

Session 3 of 4: Proposal Submission Protocols and Evaluation Best Practices
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Proposal Submission Protocols & Evaluation Best Practices

RFP Training Course



Agenda

- Ten Tips to Improve Proposal Evaluations
- RFP Scheduling Tips & Challenges



Putting RFP Excellence Into Practice

- Fair
- Open
- Transparent
- Value
- Integrity

Strategic Objective:
Become a “Client of Choice”
and attract
High-Performing Vendors
across your RFPs



Why are these Foundations so Important?

- Obvious reason is to stay out of jail or the courtroom
- But this is what drives good vendors to your projects, and gets them to invest their time and effort.

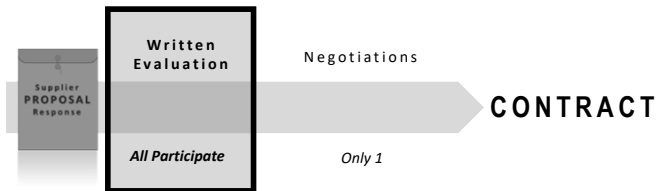


Session 3 of 4: Proposal Submission Protocols and Evaluation Best Practices

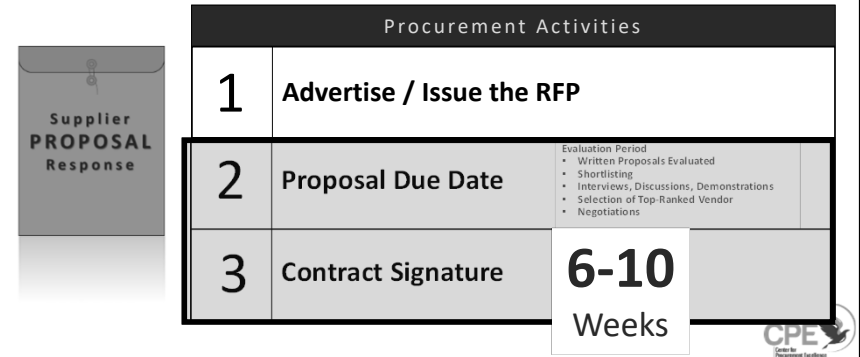
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Let's Define It: Evaluation Period

- This is an area of weakness for many Clients and can lose Fairness, Openness, Transparency, Value, and Integrity



Evaluation Period



10 Tips to Improve Proposal Evaluations



Ten Tips to Improve Proposal Evaluations ☒

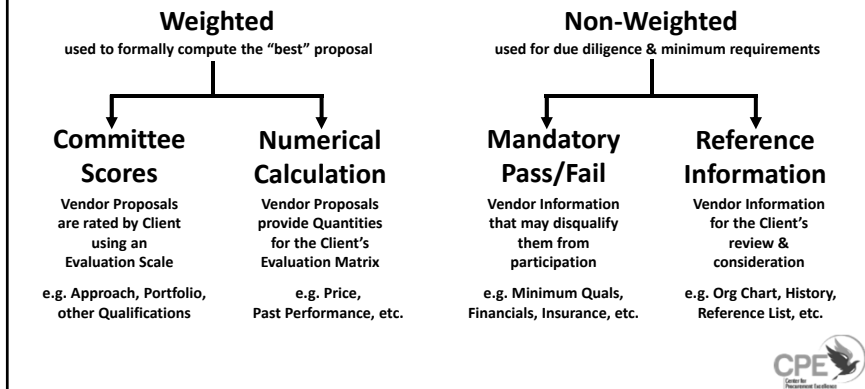
1. Understand the Different Types of Evaluation Criteria



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Understand the Different Types of Evaluation Criteria



Understand the Different Types of Evaluation Criteria: Committee Scores

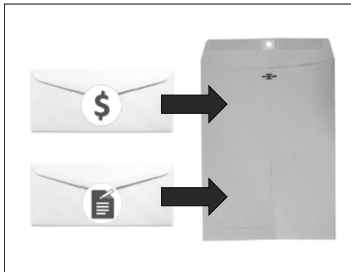
Written Proposal



- 1) Verify past experience
 - Team vs Individual experience
 - Past Projects
 - Resumes & References
- 2) Verify understanding of our needs
 - Approach & Methodology
 - Solution & Workplan
 - Schedule



Understand the Different Types of Evaluation Criteria: Numerical Calculation



- Cost/Price should be numeric!!!
- Cost is generally submitted in a separate sealed envelope
- Not revealed to the Evaluation Committee until evaluation is complete (to minimize bias)



Understand the Different Types of Evaluation Criteria: Mandatory Pass/Fail + Reference Information

- Keep these clear, concise, and understandable!!!
- Do not make these a lot of work for vendors to complete!!!



- What do you need to make an informed selection?
 - Will your org actually read & review this info from all proposals?
- Otherwise gather later but still before signing the contract!



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Ten Tips to Improve Proposal Evaluations

1. Understand the Different Types of Evaluation Criteria
2. Establish a Source Selection Plan (SSP) before RFP release



Establish the SSP Before the RFP is Released

- Describes how the evaluation and scoring of proposals will be conducted
- Serves as a guide/instructions for evaluators
- This document can also be referred to as:
 - Source Selection Guide (SSG)
 - Proposal Evaluation Guide (PEG)



Establish the SSP Before the RFP is Released

- Describes how the evaluation and scoring of proposals will be conducted
 - Roles & Responsibilities of Procurement / Buyer
 - Evaluation Procedures
 - Evaluation Instructions
 - Ethics and Conflicts of Interest
 - Critical Items



Establish the SSP Before the RFP is Released

- Do not try to figure out the evaluation process after RFP is released....TOO LATE
- Create the SSP prior to releasing the RFP.
 - This allows the evaluators and SME's time to provide input before releasing the RFP.
- Minimizes time spent trying to figure things out
 - (or do something not permitted based on the RFP language)



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The SSP should always
be documented to minimize the
Risk of Protest



Ten Tips to Improve Proposal Evaluations ☒

1. Understand the Different Types of Evaluation Criteria
2. Establish a Source Selection Plan (SSP) before RFP release
3. Recognize that Evaluators have Bias



Recognize that Evaluators have Bias

- Bias is not always so “foreword” or “shocking”
- Usually, bias comes from Evaluators who:
 - Think they “already know” the best vendor
 - Look at logo/brand more than resources/approach
 - Have pre-conceived notions about the “right” approach
 - Are not open to new ideas



Ten Tips to Improve Proposal Evaluations ☒

1. Understand the Different Types of Evaluation Criteria
2. Establish a Source Selection Plan (SSP) before RFP release
3. Recognize that Evaluators have Bias
4. Balance the Evaluation Committee



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Balance the Evaluation Committee

Most Common Questions:

1. How many people should be on the evaluation committee?
2. Who should we select?
3. When should we select them?
4. What are their expectations?



Balance the Evaluation Committee

First Big Question: How Many People???

• 3 to 7 is the “sweet spot”

3-7

- Less than 3 = more difficult to balance & defend the scores.
- Greater than 7 = more difficult to coordinate and keep on track.
- Very small or simple projects may have 3-5 evaluators
- Complex projects, you should aim for 5-7 evaluators



Balance the Evaluation Committee

Important to Remember:

- More evaluators you have = the more you can mitigate someone with significant bias.



Balance the Evaluation Committee

- Watch out for bias from Technically-oriented evaluators.
 - They will rarely have as much experience as the vendor (the purpose of an RFP is to hire a vendor with more knowledge and skill than you!)

Technical Evaluator



1-2
Lifetime

Expert Vendor



100+
Last 5-Years



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Balance the Evaluation Committee

- Non-technical evaluators are needed too (and can work!)
 - Need them to fill out the Evaluation Committee
 - (usually not enough technical evaluators to make an entire Evaluation Committee)
 - Every organization has Non-Technical Evaluators
 - Are able to score based on basic “logic” and “reason”



Balance the Evaluation Committee

- Be cautious of including Executives or Senior Personnel
 - Can “sway” the rest of the committee
 - Typically very busy = can put timeline in jeopardy



Ten Tips to Improve Proposal Evaluations ☒

1. Understand the Different Types of Evaluation Criteria
2. Establish a Source Selection Plan (SSP) before RFP release
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4. Balance the Evaluation Committee
5. Avoid Consensus Meetings!



Avoid Consensus Meetings!

- Avoid at all costs!!!



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Avoid Consensus Meetings!

- Example #1: Tax-Accounting system for a State
- 3 vendors proposed. 5 evaluators.
- During consensus meeting, the internal IT “expert” stated:
 - “Vendor 1’s proposal may sound great....but they actually don’t have a major component of what the State needs (data warehousing)”.
 - This individual had done “a lot” of background research (outside of the proposals) and determined that this vendor is not capable of doing the work.
- So the evaluators all adjusted their scores based on what their internal expert said (scores dropped by 25-35%) – yikes!



Avoid Consensus Meetings!

- Example #1: Tax-Accounting system for a State
- However, since only 3 vendors, all were shortlisted to Interviews.
- During interviews, Vendor 1 was asked about their inability to perform ‘data warehousing’.
 - The vendor laughed at the question!
 - Said that they have one of the largest data warehousing systems in North America. They went on to list major institutions that were using their systems.
- After the interviews were over...the IT expert apologized to everyone and said that they were not aware.



Avoid Consensus Meetings!

- Example #2: Personal Push for a Score
- 7 evaluators. Scores were shown. One evaluator argued for 2hrs.
 - Eventually 4 evaluators said:
“OK, fine, I give up, just change our score to whatever you want, I don’t care any more, I just want to get out of this meeting!”
- Procurement intervened:
 - “Please provide justification for these changes so we can defend your actions in court.”



Avoid Consensus Meetings!

- It’s amazing what actually happens behind the scenes!!!!
- These examples are not unique...they happen frequently.
- Which is why we NEVER recommend consensus meetings.
- They result in a lot of time being wasted, but more importantly, it encourages evaluator influence which goes against core procurement principles!
- If you want to streamline your evaluation process, and improve the fairness, just use the average evaluator scores. This is simple, takes less time, and is much easier to justify.



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Individual Evaluations

- Evaluations must be performed **individually** (not group consensus)
- Evaluators must **not** discuss with anyone (only contact Buyer for clarification)
- Evaluations should be **non-biased** (use logic and/or verifiable performance documentation to assist in determining the rating.)
- Evaluators must be **honest and fair** as possible with the rating (with the understanding that these ratings are not being used to award an actual project, but to pre-qualify vendors into an overall program).
- The Buyer reserves the right to clarify any ratings, request additional evaluator comments, or modify/reject a rating.



Ten Tips to Improve Proposal Evaluations



1. Understand the Different Types of Evaluation Criteria
2. Establish a Source Selection Plan (SSP) **before** RFP release
3. Recognize that Evaluators have Bias
4. Balance the Evaluation Committee
5. Avoid Consensus Meetings!
6. Use Standardized Proposal Forms



Use Standardized Proposal Forms

- Major problem with RFP's....when they don't think ahead and plan for when proposals come in.
- You can get a wide range of proposals that are very difficult to navigate.



Use Standardized Proposal Forms

Simple Solution: All Criteria Must Be Transformed into a Proposal Form Template!

The image displays three sample proposal form templates.
1. **SUBMITTAL FORM A: Project Information** includes fields for Project Name, Project Description, Project Location, and Project Dates.
2. **SUBMITTAL FORM I: Past Performance Questionnaire** includes a table for listing past projects with columns for Project Name, Project Location, Project Dates, and a section for Project Description.
3. **SUBMITTAL FORM E: Vendor Information** includes fields for Vendor Name, Vendor Address, Vendor Phone, and Vendor Email.
Each form has a 'SUBMITTAL FORM' header and a 'CPE' logo at the bottom right.



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Use Standardized Proposal Forms

Example #1:

The Proposer is required to comply with the State's accessibility policies, practices and procedures established in accordance with the American Disabilities Act (ADA). The Proposer must identify if your company have an accessibility policy? If so, Proposers may include a copy of the policy. Identify if your company provide accessibility training and resources to all employees? If so, please describe. Identify if your company provide accessible customer service? If so, please describe. Describe the accessibility features of the service your company is offering. What is your company's process for regular review and updates on accessibility within your industry? Does your service comply with all relevant portions of the ADA? Please describe. Proposers should also include their most recent ADA compliance report. If your company's service does not currently meet ADA or similar accessibility standards, is there an action plan to reach compliance? Please describe and include timelines.



Use Standardized Proposal Forms

• Create a Proposal Form!

PROPOSAL FORM H – ACCESSIBILITY (ADA)

1) Does your company have an accessibility policy? ☐ Yes ☐ No
If so, Officers may include a copy with your submission

2) Does your company provide accessibility training and resources to all employees? ☐ Yes ☐ No
If so, please describe: _____

3) Does your company provide accessible customer service? ☐ Yes ☐ No
If so, please describe: _____

4) Describe the accessibility features of the service your company is offering: _____

5) What is your company's process for regular review and updates on accessibility within your industry? _____

6) Does your service comply with all relevant portions of the ADA? ☐ Yes ☐ No
If so, please describe: _____

Officers should also include their most recent ADA compliance report or similar if outside of the State with submission in Office under Supporting Documentation

7) If your company's service does not currently meet ADA or similar accessibility standards, is there an action plan to reach compliance? ☐ Yes ☐ No
If so, please describe and include timelines: _____



Use Standardized Proposal Forms

SCENARIO 1

The Proposer is required to comply with the State's accessibility policies, practices and procedures established in accordance with the American Disabilities Act (ADA). The Proposer must identify if your company have an accessibility policy? If so, Proposers may include a copy of the policy. Identify if your company provide accessibility training and resources to all employees? If so, please describe. Identify if your company provide accessible customer service? If so, please describe. Describe the accessibility features of the service your company is offering. What is your company's process for regular review and updates on accessibility within your industry? Does your service comply with all relevant portions of the ADA? Please describe. Proposers should also include their most recent ADA compliance report. If your company's service does not currently meet ADA or similar accessibility standards, is there an action plan to reach compliance? Please describe and include timelines.

SCENARIO 2

PROPOSAL FORM H – ACCESSIBILITY (ADA)

1) Does your company have an accessibility policy? ☐ Yes ☐ No
If so, Officers may include a copy with your submission

2) Does your company provide accessibility training and resources to all employees? ☐ Yes ☐ No
If so, please describe: _____

3) Does your company provide accessible customer service? ☐ Yes ☐ No
If so, please describe: _____

4) Describe the accessibility features of the service your company is offering: _____

5) What is your company's process for regular review and updates on accessibility within your industry? _____

6) Does your service comply with all relevant portions of the ADA? ☐ Yes ☐ No
If so, please describe: _____

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7) If your company's service does not currently meet ADA or similar accessibility standards, is there an action plan to reach compliance? ☐ Yes ☐ No
If so, please describe and include timelines: _____



Use Standardized Proposal Forms

14. Explain at what point the assessment contract/service level agreement begins and the software warranty or installation acceptance period ends.

15. Do proposed acquisition and/or ongoing maintenance/support costs include:

- Future release updates to a point-to-point application modules?
- Operating system and related environmental software?
- Interface maintenance?
- Architecture changes such as migration to emerging technologies and new methods of system deployment?

16. List, describe the conditions and times under which release/maintenance releases are made available to existing customers.

17. What are your current support hours (specify time zone)? Where is support staff located?

18. Which of the following support features are available?

- Toll free hotline
- Remote monitoring
- Remote diagnostics
- Training materials
- Web-based support tracking

19. Do you offer 24/7 software and hardware support?

20. What is the response time for problems reported:

- During regular business hours (and what are your regular business hours)
- During off hours

21. Describe your problem reporting software and tools. Are they available online? Can a list of outstanding problems and enhancements be downloaded?

22. List the top five support questions you receive from your clients.

23. Describe your support process for evaluating and fixing bugs or problems. How would you coordinate problem analysis and resolution with other third party providers?

24. Provide a guideline for the type of annual support that will be required. For the number of administrative systems personnel, by classification, and also new information systems personnel (i.e., department heads). Describe their roles and responsibilities.

25. What is the range and average for system downtime (scheduled and unscheduled) for your clients' systems?



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Use Standardized Proposal Forms

34. Explain at what point the maintenance contract/service level agreement begins and the software warranty or installation acceptance period ends.

35. Do proposed acquisition and/or required maintenance support costs include:

- Future enhancements to acquired licensed applications software?
- Operating system and related environmental software?
- Architectural changes such as migration to emerging technologies and new methods of systems deployment?
- If not, describe the conditions and terms under which enhancements/new releases are made available to existing customers.

36. What are your normal support hours (specify time zone)? Where is support staff located?

37. Which of the following support features are available?

- Toll-free hotline
- Remote monitoring
- Remote diagnostics
- Training materials
- Web-based support tracking

38. Do you offer 24/7 software and hardware support?

39. What is the response time for problems reported?

- During regular business hours (and what are your regular business hours)?
- During off hours

40. Describe your problem reporting software and tools. Are they available via the Internet? Can a list of outstanding problems and enhancements by clients be viewed online and downloaded?

41. List the top five support questions you receive from your clients.

42. Describe your support process for evaluating and fixing bugs or problems in your software. How would you coordinate problem analysis and resolution with other third party products?

43. Provide a guideline for the type of internal support that will be required, for the number of information systems personnel, by classification, and also non-information systems personnel (i.e., department-based). Describe their roles and responsibilities.

44. What is the range and average for system downtime (scheduled and unscheduled) for your clients' systems?

COMPANY EXPERIENCE - Water Treatment Facilities
Provide information on regarding your company's experience designing and constructing water treatment facilities over the past ten years. Only projects that are 100% complete and operational can be counted (on-going or in-progress projects cannot be counted in this analysis).

Number of Water Treatment Facilities constructed (N)	2008-2010
Number of Design-Build Water Treatment Facilities constructed (N)	
If you are a joint-venture between a construction firm and a design firm, identify the number of Design-Build Water Treatment Facilities constructed together as a team (N)	

PERSONNEL EXPERIENCE
Provide information on regarding the experience of the Key Personnel that have been assigned to this contract as identified in Subpart 1.01. Only projects that are 100% complete and operational can be counted (on-going or in-progress projects cannot be counted in this analysis).

Overall Project Lead	Design Lead	Procurement Lead	Project Manager	Site Representative	Hydraulics Lead	Engineering Operator
Number of Water Treatment Facilities the individual has participated in (N)						
Number of Water Treatment Facilities the individual has managed in a similar role that they will be on this project (N)						
Number of Design-Build Water Treatment Facilities the individual has participated in (N)						
Number of Design-Build Water Treatment Facilities the individual has managed in a similar role that they will be on this project (N)						
Number of years the individual has been employed with your company (Years)						



Ten Tips to Improve Proposal Evaluations



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4. Balance the Evaluation Committee
5. Avoid Consensus Meetings!
6. Use Standardized Proposal Forms
7. Reduce the Length of Evaluated Documents



Reduce the Length of Evaluated Documents

- 50 pages vs 5 pages....which is better?
- Which one will you actually read and evaluate?
- Which one will contractors actually spend more time preparing?



Reduce the Length of Evaluated Documents



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Ask for the Right Info at the Right Time

- Asking for a Safety Plan on a \$500 Million project...
... is this a good idea???

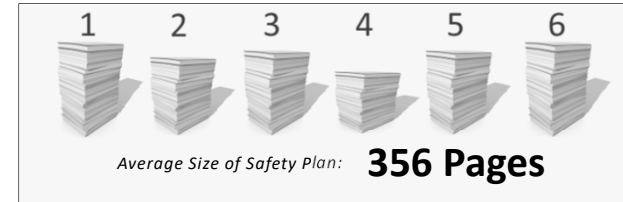


Case Study

(2017 High Tech Facility - \$ Billion)

Contents included:

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



Time Spent Evaluating:

2.5 Weeks

Deviation in Safety Plan Score:

1.52%



Ask for the Right Info at the Right Time

- Look at the big picture
 - Not saying the Safety isn't important...but these are oftentimes 'canned' & 'copy-and-paste' documents.
 - All qualified vendors will have them.
 - They don't help you differentiate.
 - They are a waste of time to try and read as evaluators
- Not saying to ignore this info...but get it during the negotiation period prior to contract signature!
 - There is approximately "ZERO" value during evaluation.
- Another example: org charts...very rarely do evaluators give different scores for these documents.



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7. Reduce the Length of Evaluated Documents
8. Use Effective Rating Scales



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Use Effective Rating Scales

Key Points:

- Focus on differentiation
- Be consistent on comparative vs. absolute scales
- Gather defensible justification from evaluators
- Use simple templates & forms!
- Be proficient in using an Evaluation Matrix



Use Effective Rating Scales: Focus on Differentiation

- There are many possible Evaluation Scales...
 - Numerical: 1 to 10, 1 to 5, 1-5-10, etc.
 - Coded: Red/Yellow/Green
 - And many many many more...!
- REMEMBER THE GOAL OF ANY SCALE:
 - To clearly differentiate between the proposals!
 - Need to train evaluators to think in terms of differentiation!
 - e.g. in a 1 to 10 scale, what's the difference between...
... a 5.7 and a 5.9 and a 6.1?



Use Effective Rating Scales: Be consistent on comparative vs. absolute scales

Have consistent basis of evaluation! Don't mix-and-match!

- **Comparative** | relative among competing proposals
 - e.g. compared to Average (such as Above vs. On vs. Below)
- **Absolute** | relative to an external benchmark
 - e.g. compared to Requirements or Expectations (such as Exceeds vs. Meets vs. Does Not Meet)



Use Effective Rating Scales: Gather defensible justification from evaluators

- Evaluators should...
 - Avoid arbitrary scores
 - Provide adequate explanation
 - Avoid generic feedback
 - Point to specific strengths/weaknesses of the proposal



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Use Effective Rating Scales: Use simple templates & forms!

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

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

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

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

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

Evaluation Form INTERVIEWS

VENDOR NAME
Identify the vendor that you are evaluating in this evaluation form.

☐ Vendor A ☐ Vendor B ☐ Vendor C
☐ Vendor D ☐ Vendor E ☐ Vendor F
☐ Vendor G ☐ Vendor H ☐ Vendor I

SCORING
Please evaluate the interview based on a 1-10 rating scale.
(1=Strongly Dislike, 5=Neutral, 10=Strongly Dislike)

CRITERIA	WEIGHT
Implementation Approach and Schedule	
Team, Capacity, Skill, or Challenges	
Scope and Deliverables	
Other Issues	

COMMENTS
Identify any strengths or weaknesses that may have contributed to any significant scoring.
Include final comments and recommendations.

☐ Excellent
☐ Good
☐ Fair
☐ Poor

Evaluator Name: _____ Date: _____

Use Effective Rating Scales: Be proficient in using an Evaluation Matrix

- Used to compile evaluator scores and “sum up” across all evaluation criteria.

		Total:		72.3	64.7	52.3
		100				
#	CRITERIA	Weight	Evaluation Scale	FIRM A	FIRM B	FIRM C
1	Cost	30	\$	\$110	\$100	\$125
2	Work Plan	10	1 - 10	8.7	7.0	5.0
3	Past Performance	10	1 - 10	9.0	8.0	6.7
4	Interview	15	1 - 10	9.5	7.0	5.0
5	Demonstration	10	1 - 10	9.7	6.5	7.0

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- Use Standardized Proposal Forms
- Reduce the Length of Evaluated Documents
- Use Effective Evaluation Scales
- Conduct Effective Interviews

Conduct Effective Interviews

Interview Checklist:

- Identify an exact time for each interview
- Email the shortlisted vendors (topics and time slot)
- Reserve a room with adequate space (vendor + eval)
- Ensure proper equipment (computer, screen, wifi)
- Copies of rating sheets for evaluators



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Traditional Presentation Process?



Key Personnel Interviews

XPD

- Conduct an actual 'interview' (not presentation)
- No notes, handouts, presentation material
- Interview 2-3 key personnel (primary, secondary, other SME if critical)
 - IT Software: Project Manager, Integration Lead, Technical Lead
 - Construction: Project Manager & Site Superintendent
 - Design: Lead Architect & Lead Engineer
 - Etc.



Whiteboard Exercise

XPD

- Lay out the project/service from start to end
- Identify areas of greatest risk/concern
- Anything that you need from us
- Opportunities for innovation



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6. Use Standardized Proposal Forms
7. Reduce the Length of Evaluated Documents
8. Use Effective Rating Scales
9. Conduct Effective Interviews
10. Be sure to track Return on Investment!



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Be sure to track Return on Investment!

- So... does this save money (time)?



Seattle City Light



- Public utility providing electrical power to the Seattle metro area.
- 10th largest public utility in the U.S.
- First in the US to own and operate a hydroelectric facility.
- In 2005, it became the first electric utility in the US to fully offset all its carbon emissions and has remained carbon neutral every year since.



Results of Streamlined Evaluations



- Time Savings on City Light's Major RFPs/RFQs
 - 50% reduction in Evaluation time (per proposal)
 - 75% reduction in Interview time (per vendor)
 - 50% reduction in total procurement duration
- –\$20K saved in evaluator time per RFP/RFQ



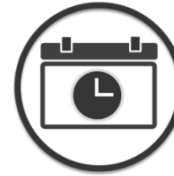
Q&A

What are some of the challenges you've experienced when conducting evaluations?

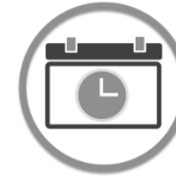


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RFP Scheduling Tips & Challenges



Project / Service



Procurement



Internal



Project / Service Schedule



- Identifies the critical dates that are related to the project itself.



Procurement Schedule



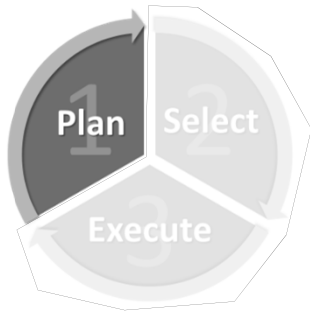
- Communicate to the Vendors the critical procurement timelines
- Activities & topics related to the procurement process



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1) Planning Phase

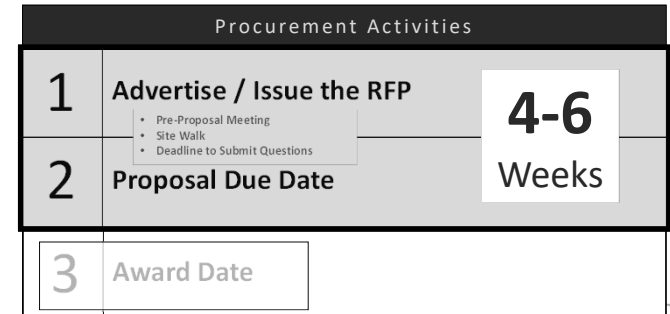
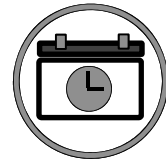


Plan & prepare for the start of the formal RFP Process

- Needs Assessment
- Business Case
- Funding & Budgets
- Approvals
- Contract Strategy
- Market Analysis



Advertisement Period



Issuing Your RFP

- Also called 'posting' or 'advertising'
- Informs your Vendor community about your project/service need
- Vendors can then review your solicitation and begin their formal response

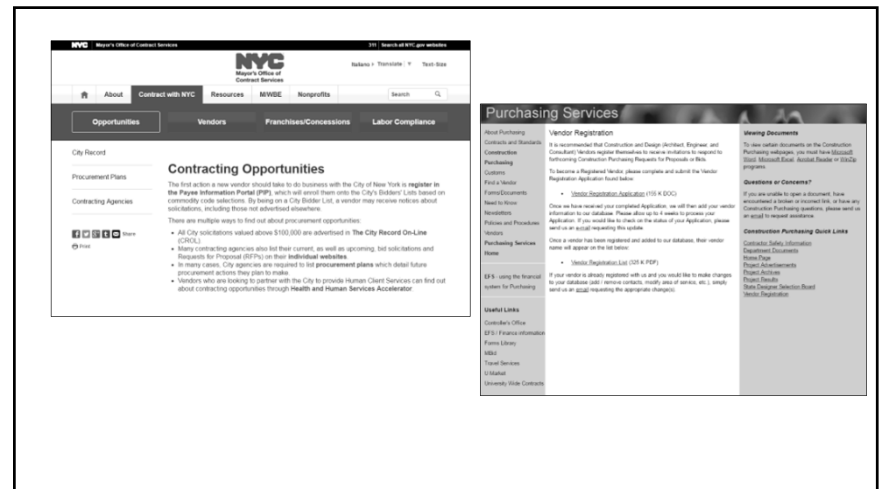
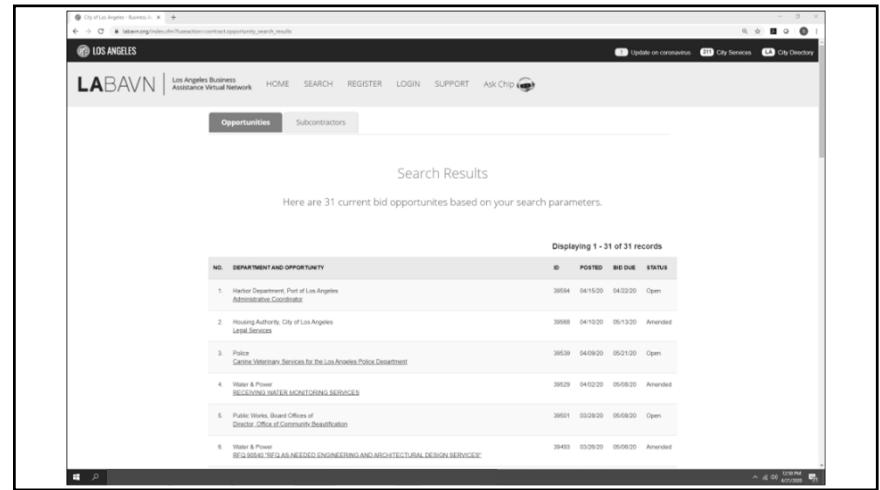


How Do Owners Advertise



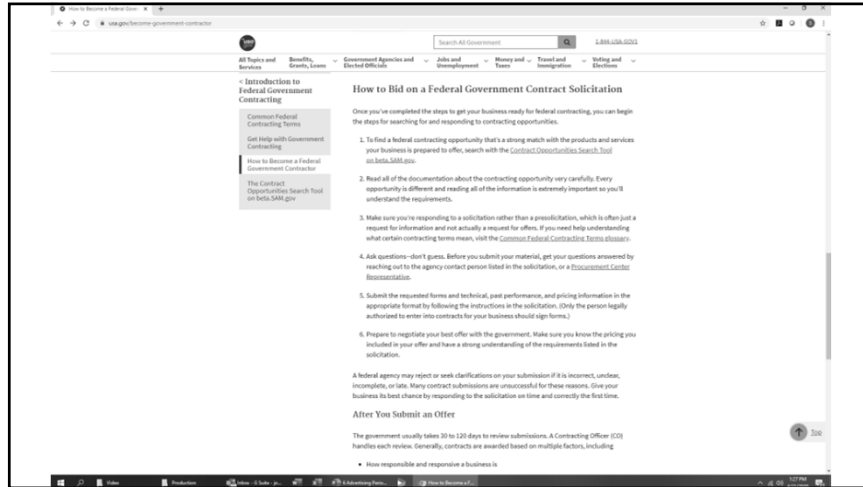
Session 3 of 4: Proposal Submission Protocols and Evaluation Best Practices

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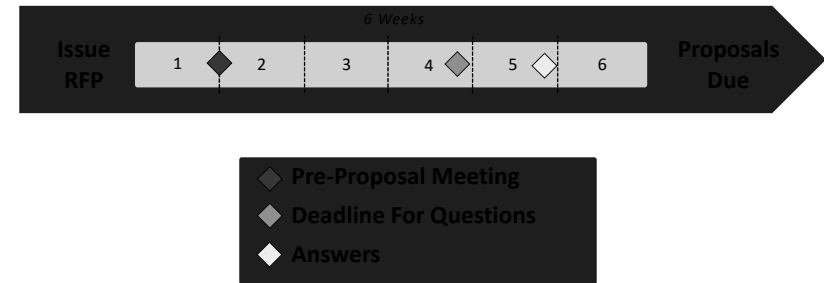


Session 3 of 4: Proposal Submission Protocols and Evaluation Best Practices

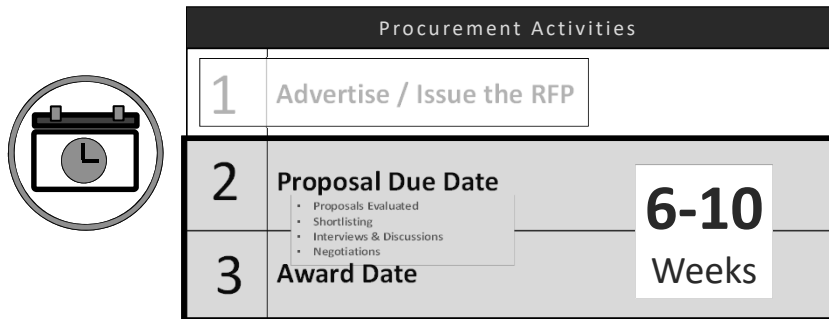
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Schedule – Advertisement Period



Evaluation Period



Advertisement Period



ACTIVITY	DURATION	START	END	JAN	FEB	MAR
ADVERTISEMENT PERIOD	6 Weeks	1-Jan	12-Feb			
Pre-Proposal Meeting	1 Day	10-Jan	10-Jan			
Site-Walk	1 Day	10-Jan	10-Jan			
Questions Due	4 Weeks	1-Jan	29-Jan			
Answers Posted	1 Week	29-Jan	5-Feb			
Proposal Due Date	1 Day	12-Feb	12-Feb			



Session 3 of 4: Proposal Submission Protocols and Evaluation Best Practices

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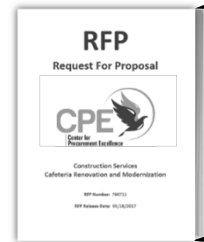
Evaluation Period



ACTIVITY	DURATION	START	END	JAN	FEB	MAR	APR
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Pre-Proposal Meeting	1 Day	10-Jan	10-Jan				
Site-Walk	1 Day	10-Jan	10-Jan				
Questions Due	4 Weeks	1-Jan	29-Jan				
Answers Posted	1 Week	29-Jan	5-Feb				
Proposal Due Date	1 Day	12-Feb	12-Feb				
EVALUATION PERIOD	9 Weeks	12-Feb	14-Apr				
Proposals Evaluated	3 Weeks	13-Feb	5-Mar				
Initial Shortlist	3 Days	5-Mar	10-Mar				
Notification of Shortlist	1 Week	10-Mar	17-Mar				
Interviews	1 Week	17-Mar	24-Mar				
Identification of Best Offeror	1 Week	24-Mar	31-Mar				
Contract Negotiations	2 Weeks	31-Mar	14-Apr				
AWARD DATE	1 Day	15-Apr	15-Apr				



Include the Schedule in the RFP



ANTICIPATED PROCUREMENT SCHEDULE
The Owner will make every effort to adhere to the schedule below. However, the Owner reserves the right, at its sole discretion, to adjust the schedule of events as it deems necessary.

ACTIVITY	TIME	DATE
RFP Released / Issued		11/17/17
Pre-Proposal Meeting	1:00 pm PST	12/4/17
Site Visit	4:00 pm PST	12/4/17
Deadline to submit questions	2:00 pm PST	12/13/17
Response to questions		12/20/17
Proposal Due Date/Time (Deadline)	2:00 pm PST	1/3/18
Shortlisting		1/24/18
Interviews & Presentations		1/30 - 1/31
Negotiation Period		2/14 - 3/13
Award		3/14/18

Internal Schedule



- Account for all internal processes and procedures
- Gain commitment from the client and SME's.
- Not shared with your suppliers
- Identify internal processes:
 - Evaluation due date
 - Reasonable and realistic
 - Internal approvals prior to award



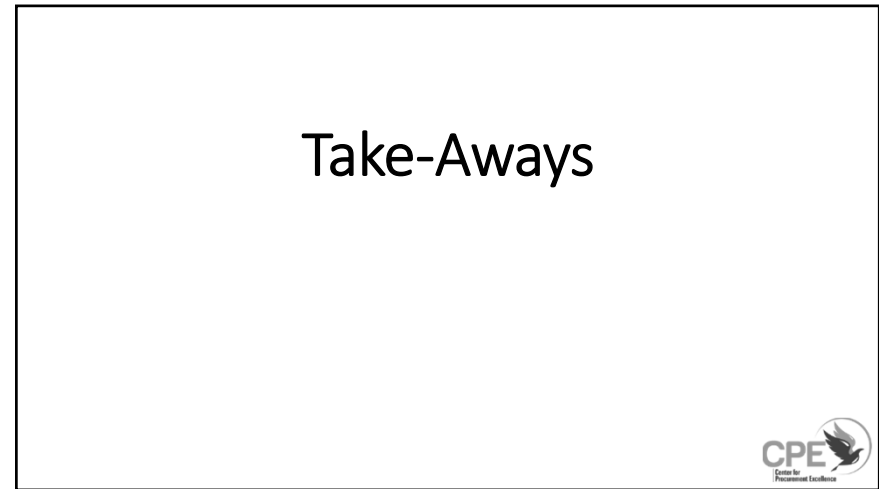
Summary

- Procurement schedule is an important element of every RFP solicitation
- General advertisement period is 4-6 weeks and 6-10 weeks for evaluation
- Provide the suppliers with as much time as possible to propose
- Stick to the schedule



Session 3 of 4: Proposal Submission Protocols and Evaluation Best Practices


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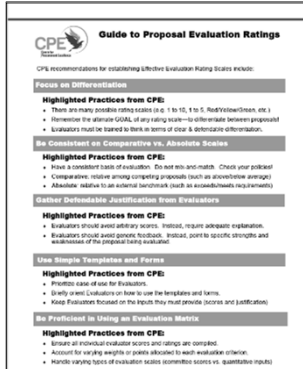
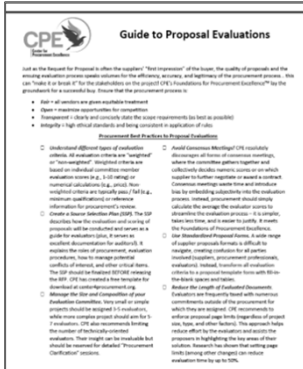
Evaluation Best Practices: Summary

1. Understand the Different Types of Evaluation Criteria
2. Establish a Source Selection Plan (SSP) before RFP release
3. Recognize that Evaluators have Bias
4. Balance the Evaluation Committee
5. Avoid Consensus Meetings!
6. Use Standardized Proposal Forms
7. Reduce the Length of Evaluated Documents
8. Use Effective Rating Scales
9. Conduct Effective Interviews
10. Be sure to track Return on Investment!


jeff@center4procurement.org



CPE's Guide to Proposal Evaluations



The image shows two document covers from the Center for Procurement Excellence. The left document is titled "Guide to Proposal Evaluations" and the right document is titled "Guide to Proposal Evaluation Ratings". Both documents provide detailed guidance on the evaluation process, including criteria, bias, and rating scales.



Session 3 of 4: Proposal Submission Protocols and Evaluation Best Practices

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Evaluation Training is Critical

- **Procurement / Buyers must be skilled at training their internal client teams on how to be better evaluators!**
 - Takes Soft-Skills → essentially acting as a “Teacher”
 - Can be difficult for younger / inexperienced Buyers
 - Right templates and tools for RFPs = much easier to accomplish!
- **Remember the “80/20” rule!!!**
 - Perhaps only 20% of transactions are RFPs... but might represent 80% of the dollars!



Thank you!

RFP Templates

General Construction
Construction Manager @ Risk (CMAR)
Roofing
Food Services Management and
Operation

RFP Tools

Source Selection Plan
Reasons to Release Your Budget
SOW Checklist

Would you like a Free Copy of the CPE RFP Roofing template?

Don't see the one you want? Contact us!

Jeff.Sawyer@center4procurement.org

