

Session 1 of 4: RFPs as Part of Procurement Excellence
center4procurement.org/rfp-training-course

RFPs as Part of Procurement Excellence

RFP Training Course



Agenda

- Introductions
- Solicitation Types
- Organizing a High-Performing RFP
- The Foundations of Procurement Excellence
- Putting “RFP Excellence” into Practice



Introductions



Center for Procurement Excellence (CPE)

CPE is a non-profit, 501(c)6 membership organization

MISSION

Improve effectiveness of RFPs for public and private organizations worldwide

GOAL

RFPs that emphasize the CPE Principles of Fair, Open, Transparent, Value, and Integrity

RESOURCES

Professional Development Training, RFP Templates, Advocacy



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Your Instructors



Your Instructors



Jeff Sawyer

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CPE specializes in
High-Performing RFPs



1) Prepare & Advertise

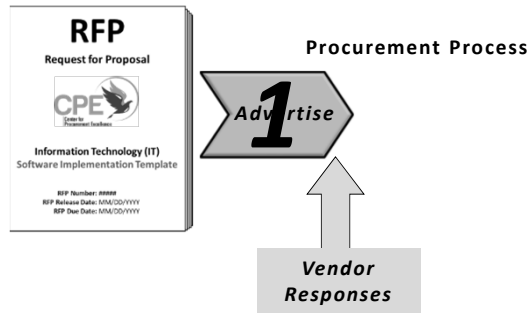


Procurement Process

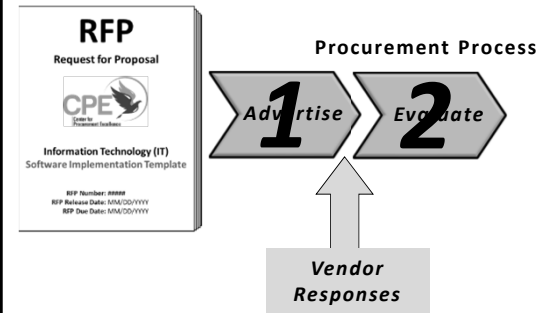


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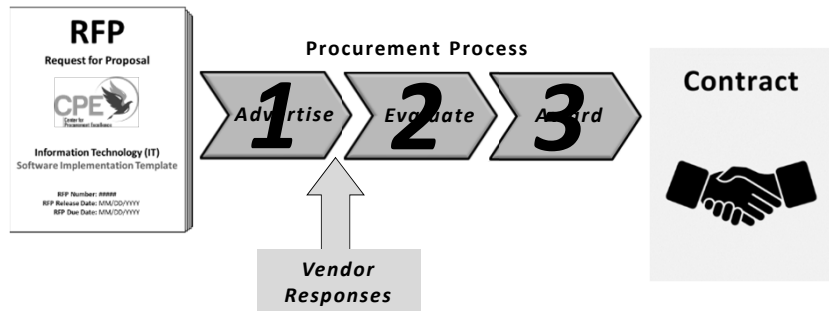
Vendors Submit Responses



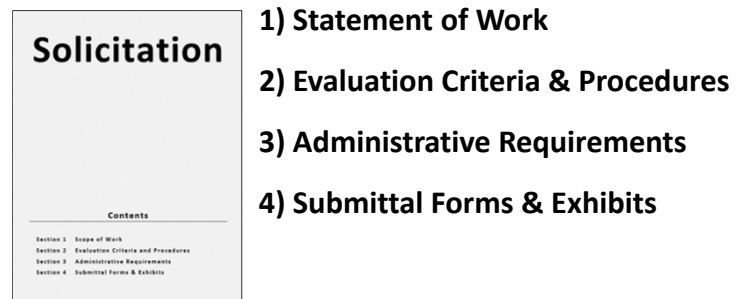
2) Evaluate Responses



3) Award Contract



Solicitation Contents



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Industry Acronyms

ITB RFP SOQ
RFQ RFT
SOI IFB
RFSQ



3 Types of Solicitations Based On Award Factors



3 Solicitation Award Factors

1. Award based on **Cost only**



2. Award based on **Qualifications only**



3. Award based on **Cost & Qualifications**



Solicitation 1 - Cost Only Award

Solicitation



Contents

Section 1: Scope of Work
Section 2: Evaluation Criteria and Procedures
Section 3: Administrative Requirements
Section 4: Submittal Forms & Schedule

Industry Acronyms

ITB - Invitation To Bid

RFQ - Request For Quote

IFB - Invitation For Bid

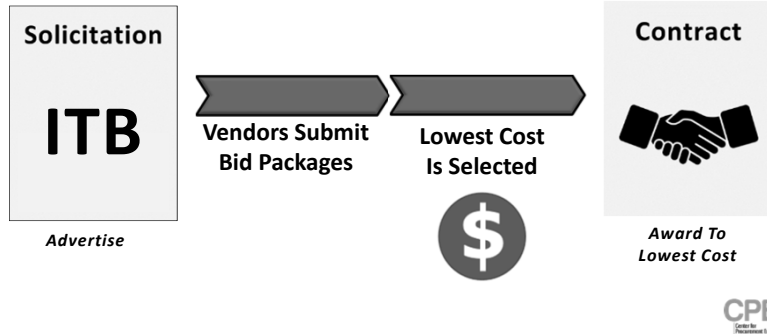
RFB - Request For Bid

RFT - Request For Tender



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ITB Mechanics



ITB Weakness #1 Treats Project/Service as Commodity



ITB Weakness #1 Treats Project/Service as Commodity

- Experience is not considered or valued
- Qualified personnel is not considered or valued
- Better solutions are not considered or valued
- Mitigating risks is not considered or valued
- Cost is only factor that is important



Approach to Financial Evaluation



- Traditional approach: largest percentage discount

	<u>Discount %</u>	<u>Furniture List Price</u>	<u>Final Price</u>
Dealer A	50%	\$10,000	\$5,000
Dealer B	58%	\$12,000	\$5,000

Average of Furniture Program Discounts: 60%



ITB Weakness #2
**Scope of Work
Must Be Accurate**



ITB Weakness #2
Scope of Work Challenges

- Complete
- Accurate
- Explicit



ITB Weakness #3
**Assumption That Vendors
Can Understand Your
Statement of Work**



ITB Weakness #3
Not Everyone Can Understand

- Vendors do not all understanding the same way
- Vendors do not all perceive the same way
- Vendors may not all know how to price your requirements



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ITB Weakness #4 Poor Performers Can Still Win

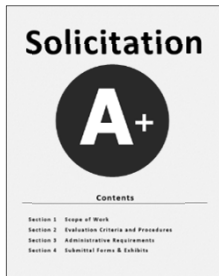


ITB Weakness #4 Poor Performers Can Win

- Experience is not considered or valued
- Qualified personnel is not considered or valued
- Better solutions are not considered or valued
- Mitigating risks is not considered or valued



Solicitation 2 - Qualifications Only Award

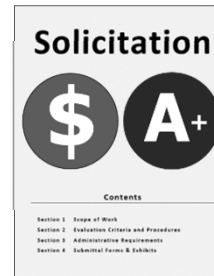


Industry Acronyms

RFQ – Request For Qualifications
SOQ – Statement Of Qualifications
QBS – Qualifications Based Selection



Solicitation 3 | Cost + Qualifications



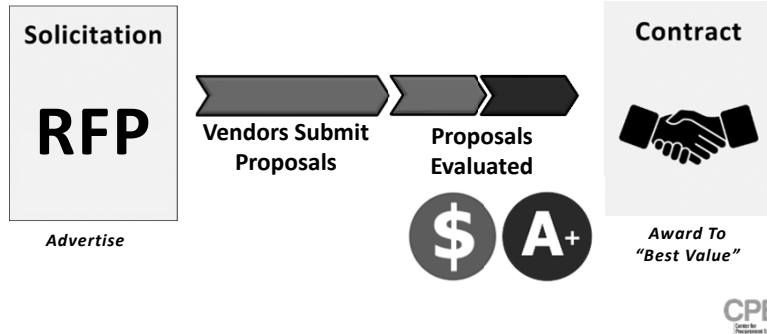
Industry Acronyms

RFP – Request For Proposals
RFS – Request For Solution



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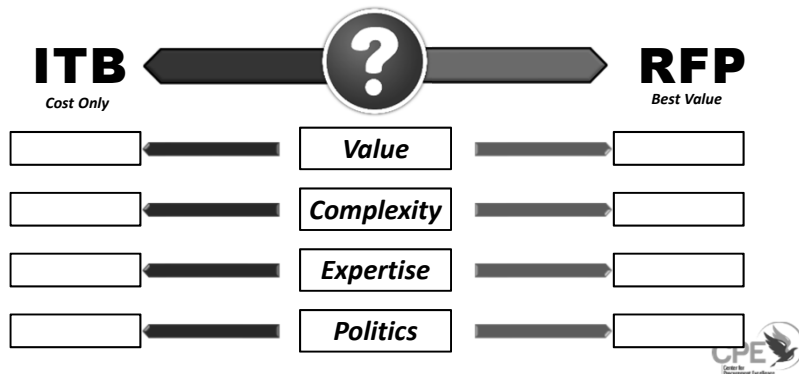
RFP Mechanics



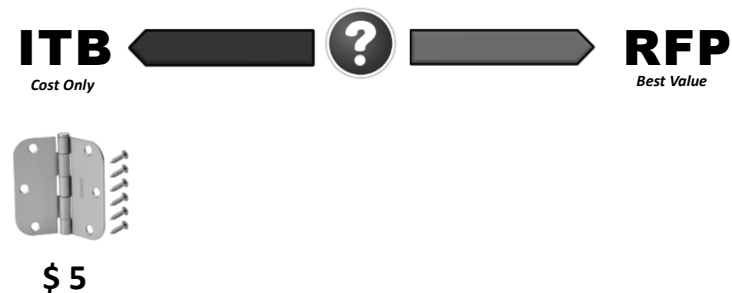
RFP Challenges

- **More complex** (multiple award factors)
 - **Requires more resources** (evaluation team, read responses)
 - **Evaluation takes more time**
 - **Decision is more difficult to defend** (they are opinions)
 - **Opportunities for collusion** (can be used to pick favorites)
- CPE logo in the bottom right corner.

Consider 4 Project 'Traits'



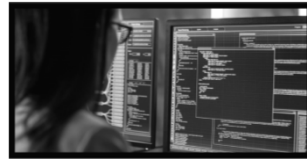
Value



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Value

ITB    **RFP**
Cost Only *Best Value*



\$ 500,000



Complexity

ITB    **RFP**
Cost Only *Best Value*



Complexity

ITB    **RFP**
Cost Only *Best Value*



Internal Expertise

ITB    **RFP**
Cost Only *Best Value*



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Internal Expertise

ITB    **RFP**
Cost Only *Best Value*



The Right Approach

ITB    **RFP**
Cost Only *Best Value*

Low \$		Value		High \$\$\$
Simple		Complexity		Complex
High		Expertise		Limited
Low		Politics		High



Why RFPs are Essential to Successful Project Outcomes



Importance of a High-Performing RFP

RFPs are a direct reflection of your organization and project.

Is your RFP...

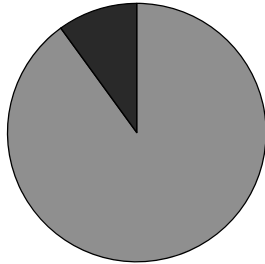
- Organized vs. Scattered?
- Professional vs. "Thrown Together"?
- Easy-to-Follow vs. Confusing?
- Tailored vs. Recycled?
- High-Performing vs. "Same Old"?



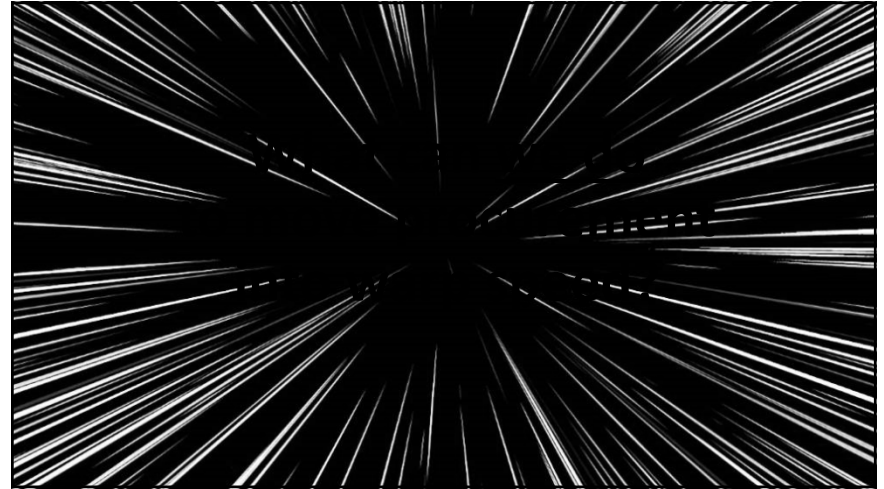
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All Procurements Are Urgent!

10% Extremely Urgent



90% Urgent



Common Things that Slow Down Procurement

- Poor quality Statement of Work.
- Procedural items that are “clunky” or poorly coordinated.
- Lack of commitment from users, evaluators, and/or executives.
- Lack of clarity on what (and how) to evaluate.
- Large volume of proposal materials.
- Lack of interest from high-performing vendors.



Goal:
Become a
“Client of Choice”



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What is a Client of Choice?

- Vendors want to propose on your project...
 - With their best people
 - In a thoughtful manner
 - With their most competitive pricing
- Internal Clients see RFPs as a Value-Creator...
 - Bring innovation
 - Identify the best approach
 - Bring solutions to minimize risk in execution

Because you are fast, efficient, organized, and professional!



Organizing a High-Performing RFP



Center for Procurement Excellence RFP Templates

RFP

Request for Proposal



Information Technology (IT)
Software Implementation Template

RFP Number: #####
RFP Release Date: MM/DD/YYYY
RFP Due Date: MM/DD/YYYY

Our Goal:

Organize & Simplify
a **High-Performing RFP**
for every Industry Sector
and Project Type



Center for Procurement Excellence RFP Templates

RFP

Request for Proposal



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Software Implementation Template

RFP Number: #####
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Keep In Mind:

Different Projects
require Different RFP Specifics.


Yet the RFP **Structure & Organization**
can remain the same!



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Center for Procurement Excellence RFP Templates

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Request for Proposal




Information Technology (IT)
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Why is this Important?


Your RFP is a “first view” for the
Vendor Community

The RFP **structure & content**
drives the RFP outcome!



Center for Procurement Excellence RFP Templates

RFP
Request for Proposal

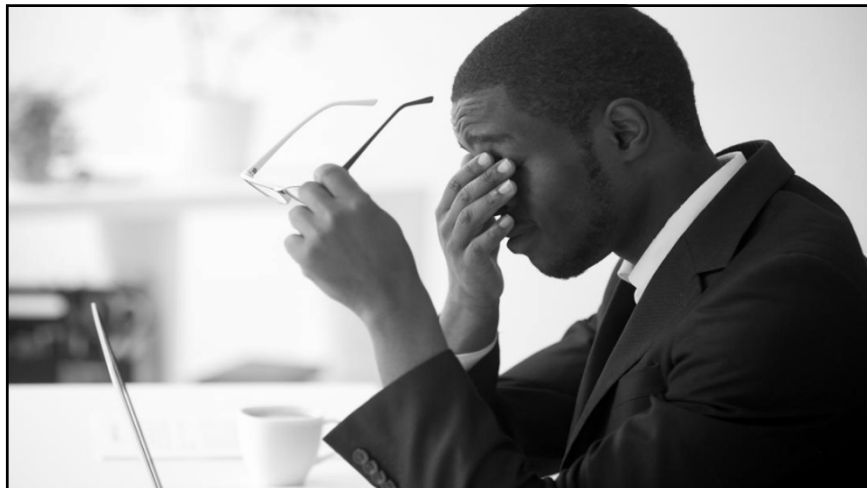



Information Technology (IT)
Software Implementation Template

RFP Number: #####
RFP Release Date: MM/DD/YYYY
RFP Due Date: MM/DD/YYYY


Goal: Organize a High-Performing RFP

- ⚠️ • Difficult to determine what to submit?
- ⚠️ • Increase the odds of missing a requirement?
- ⚠️ • Unreasonable and superfluous requests?
- ⚠️ • Necessitate lots of time to review?
- ⚠️ • Frustrate vendors?



Center for Procurement Excellence RFP Templates

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: Organize a High-Performing RFP

- ✅ • Easy to determine what to submit
- ✅ • Avoid disqualification
- ✅ • Highly organized and professional
- ✅ • Simple and fast for vendors to review
- ✅ • Less frustrating



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How we want Vendors to react to our RFP...

I'm so excited.



Ooooh,
I ♥ CPE's
RFP Templates!



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

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



Quick Example: It Pays to be a Client of Choice

Why Vendor Perspectives are so Important



Large Public University – \$80M Custodial

- 10 year total term
- Client concerns:
 - 1) Will we attract enough bidders to have a solid competition?
 - 2) What type of performance improvements are possible?
- We helped apply a High-Performing RFP to the project...



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Large Public University – \$80M Custodial

Results:

- 12 vendors pulled the RFP = good interest!
- 8 full bids = good competition!
- All 8 were compliant = no frustration!
 - Even with breakouts, where the scope was divided into 3 “zones” (as bid options) for a “best-in-class” approach.



Large Public University – \$80M Custodial

Results:

- \$500K per year direct cost savings due to competition
- Client’s effort reduced by 3 FTEs Client to over see QA/QC
- Service Performance – substantially above historic levels

Historic Rate (previous 5 years)	Year 1	Year 2	Year 3
85%	90.5%	92%	95%

*based on approximately 250 QA/QC inspections per year



Large Public University – \$80M Custodial

Key Points:

- Remember the big picture:
 - Attract vendor attention
 - Focus on a fair, open, transparent
 - Make it clear & easy for them
- Results in:
 - Increased participation
 - Better competition
 - Solutions & savings



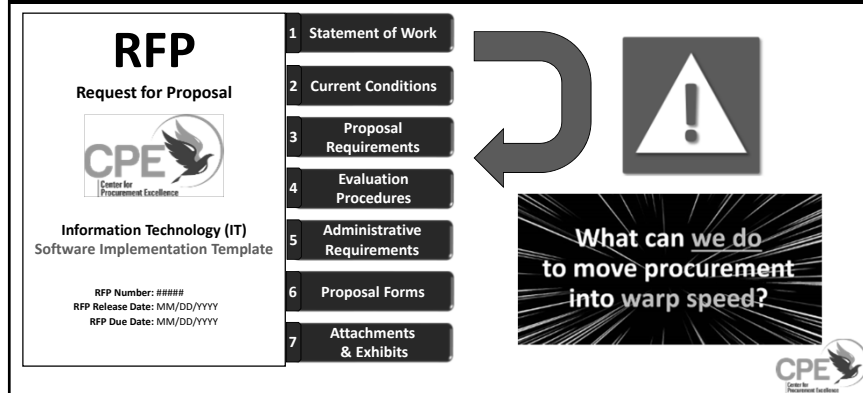
Organizing a High-Performing RFP



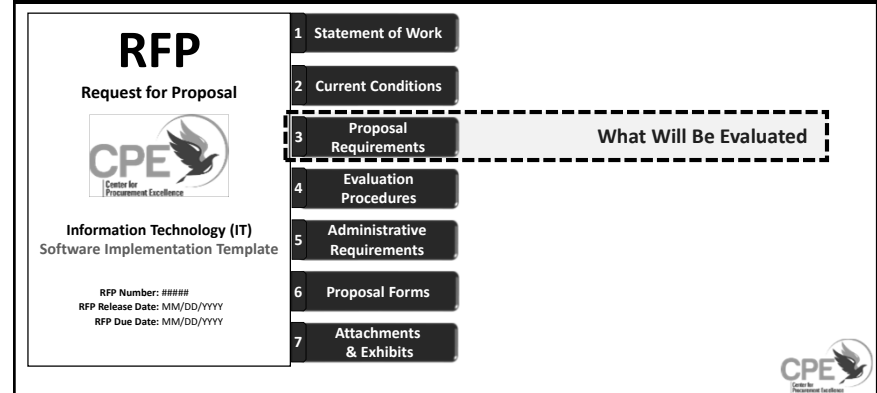
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Common Mistake: Mixing the Sections



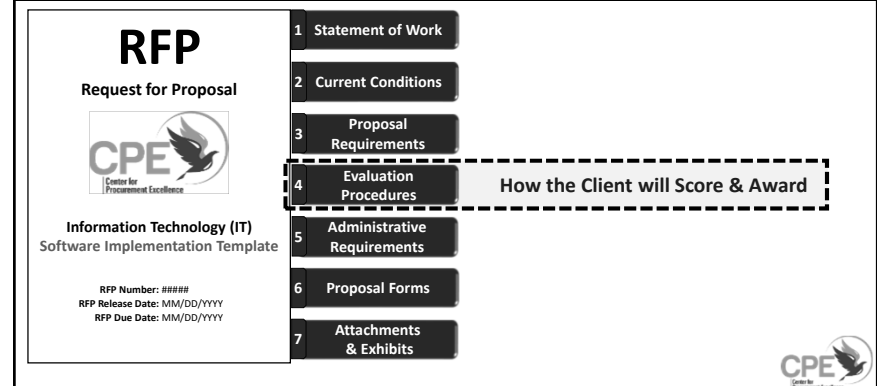
Organizing a High-Performing RFP



Proposal Requirements

- Provide brief, clear instructions of what you are looking for (what information & content you want to evaluate)
- Refer Vendors to the corresponding Proposal Forms.
- Keep it brief. Define Maximum Page Limits.

Organizing a High-Performing RFP



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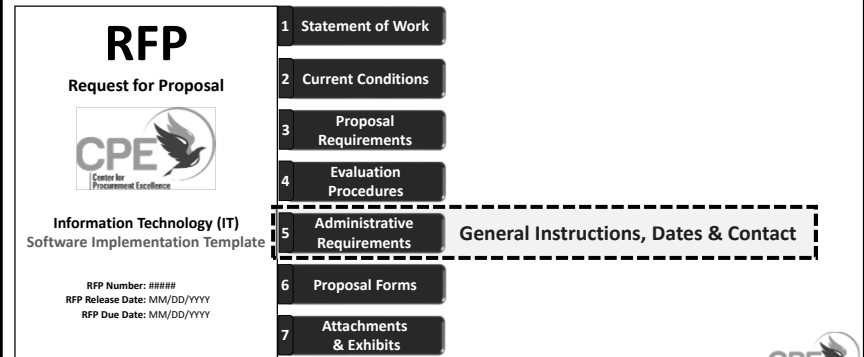
Evaluation Procedures:

In Session #3, we will cover:

- 9 specific evaluation best practices
- A variety of ethical consideration in procurement



Organizing a High-Performing RFP



Administrative Requirements

- Questions & Inquiries
- Addenda
- Procurement AND Evaluation Schedule
- Single Point of Contact
- Method of Submission
- General Terms
 - Ethics
 - Expenses
 - Rights & Disclaimers
 - Confidentiality
 - Debriefings
 - Etc.

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Administrative Requirements

- Questions & Inquiries
- Addenda
- Procurement AND Evaluation Schedule!!!
- Single Point of Contact
- Method of Submission
- General Terms
 - Ethics
 - Expenses
 - Rights & Disclaimers
 - Confidentiality
 - Debriefings
 - Etc.

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Organizing a High-Performing RFP

RFP
Request for Proposal




Information Technology (IT)
Software Implementation Template

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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

Forms to Complete



Take Charge: Client-Defined Proposal Forms!!!

- Know what you are looking for... and ask for it!!!
- Eliminate all other marketing fluff. It does not add value.
- Make it easy!!!
- RFPs can be large documents.
- Vendors only have so much time to spend!

Take Charge: Client-Defined Submittal Forms!!!

SUBMITTAL FORM C-2
Experience (Critical Project Team Members)

Instructions: Refer to Section 3.2 for format and responsibilities for each Critical Project Team Member. The only information required to be anonymous. The only information required to be anonymous.

Insert Critical Project Team Member Anticipated Time Allocation to the Project

Brief Narrative of Roles and Responsibilities (add space as needed)

Resume (add space as needed)

SUBMITTAL FORM B
Experience & Qualifications

Software Company Experience

Provide information regarding the experience of the Software Company. The information below must ONLY apply to the current version of the Software Solution being proposed and which your Software Company has implemented over the past five years. Only solutions that are 100% complete and operational can be counted (on-analysis).

Software Solution	Year Implemented
000140590101010101	000140590101010101
000140590101010101	000140590101010101

Software Company. The information below must only be provided for the implementation team that are 100% complete and the system is operational. Solutions cannot be counted in the analysis.

Software Solution	Year Implemented
000140590101010101	000140590101010101
000140590101010101	000140590101010101


Team Members proposed in Submittal Form A:

Project Manager	Project Engineer	Project Analyst	Team Lead

What can we do
to move procurement
into warp speed?

Example from Public-Private-Partnership Design-Build-Finance Project

Example from Software Implementation Project



Common Mistake: Mixing Requirements

3.8 Method of Operation

3.8.1 The Contractor should be able to provide the recommended items that are listed in Attachment 1 of this RFP. Additional and/or comparable products should also be offered.

3.8.2 UH has the option of selecting any Grab-and-Go items from the recommended listed items (see Attachment 1). The selection of Grab-and-Go items and quantities will vary based on UH volume of sales and customer requests. If Contractor no longer offers a product listed in this RFP, Contractor shall notify UH and provide a comparable alternative.

3.8.3 The Contractor and the Department of Food and Nutrition Services will monitor together the volume and sales of the Grab-and-Go items and determine from the recommended list which items will be offered for sale in the UH cafeteria (and possibly other locations at UH).

3.8.4 The Contractor must provide an invoice for every order to the Department of Food and Nutrition Services and the Department of Accounts Payable. All invoices must include the UH Purchase Order Number.

3.8.5 The Contractor must provide, upon request of the Department of Food and Nutrition Services, weekly, monthly or yearly reports of all the Grab-and-Go items that were purchased including quantity and pricing.

WE HAVE READ AND SHALL FULFILL THE REQUIREMENTS OF SECTION 3.8
The bidder must indicate by putting a check mark in the appropriate box marked
Y (Yes) N (No).

--	--	--	--	--	--	--	--	--	--

Avoid fill-in-the-blanks throughout other sections of the RFP.


Keep everything in the Submittal Forms
(fill-in-the-blank & checkboxes are great there!)

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- 4 Evaluation Procedures
- 5 Administrative Requirements
- 6 Proposal Forms
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Additional Information that may be helpful to Vendors.

But don't want to "clog up" the other sections.

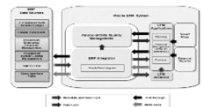
Supplemental Information

Attachments & Exhibits


• Examples of Supplemental Information (IT Software):

Architecture Diagrams

Current State:



Future State:




List of Pain Points


Use Cases

Workflows

Rebate Workflow:



Discount Workflow:



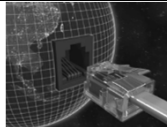
Dashboards & Forms

Glossary of Terms

What can we do to move procurement into warp speed?

Background

- Budget: **\$50M** | 5-year contract
- Service components [separate evaluations]
 - Wired Telephony
 - Data Network Services
 - Video Conferencing Services
 - End User Support (Help Desk)



Existing conditions

- 500 access sites; 77 video end points; 1,400 routers
- 6,200 phones; 30.4M annual phone minutes
- 175 data centers
- 17,000 government staff members



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Risk – Data Networks

No	Criteria	Possible Points	Data Network	
			Firm A	Firm B
1	Price (\$M)	200	\$ 8.4	\$ 4.8
2	Risk Assessment	175	9.6	8.6
3	Value Assessment	125	9.2	7.5
4	Interviews	300	7.1	7.5
5	Multiple Bundle Incentive	50	10.0	10.0
6	Alaska Offeror Preference	100	10.0	10.0
7	PPI	50	9.7	10.0
Total Points		1000	897	919

- Risk: Firm B cost is 45% less
- Asked Firm B to substantiate how they know cost is accurate



Evidence for Lower Cost

1. Cost proposal is in line with Lower 48's cost

Current Lower 48 Data Network Service Rates				
Service	Term	Monthly Lower 48 Price	State of Alaska Monthly Budget	Proposed Monthly Price
2 Gb Data Network Services & Internet	60 Months	\$30,280	\$208,333	\$40,000

2. Recent cost comparison for local municipalities for similar service [justifying the 70% difference from budget]

Client	Previous Rate	2014 Rate	% Decrease
Large School District - Alaska	\$160/Mb [2010]	\$29/Mb	86%
Large Multi-National Carrier - Alaskan Business	\$120/Mb [2008]	\$25/Mb	80%
Mid-to Large-Size Alaska-Based Company	\$50/Mb [2011]	\$25/Mb	50%

Cost per Mb decreased by 78%



Benefits to the State of AK

Criteria	Previous Contract	New Contract	Difference
Wired Telephony	\$5.0M	\$3.8M	25% savings
Data Network	\$2.5M	\$0.5M	80% savings
Video-Conferencing	\$1.0M	\$0.7M	30% savings
End-User Support	\$1.5M	\$0.2M	85% savings
Network speed	500 mbps	2 Gbps	400% increase
RFP to Award duration	6-8 months	4 months*	45% savings
Structured pre-planning	No	Yes	--
Overall satisfaction with RFP process and vendors	--	100%	--

*including contract pre-planning



Other Client Comments

"We struggled to put together an RFP that fully and accurately described all of our technical needs. However, with best value, *we rely on the expertise of our vendors* to help identify what is needed. We spent less time trying to figure out our RFP, and more time on pre-planning the implementation."

"With such a wide-reaching and complex service, the evaluation process was *surprisingly simple*. The proposals were simple, concise, and the difference between proposers was obvious."

"We were concerned about the problems that might come with transitioning to a new provider. The *clarification phase minimizes confusion*, and helps ensure that all parties' expectations are aligned."



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Putting “RFP Excellence” into Practice

Tips for Different Project Types



High-Performing RFPs for Every Project Type

RFP

Request for Proposal



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Software Implementation Template

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- 2 Current Conditions
- 3 Proposal Requirements
- 4 Evaluation Procedures
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Our Goal:

CPE's Organized & Simplified
Structure **Remains the Same!**

But the
content, details & language
are tailored to each
specific Project Type!



High-Performing RFPs for Every Project Type

CPE's Expertise Includes...

- **Information Technology**
 - Typical Software Implementation
 - Major Software Implementation (ERP, etc.)
 - System Integrator
 - Hardware
 - Organizational Change Management
 - Professional Services
- **Business & Professional Services**
 - General Business Services
 - e.g. Audio-Visual, Audit, Banking, Bookstore, Customs, Insurance, Marketing, Medical, Moving, Pensions, Printing, etc.
- **Facility Management & Operations**
 - Food/Dining Services
 - Janitorial/Custodial
 - Waste Hauling/Waste Management
 - Operations & Maintenance
 - e.g. MEP/HVAC, Elevators, Safety Valves, Pest Control, Cold Beverage/Pouring Rights, Snow Removal, AMI, Underground Locates, Wireless Telecom, Furniture, Cleaning Products, Security, Landscape, Parking, etc.
- **Design & Construction**
 - Architecture/Engineering Services
 - D-B-B General Contractor
 - D-B-B Construction Roofing
 - Design-Build (DB)
 - Construction Manager at Risk (CMAR)
 - Public-Private-Partnership (P3)
 - IDIQ / JOC / On-Call / VoR / Standing Order




Workshop RFP Assessment

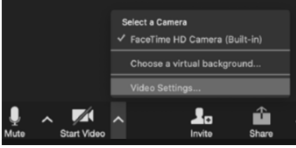
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Zoom!



- Turn on your video & audio!




- Share your screens to collaborate!
- Have fun & introduce yourselves!
 - Name, Organization, LOCATION




Your tasks

1. Using the “RFP Report Card” form, evaluate the UCLA RFP
 - individually or conquer & divide... your choice
2. Prepare a response to the following questions:
 - What are the Top 2 things that could be improved in the RFP?
 - Explain how would this affect the owner being a “Client of Choice”



Your tasks

1. Using the “RFP Report Card” form, evaluate the Amazon RFP
 - individually or conquer & divide... your choice
2. Prepare a response to the following questions:
 - What are the Top 2 things that could be improved in the RFP?
 - Explain how would this affect the owner being a “Client of Choice”



The Foundations of Procurement Excellence



Session 1 of 4: RFPs as Part of Procurement Excellence
center4procurement.org/rfp-training-course

Foundations of Procurement Excellence

- Fair
- Open
- Transparent
- Value
- Integrity

For each, let's discuss:

What does it mean?
Why is it important?
How to accomplish it?



Foundations of Procurement Excellence

- **Fair:** provide all vendors with an equal opportunity to win.

- Open
- Transparent
- Value
- Integrity



Fair: Equal Opportunity to Win

Perceptions of Owner being Unfair or Unequal

- Pre-Conceived
- Restrictive
- Too Fast
- Unrealistic
- Too Much
- Biased
- Misunderstands Needs
- *Discourages Vendors!*

Impact

- Fewer proposals
- Lower quality proposals
- Less qualified teams
- Less competitive pricing
- Less consistent pricing
- Open to interpretation
- Have to believe the vendor
- *Brings Risk to the Project!*



Foundations of Procurement Excellence

- **Fair:** provide all vendors with an equal opportunity to win.

- **Open:** encourage and maximize competition.

- Transparent
- Value
- Integrity



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Open: Encourage and Maximize Competition

Who knows the most about
delivering the required services?

An Expert
Vendor



Foundations of Procurement Excellence

- **Fair:** provide all vendors with an equal opportunity to win.
- **Open:** encourage and maximize competition.
- **Transparent:** provide a clear, concise & accurate process.
- **Value**
- **Integrity**



Transparent: Clear, Concise, and Accurate

Highlighted Practices from CPE:

- **Clear:** release your budget and schedule constraints.
- **Concise:** define what you want (with maximum limits).
- **Accurate:** seek to maximize differentiation.



Foundations of Procurement Excellence

- **Fair:** provide all vendors with an equal opportunity to win.
- **Open:** encourage and maximize competition.
- **Transparent:** provide a clear, concise & accurate process.
- **Value:** optimize the organization's return for the spend.
- **Integrity**



Value: Optimal Return for the Spend

Low-Bid and
Overly Price-Focused RFPs
both squeeze out value
and increase change orders.



Foundations of Procurement Excellence

- **Fair:** provide all vendors with an equal opportunity to win.
- **Open:** encourage and maximize competition.
- **Transparent:** provide a clear, concise & accurate process.
- **Value:** optimize the organization's return for the spend.
- **Integrity:** ensure confidence & trust with high ethical standards.



Integrity: Ensure Confidence and Trust



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



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Damage to Rocket-Launch Structure

Is There Anything You'd Do Differently?



Kickoff Planning – Increasing Transparency (Demolition & Site Prep)

- The contractor proposed an alternative procedure for removing damaged steel panels:
 - *\$1 Million cheaper than the specified process*
 - *Faster than the specified process*
 - *Safer than the specified process*



Final Result

- Finished ahead of schedule
- 0 change orders or cost increases
- User saved 60% in cost compared to the average



Update Jan 2017



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Putting RFP Excellence Into Practice

- Fair
- Open
- Transparent
- Value
- Integrity



Putting “RFP Excellence” into Practice



See
handouts
section

Center for Procurement Excellence

FORM-5520[®]

Request For Proposal
Roofing Services

<<INSERT ORGANIZATION NAME>>

<<INSERT PROJECT NAME>>



Summary



Session 1 of 4: RFPs as Part of Procurement Excellence
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Putting RFP Excellence Into Practice

- Major tool in becoming a Client of Choice.
- Instrumental to successful project outcomes.
- Learnable skills that can be put directly into practice.
- Part of a network of professionals that openly share “Next Practices” (not just current practices)



Putting RFP Excellence Into Practice

CPE support RFP Excellence via...

- Webinars & Professional Development
- In-Person Training & Interactive Workshops
- RFP Tools, Templates, and Process Steps
- Policy Guidelines for RFP Excellence



CPE Document Warehouse

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

RFP Library

Don't see the one you want? Contact us!
Jeff.Sawyer@center4procurement.org



Look Ahead to Upcoming Sessions



Session 1 of 4: RFPs as Part of Procurement Excellence
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Course Structure for “Better RFPs, Better Projects”

- **Session 1:** RFPs as Part of Procurement Excellence
- **Session 2:** High-Performing SOW (and Current Conditions)
- **Session 3:** Proposal Submission Protocols & Evaluation Best Practices
- **Session 4:** Procurement Ethics, Conflicts of Interest, and Vendor Debriefings... Oh My!



Please Complete the Pre-Survey!



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**Acknowledgment of
Research & Support
from  SIMPLAR**



Simplar Provides...

- **Additional advanced practices for in the areas of:**
 - SOWs, RFPs, Project Delivery, Performance Measurement, and Organizational Change Management
- **Hands-on project support for all of the above.**
- **Customized on-site training for all of the above.**

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