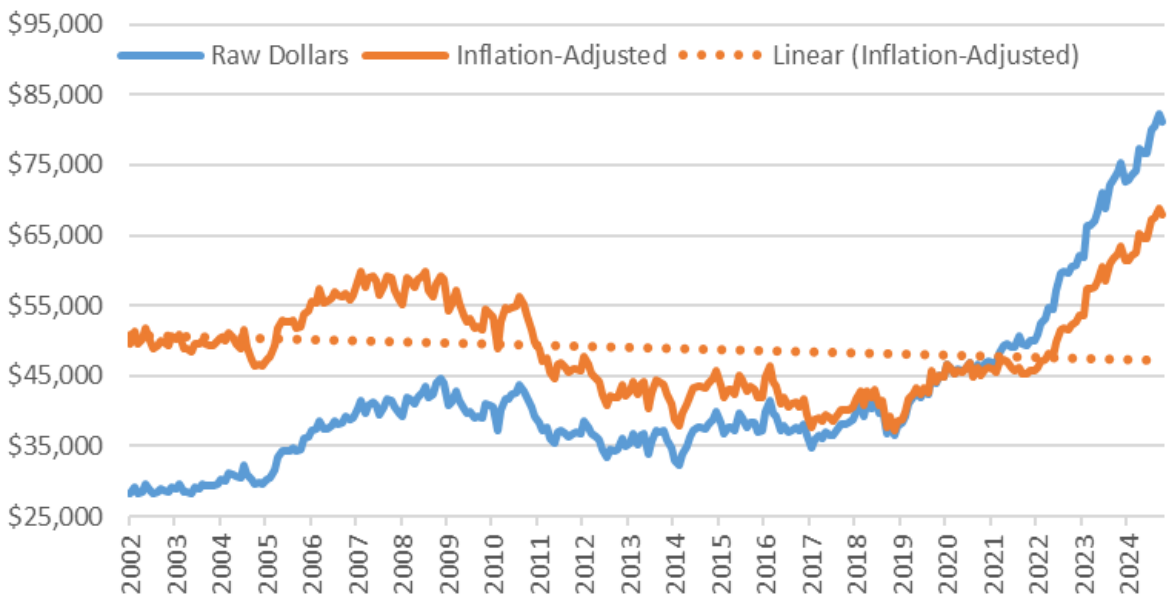
### Power



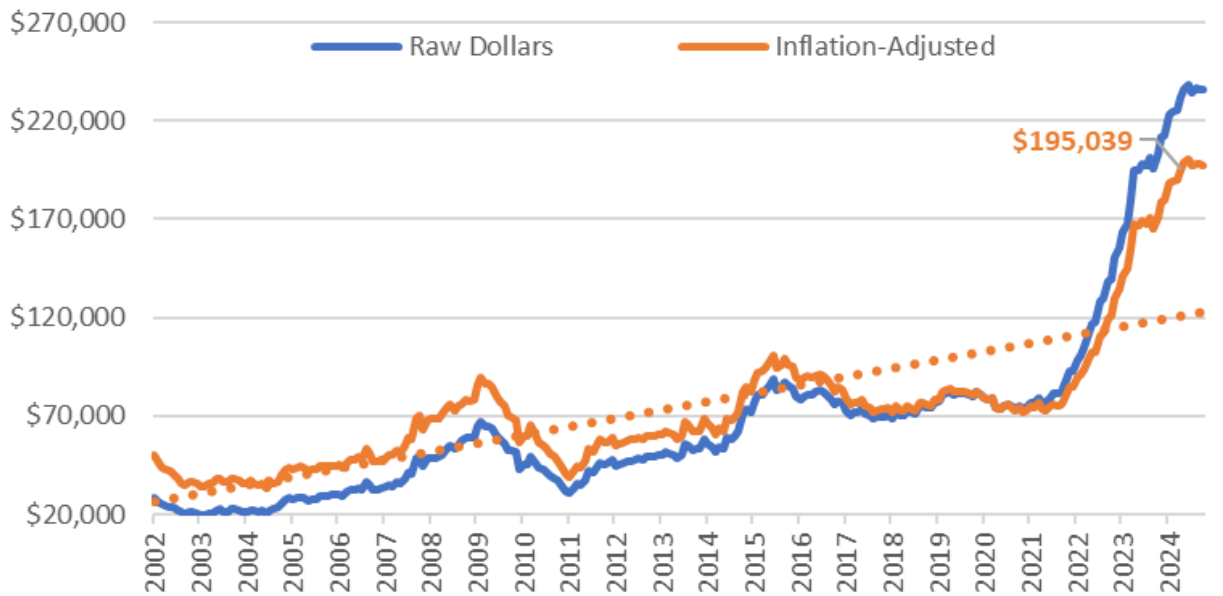
### Transportation (air, land, water, highway, road)



### Water & Wastewater



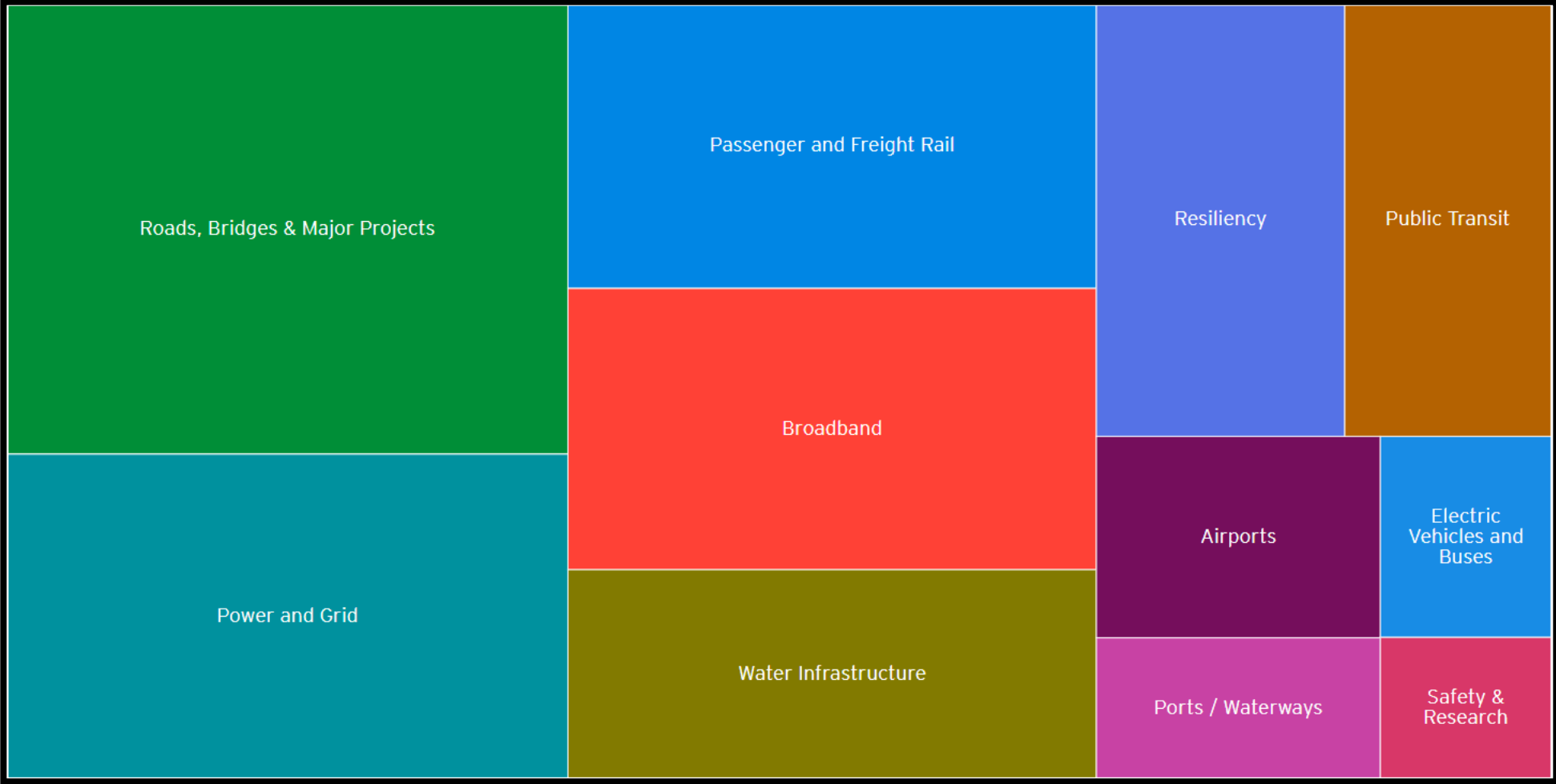
### Manufacturing





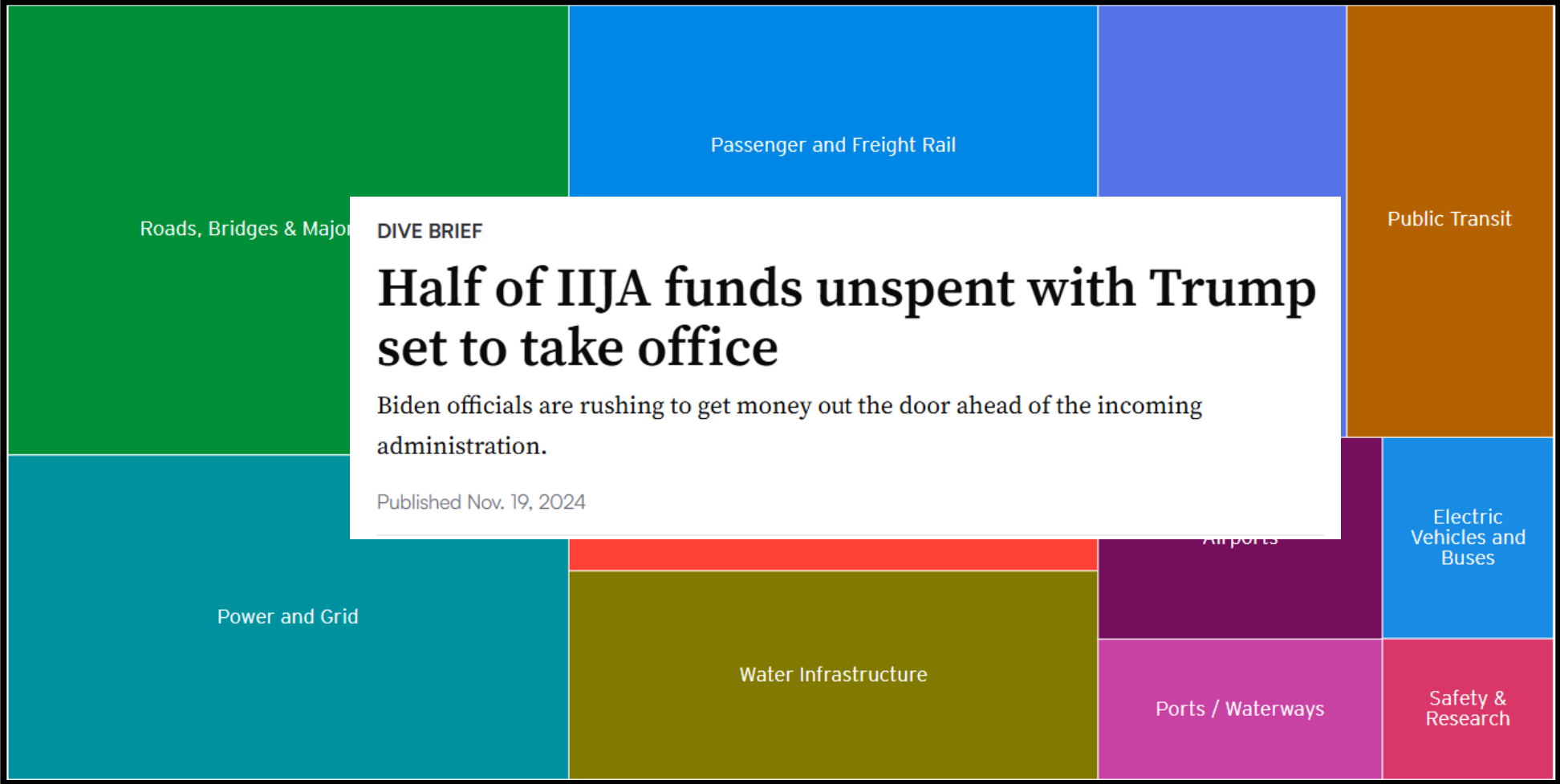
# IJA (“Infrastructure Bill”) - \$1.2T/5yr (Nov ’21)

- Roads and bridges: \$110B
- Power and grid: \$73B
- Rail: \$66B
- Broadband: \$65B
- Water infrastructure: \$55B
- Resiliency: \$46B
- Transit: \$39B
- Airports: \$25B
- Environmental: \$21B
- Ports/waterways: \$17B
- Safety/Research: \$11B
- Low-carbon buses and ferries: \$7.5B
- EV infrastructure: \$7.5B



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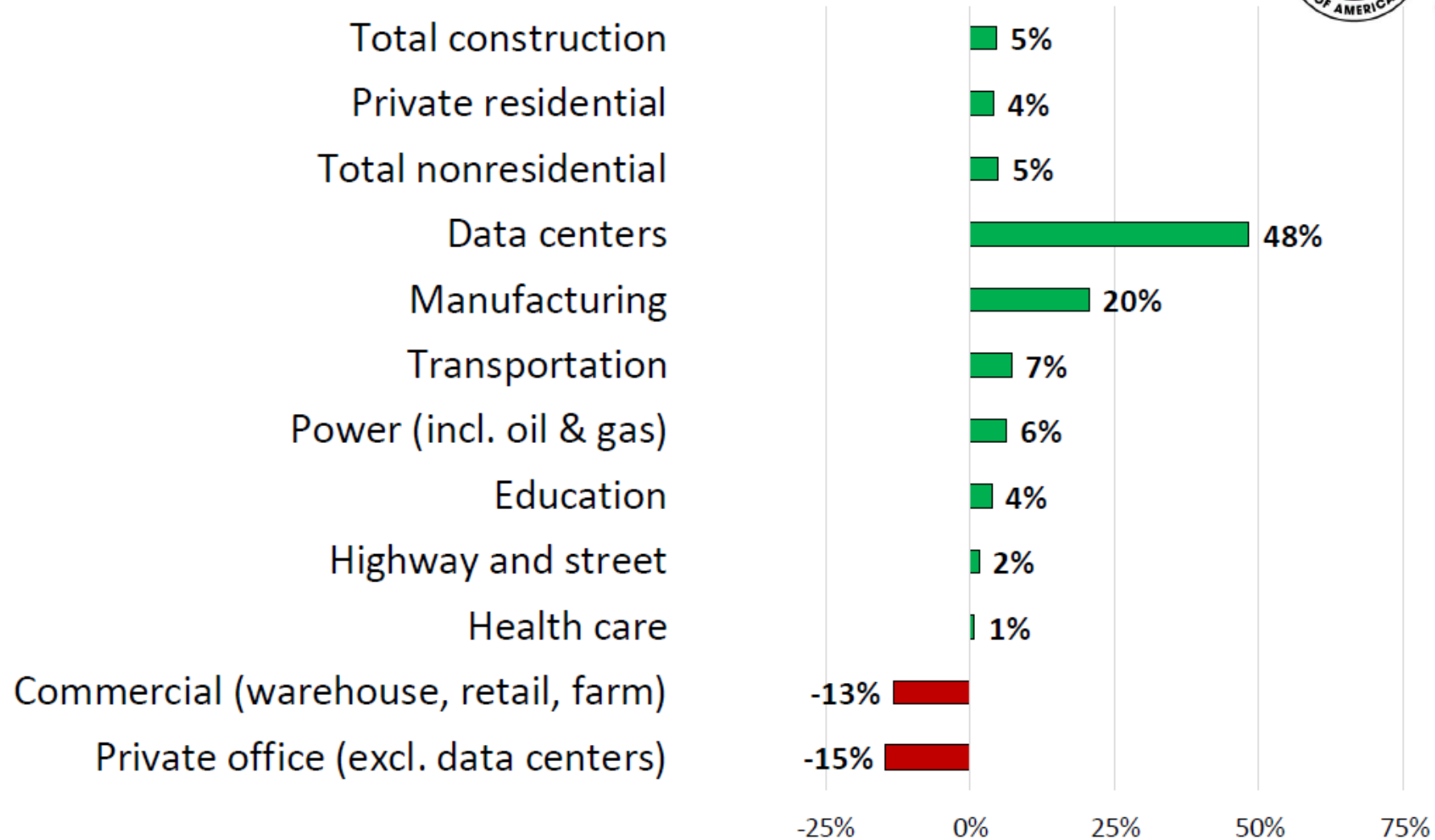


**DIVE BRIEF**  
**Half of IIJA funds unspent with Trump set to take office**  
 Biden officials are rushing to get money out the door ahead of the incoming administration.  
 Published Nov. 19, 2024



## Change in construction spending: September 2023-September 2024

Year-over-year % change in current (not inflation-adjusted) dollars, seasonally adjusted

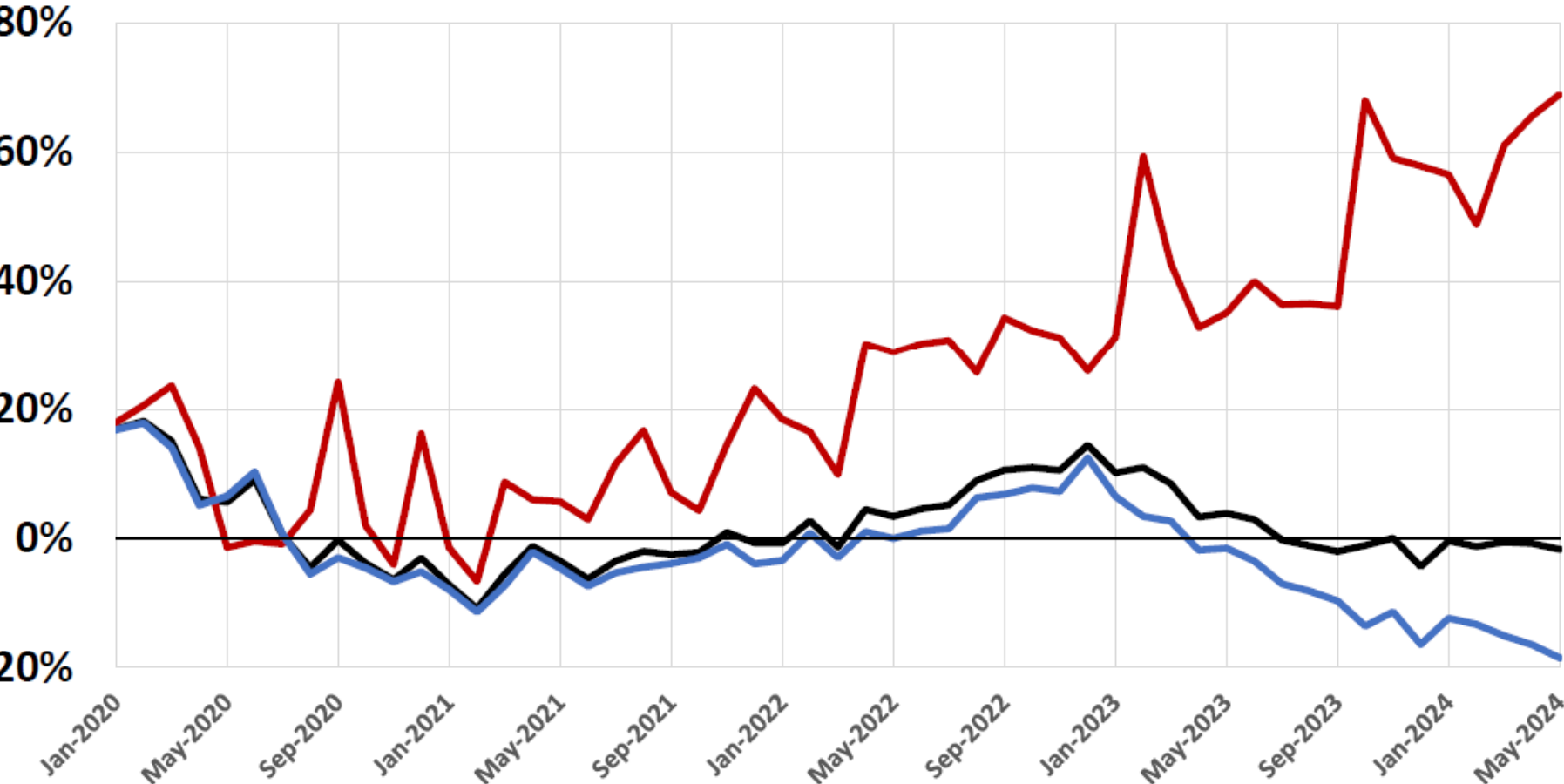


# Megaprojects

- 2023 = new annual record of 41 megaprojects (\$103.9B)
- 2022 = at the time, record of 31 megaprojects (\$103.2B)
- 2019 = prior best of 35 megaprojects (\$79.1B)

# Private office & data center construction spending, 2020-2024

Year-over-year change in private office, office excl. data centers, & data center construction spending, Jan. 2020 – May 2024, seasonally adjusted annual rate



	May 2024	% change since:	
	Spending (bil. \$):	May 2023	Jan. 2020
Data centers	\$27B	69%	181%

Private office	\$82B	-1.7%	-2%
Office excl. data centers	\$55B	-18%	-26%

# Contractors are eager to hire



% of firms with openings for:

hourly craft positions



salaried positions



# % of contractors with openings that report difficulty filling



## Hourly craft positions



## Salaried positions



0% 20% 40% 60% 80% 100%

# Organizing a High-Performing RFP



# Organizing a High-Performing RFP

## RFP

Request for Proposal



Construction Manager at Risk  
**CMAR Template**

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

1 Statement of Work

2 Current Conditions

3 Proposal Requirements

4 Evaluation Procedures

5 Administrative Requirements

6 Proposal Forms

7 Attachments & Exhibits

# Organizing a High-Performing RFP

## RFP

Request for Proposal



Construction Manager at Risk  
CMAR Template

RFP Number: #####

RFP Release Date: MM/DD/YYYY

RFP Due Date: MM/DD/YYYY

1 Statement of Work

What You Want to Achieve

2 Current Conditions

Where You Are At

3 Proposal Requirements

What Will Be Evaluated

4 Evaluation Procedures

How the Client will Score & Award

5 Administrative Requirements

General Instructions, Dates & Contact

6 Proposal Forms

Forms to Complete

7 Attachments & Exhibits

Supplemental Information

# \*FREE\* Online Course! 10 PDH

**Now: Jan 7, 14, 21, 28**

**2025 x 3 times  
(Jan, May, Aug)**



## Better RFPs = Better Projects

- Session #1 = Organizing a High-Performing RFP
- Session #2 = Effective Statements of Work (SOWs)
- Session #3 = Evaluation Best Practices & Vendor Debriefings
- Session #4 = RFP Administration

## NASPO's Procurement U

- Log on to the Procurement U Learning Management System (LMS) to register, access the course and materials.  
[www.naspo.org/procurement-u/](http://www.naspo.org/procurement-u/)  
– or Email Amy: [amy@center4procurement.org](mailto:amy@center4procurement.org)
- Open to all (even non-members of NASPO)

# Simple Things To Consider

# Attracting High-Performing Contractors

- 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". Below the title is a sub-header: "Learn about the portal to access bid opportunities with the state of California." A call-to-action box on the left says "CAL EPROCURE" and "California's Online Marketplace" with a button "GO TO CAL EPROCURE WEBSITE". The main text describes the portal as California's new online marketplace 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 states that Cal eProcure is user-friendly and responsively designed for mobile devices. A final paragraph explains 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. A prominent 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." The interface also includes sections for "Docs on Demand with DocView" with a "Try Free" button and "Learn more" link, and "DocSearch" with a "Request Demo" button and "Learn more" link. On the right side, there is a preview of a document viewer showing a search result for "03-0984996.pdf" and a list of "All Documents" with a "Download All" option. A play button icon is overlaid on the document preview, suggesting a video or interactive content.







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...**

# 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 Construction Services for City Facilities*

# Avoid Long or Vague Titles

- ~~*City of Nashville Request for Proposals for Suppliers that can perform Construction Services for Office Renovations*~~

# Attracting High-Performing Contractors

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

# 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 High-Performing Contractors

- 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:

(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 High-Performing Contractors

- 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...

# *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 Contractors  
Responding To  
Our RFP's??



# Attracting High-Performing Contractors

- 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 Contractors

# Most Important Items To Contractors?

- 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 Contractors?

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- ✘ Withdrawing Proposals
- ✘ Addenda
- ✘ Disclosure Information
- ✘ Tax Responsibilities
- ✘ Protest procedures



...So, What Are The Most Important  
Items To High-Performing Contractors?



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

- SOW
- Budget
- Schedule

## 1. Can I Provide What You Need?

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

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

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- SOW
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## 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

# Best Practices – Evaluation Criteria

Criteria	Weight
Cost	25%
Approach & Methodology (Proposal)	15%
Company Experience (Proposal)	5%
Key Personnel Experience (Proposal)	10%
References (Proposal)	5%
Presentation & Interview (Key Personnel)	40%

<https://center4procurement.org/rfp-doctor/#teaching>



**What is Cost Worth?**

February 16, 2023

**CPE** Center for Procurement Excellence

**ASK**  
the **RFP**  
**Doctor**

The image shows a video thumbnail on a dark background. On the left, the text 'What is Cost Worth?' is in white, with the date 'February 16, 2023' below it. The CPE logo is in the bottom left. A red play button icon is in the center. On the right, a clipboard graphic contains the text 'ASK the RFP Doctor' in blue and red, with a stethoscope around it.

# Major Takeaways

- Not a significant difference between delivery methods.
- Getting a good team (procurement process) and getting them involved early (timing) matters.
- The primary goal of the RFP is to help us award to a high-performing supplier.
- Proposals cost money so don't scare suppliers away!
- Keep your RFP simple and well organized. Everyone is busy!
- Understand what information is most critical to Contractors.
- Avoid put too much weight for cost.

# Alternative Construction Delivery Methods and High-Performing RFPs: A Guide for Procurement Professionals

Download Today's Slides & Resources



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



[Click here to  
join the interest list!](#)

# AI Procurement Boot Camp Spring 2025

- **Three interactive sessions:**
  1. Using AI to Write Better Statements of Work
  2. Unlocking the Power of AI in Data Analytics for Procurement
  3. Creating a Custom-AI Tool for your Organization
- **AI Tools for Procurement:** Master AI technologies to enhance procurement practices.
- **Boosted Productivity:** Streamline meeting and email management to improve efficiency.
- **Contract Analysis:** Quickly analyze and evaluate purchasing contracts.



# \*FREE\* Online Course! 10 PDH

Now: Jan 7, 14, 21, 28

2025 x 3 times  
(Jan, May, Aug)



## Better RFPs = Better Projects

- Session #1 = Organizing a High-Performing RFP
- Session #2 = Effective Statements of Work (SOWs)
- Session #3 = Evaluation Best Practices & Vendor Debriefings
- Session #4 = RFP Administration

## NASPO's Procurement U

- Log on to the Procurement U Learning Management System (LMS) to register, access the course and materials.  
[www.naspo.org/procurement-u/](http://www.naspo.org/procurement-u/)  
– or Email Amy: [amy@center4procurement.org](mailto:amy@center4procurement.org)
- Open to all (even non-members of NASPO)

# \*NEWer\* Courses by CPE + NASPO

- The 1, 2, 3's of a Great Scoring Matrix (2025x2 = Feb, Oct)
  - Session #1: Creating an Evaluation Matrix [90min]
  - Session #2: Complexities of Real-World Scenarios [90min]
- Deep Dive on Effective Evaluations (2025 x2 = Mar, Oct)
  - Session #1: Planning Your Evaluation Strategy [90min]
  - Session #2: Training Your Evaluators [90min]
  - Session #3: Strategies for the Negotiation Phase [90min]

Look for  
these courses on...



# Free Webinar Series!

3<sup>rd</sup> Thursdays monthly  
@ 12pm Central

## *15min Teaching Moment*

(learn a new tip, trick, or tool)

## *20min Virtual Peer Group*

(network with other procurement professionals)

## *5min Announcements & Opportunities*

(upcoming courses & other ways to get involved)

## *Office Hours*

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



[center4procurement.org/rfp-doctor](https://center4procurement.org/rfp-doctor)

# Invite your Friends!

[center4procurement.org/rfp-doctor](https://center4procurement.org/rfp-doctor)



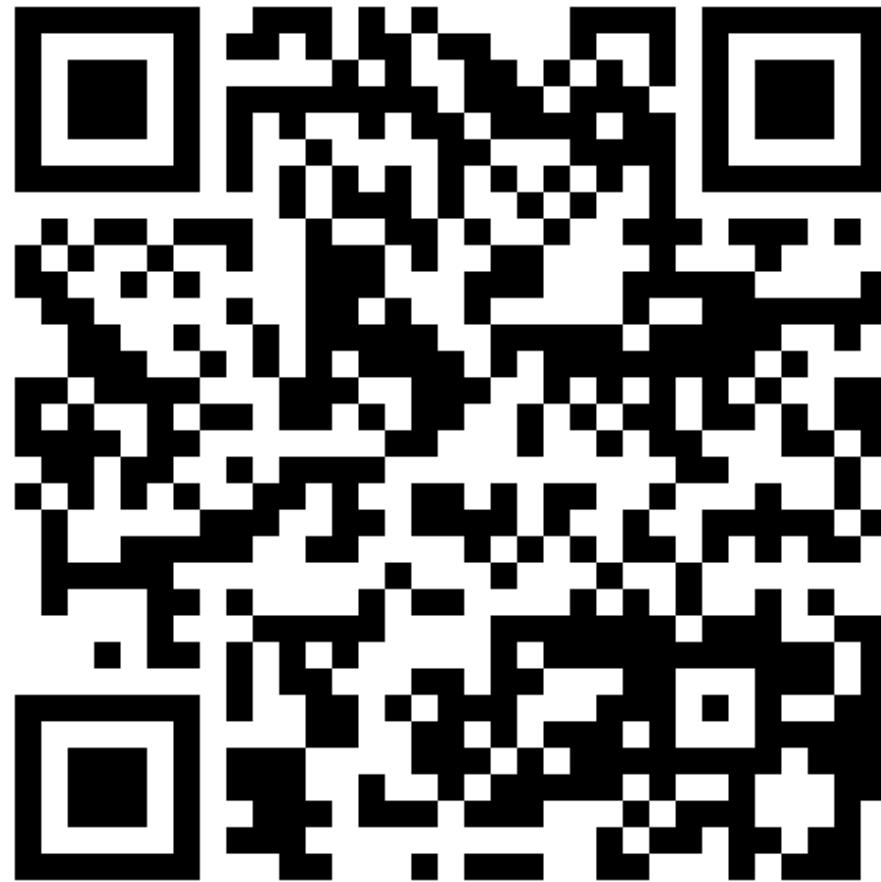
Home About CPE ▾ Events ▾ **Ask the RFP Doctor ▾** Certification ▾ Templates, Guides & Tools Membership ▾ Contact

## Register For Ask The RFP Doctor Event

We will send you your personal admission credentials via email.

**REGISTER NOW!**

# RFP Doctor Sign-up (FREE)



# 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)

# 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)!



# Human Dimensions Assessment

- **FREE** Personality, Emotional Intelligence, and Behavioral Diagnostics assessment.
- Individualized reports created for each respondent!
- Report provides a detailed insight into an individual's personality type and how it compares with organization & overall industry.
- Information about how the individual compares against the best-in-class in the industry is provided.

[rebecca.kassa@simplar.com](mailto:rebecca.kassa@simplar.com)





Thank You!

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