

Organizing a High-Performing RFP



Jake Smithwick, PhD, MPA
Director of Education
Jake.Smithwick@uncc.edu

Download Today's Slides & Resources

center4procurement.org/mmcap/



20+ Years | 150+ Owners

3,000+ Projects | \$15+ 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



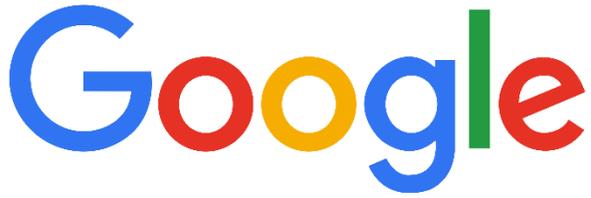
PROJECT PARTNERS AND PARTICIPANTS:

BEST IN CLASS

- 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



Environment Protection Authority Victoria



uOttawa



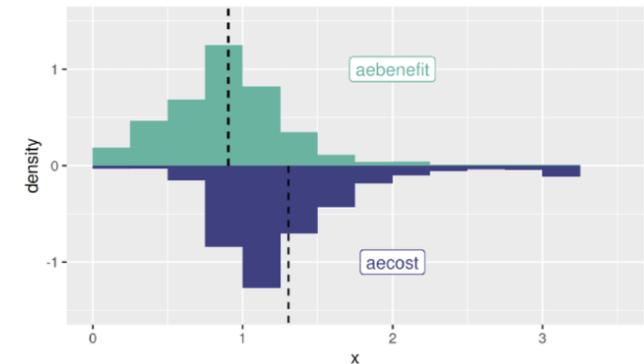
NATIONAL ACADEMY OF SCIENCES



Current “Solutions”

- “Better” contracts, “Alternative” Delivery
 - DB to CM to CMAR to IPD to
 - Technology
 - Financial adjustments
- None have proven to not be enough to drive consistently high performance outcomes on projects (even in past times)
- Procurement often overemphasizes the power of a contract to drive performance and protect the organization from non-performance
- Many organizations struggle to show value in the work and performance that is received – getting “finished” is not enough of a performance metric to use to make economic and org decisions

Study: Cost-Benefit Analyses for Projects Are 'Worse than Worthless'



October 8, 2021

Peter Reina

KEYWORDS [construction projects](#)
[/ cost / economic analysis](#)

[Order Reprints](#)

A large new global study of project performance over 86 years confirms that ingrained optimism bias results in forecast-based cost-benefit analyses “so misleading as to be worse than worthless,” say UK researchers. While construction technology and practice have developed over the decades, failures of cost-benefit analysis “seem universal across space and time,” they add.

<https://www.enr.com/articles/52612-study-cost-benefit-analyses-for-projects-are-worse-than-worthless>

Performance Problems



Reality



Reality of the Situation

- Performance in built environment (construction, design, FM work) **has been proven to NOT correlate** to contract types, delivery methods, software, design quality, etc.
- Performance on built environment work **HAS BEEN PROVEN to highly correlate** to the capability, skill, and experience of the people doing the work – the critical personnel on a project – PM, SS, Client Lead, Design Arch, Key Engrs, Critical Sub SS, FM, technicians, etc.

Importance of the People

The ability to realize

innovation,

risk minimization,

value creation, &

cost reduction

**will not exceed the capability
of the people doing the work**

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

**Are You Writing RFP's And
Not Getting Any
Responses???**

Case Study

- Challenges with performance of procured services
- How fair is the procurement process
- How transparent is the procurement process
- What is most important to the owner
- What is their overall satisfaction with the owner

Vendor Perceptions

56 Contractors

CONTRACTOR ASSESSMENT

Regarding Experiences With The State of Tennessee

OVERVIEW

Researchers from Arizona State University conducted two separate surveys on contractors that perform work with the State of Tennessee. The first survey was performed in person (Nashville) at a general educational presentation (on August 15, 2016). During the presentation, contractors were asked to provide feedback regarding their experiences working with the State of Tennessee. The second survey was performed online (September 30, 2016), by sharing the survey link with the Associated General Contractors (AGC) of TN. The contractor responses were collected anonymously. The results of the survey are shown below.

SURVEY RESULTS

56 Contractors responded to the anonymous survey

31% believe that the procurement process is fair, and all vendors have an equal opportunity to win the contract

21% believe that the procurement process is clear and transparent (they understand the criteria that they will be evaluated on, and how the scoring will be performed)

75% believe that the State is more concerned about lowest cost rather than highest value

89% believe that Contractors should be awarded projects based on their overall value

31% believe that the Scope of Work contained in each solicitation is complete & accurate

42% Satisfaction with the Designers that are selected by the State of TN

Overall Satisfaction with State of TN = 31%

Overall Satisfaction with other Owners they work for = 80%

COMPARISON

The following table provides a comparison to 3 other Public Agencies that have performed similar vendor benchmarking and analytics.

CRITERIA	STATE OF TN	3 PUBLIC AGENCIES
1. The procurement process is clear and transparent	21%	85%
2. The procurement process is fair	31%	68%
3. The Organization is more concerned about lowest cost rather than value	75%	66%
4. Overall satisfaction with the Organization	31%	77%
5. Overall satisfaction with other Organizations	80%	79%
6. Total number of vendor responses	56	147

Vendor Perceptions

56 Contractors

31% believe the process is fair

69% believe that vendors do not have an equal opportunity to win the contract

75% believe that the State only cares about lowest price versus getting overall value

31% overall satisfaction rate with the State (compared to 80% with other owners)

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What impacts would this have if you were a vendor?

CONTRACTOR ASSESSMENT
Legal & Regulatory | With The State of Tennessee

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SURVEY RESULTS

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- 31% believe that the procurement process is fair
- 21% believe that the procurement process is clear and transparent
- 75% believe that the State is more concerned about lowest cost rather than highest value
- 89% believe that Contractors should be awarded projects based on their overall value
- 31% believe that the Scope of Work is complete & accurate
- 42% Satisfaction with the way the State treats its Contractors

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

COMPARISON
The following table provides a comparison of the 3 major Public Agencies that were polled and the vendor benefits and analysis.

CRITERIA	STATE OF TN	3 PUBLIC AGENCIES
1. The procurement process is clear and transparent	21%	85%
2. The procurement process is fair	31%	69%
3. The Organization is more concerned about lowest cost rather than the overall value	75%	77%
4. Overall satisfaction with the State of Tennessee	31%	80%
5. Overall satisfaction with other Owners they work for	80%	80%
6. The way the State treats its Contractors	42%	42%



If Vendor Perceive That Process Is Not Fair

Who bids

Quality of the bid

Quality of the team assigned

Quality and Performance of the services

Supplier Perceptions Matter!



**RFP
Solicitation**



The RFP Solicitation

What Is The Primary Goal Of The RFP?

What Is The 'Primary' Objective

- Follow procurement policies and regulations?
- Minimize the risk of protest?
- Create a document that transfers risk to the supplier?
- Create a document that protects the owner/organization?

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?

**These should not be
your primary objectives!**

What Is The Primary Goal Of The RFP?

Help us award to a high-performing supplier



Important

We must first ***attract the best*** suppliers/solutions to your RFP

What Type Of Suppliers Do You Want To Attract?

Supplier A



Supplier B





Suppliers Have Options

Are High Quality
Vendors Waiting
Around For Your
Project To Hit The
Street???



Reality

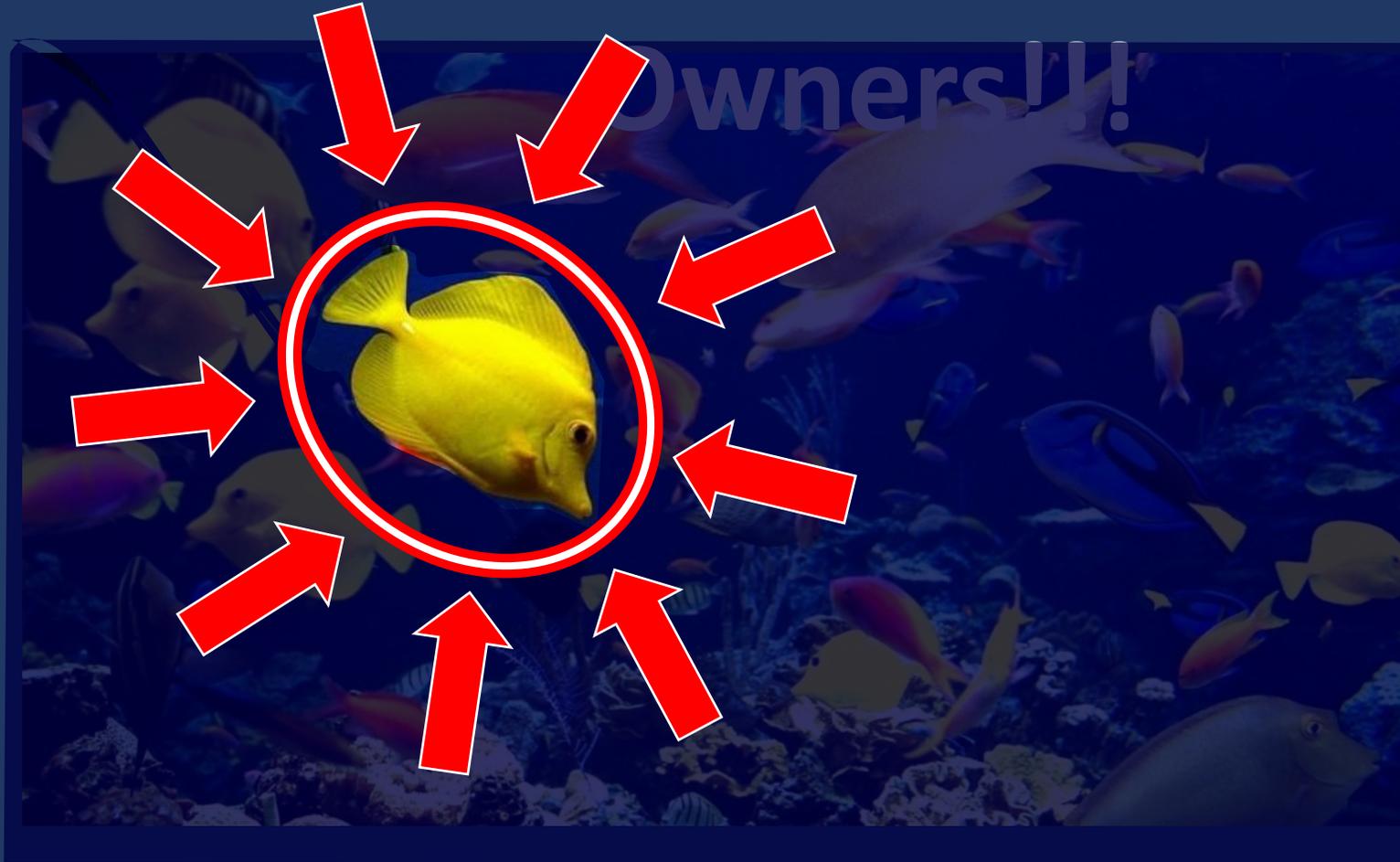
- Most high-quality vendors/suppliers are in high demand / busy
- High quality vendors/suppliers are not just sitting around all year for the “hope” that your organization will issue a solicitation
- Vendors are constantly looking at opportunities (outside of your organization)

Understanding Supplier Perspectives
Many Times We Forget...

You Are Not The Only “Fish” In The Sea... Vendors Have Options!



Your Goal: You Want To Look More Attractive Than All Other Current



If You Look Dangerous....





Your “Name” Doesn’t Matter

*Everyone Wants
To Work With
Us!!!*



Relying on your organizations
name is a poor strategy



Proposals Cost Money

Suppliers Don't Have Unlimited Funds



Proposing Costs Money

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

The background of the slide features a stack of books, with the spines of several books visible. The books are in various shades of blue and green. A semi-transparent blue overlay covers the entire image, creating a professional and academic atmosphere.

Workshop

RFP Assessment

Your tasks

1. Using the “RFP Workshop Instructions” form (pg.109), 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”

#1 - UCLA RFP

1. Using the RFP Report Card, evaluate the **UCLA** RFP. Do this individually or as a group.

2. As a group, prepare a response to the following questions:
 - a. **What are the Top 2 things that could be improved in the RFP?**

- b. **Explain how this would affect the owner being a “Client of Choice”.**



RFP REPORT CARD

ORGANIZATION/RFP NAME: _____

PROJECT NAME: _____

ASSESSMENT DATE: _____

EVALUATION SUMMARY

SCORE	RFP Area
	Overall Format of Solicitation
	Statement of Work
	Submittal Forms and Attachments
	5 Foundations of Procurement Excellence
	OVERALL GRADE A B C D F (circle one)

FEEDBACK & ANALYSIS:

Strengths:

- _____
- _____



Organizing a High-Performing RFP

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

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

2 Current Conditions

3 Proposal Requirements

4 Evaluation Procedures

5 Administrative Requirements

6 Proposal Forms

7 Attachments & Exhibits

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Where You Are At

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What Will Be Evaluated

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How the Client will Score & Award

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General Instructions, Dates & Contact

6 Proposal Forms

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Forms for Vendors to Complete

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Supplemental Information

Organizing a High-Performing RFP

RFP

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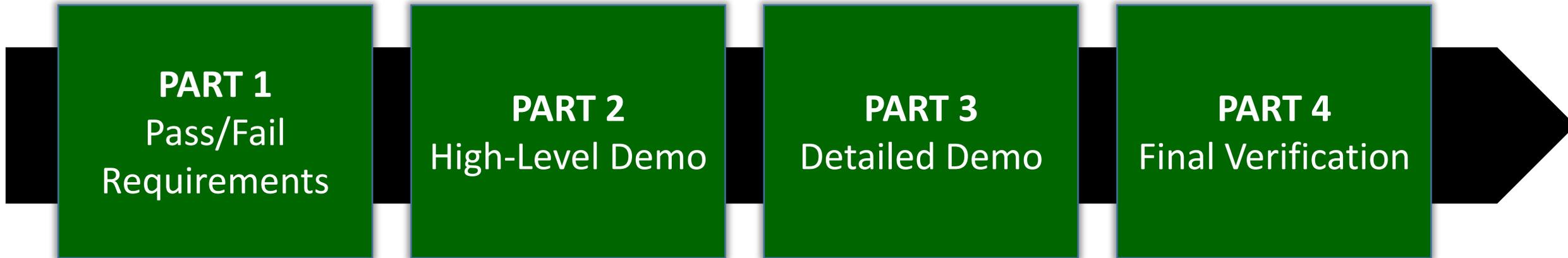
Evaluation Best Practices

Evaluation Expectations

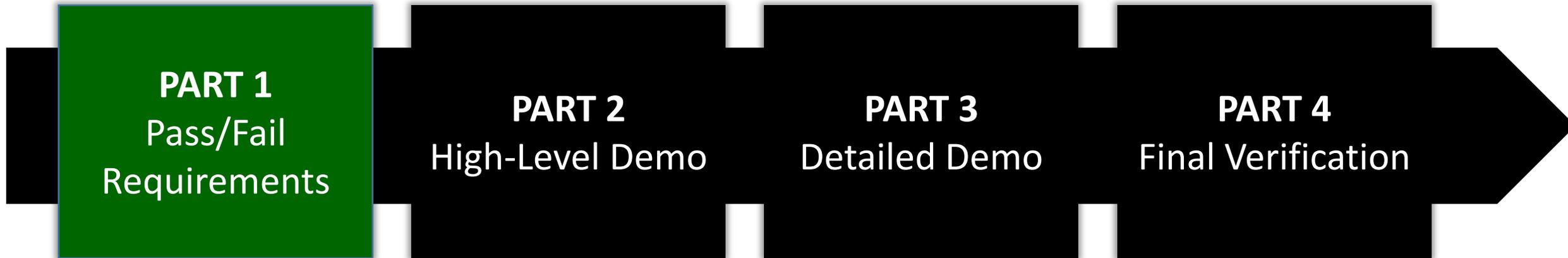
- Current expectation to have 40+ evaluators
- Unlikely to find a date/time that will work for all 40+ people
- Unlikely that 40+ people will be able to take days/weeks off work to participate in this procurement (not a realistic goal)
- Unlikely to have suppliers perform multiple demos at different dates/times



Break Up Procurement Into 4 “Major” Blocks



Pass/Fail Evaluation



- If supplier does not meet requirement, they are disqualified
- For Example: *“Pump must have wifi capabilities”*

Part 2 – High Level Demo



- Supplier will provide a “high-level” demo of the pump
 - Cover basic operations, functionality, codes/alerts, etc.
 - 1 hour
 - Virtual (not in-person). CMH will record demo

3 Different Projects!

- Teams must understand that we are really running 3 different evaluations at the same time (Large Pumps, Syringe Pumps, and PCA Pumps)
- It will help simplify the process if we begin treating these as “separate” projects:
 - We may have different requirements per pump
 - We may need tailored (different) demo scripts for each category of pump
 - We may need different evaluators for each category of pump

Time Requirements



- IMPACT: Evaluators will only need to set aside maximum of 2/3 hours (if they are only evaluating 1-pump category)

Vendor	Large Volume Pumps	Syringe Pumps	PCA Pumps
Vendor 1	X		
Vendor 2	X	X	
Vendor 3	X	X	X
Vendor 4			X
Total Hours	3 hours	2 hours	2 hours

Part 3 – Technical Demo



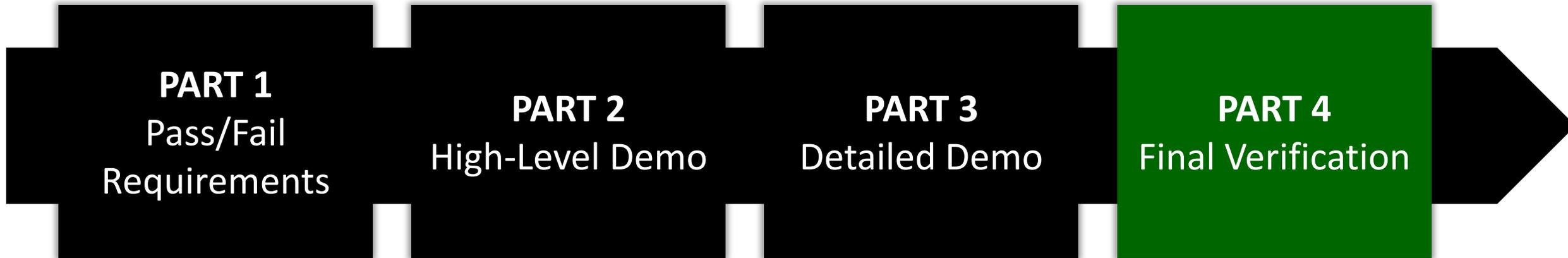
- CMH will perform a “detailed” demo of the pump
 - Test library scenarios (that have been developed by internal teams)
 - 2 hours
 - In-person

Detailed Demo Script

LARGE PUMP SCENARIOS

PATIENT TYPE	TEST
0.7 kg patient ICN	TPN 31 mL @ 1.3 ml/hr dispensed in bag with 100 mL overflow
0.7 kg patient ICN	Lipid 11 mL @ 3 gm/kg/day (pharmacy dispenses 100 ml bag)
67 kg patient PICU, Blood products	Ampicillin/sulbactam 2000 mg/100 mL over 15 minutes
53 kg patient Hem/Onc	Methotrexate - high dose 19 g/840 mL over 4 hours
FHC MOM	Oxytocin for FHC - 30 unit/500 mL @1 milliunit/min with titration
FHC MOM	Oxytocin for FHC - 30 unit/500 mL @334 ml/hr post-delivery for 30 minutes, then decrease rate to 95 ml/hr for remaining volume
FHC MOM	Oxytocin for FHC - 30 unit/500 mL @1000 ml/hr for uterine bleeding
FHC MOM	Vancomycin 1.5 m/300 mL over 90 minutes

Part 4 – Final Verification



- Before any final decision is made...CMH will have a final opportunity to drill down further and ask any follow-up questions, or request any additional tests (to validate and verify their compliance with any mandatory requirement)
- This is a final safety-check to make sure nothing falls through the cracks

The Foundations of Procurement Excellence

See handouts section



5 Foundations of RFP Excellence

CPE supports these 5 Foundations of RFP Excellence in all procurement processes as they enable organizations to become a “Client of Choice” and attract High-Performing Vendors across their entire project portfolio

Fair: provide all vendors with an equal opportunity to win

Highlighted Practices from CPE:

- ◆ Protect the good of the public and the organization
- ◆ Follow a realistic procurement schedule
- ◆ Minimize bias in evaluations

Open: encourage & maximize competition

Highlighted Practices from CPE:

- ◆ Reduce “upstream” restrictions on who can propose
- ◆ Avoid burdensome submittal requirements

Foundations of Procurement Excellence

- **Fair**
- **Open**
- **Transparent**
- **Value**
- **Integrity**

Foundations of Procurement Excellence

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

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Foundations of Procurement Excellence

- **Fair:** provide all vendors with an equal opportunity to win.
- **Open:** encourage and maximize competition.
- **Transparent**
- **Value**
- **Integrity**

Open: Encourage and Maximize Competition

Who knows the most about
delivering the required
services?

**An Expert
Vendor**

Foundations of Procurement Excellence

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Foundations of Procurement Excellence

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

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

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- **Integrity:** ensure confidence & trust with high ethical standards.

Integrity: Ensure Confidence and Trust



Foundations of Procurement Excellence

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- **Value:** optimize the organization's return for the spend.
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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



Minotaur Rockets



“Mishap”





Damage to Rocket-Launch Structure

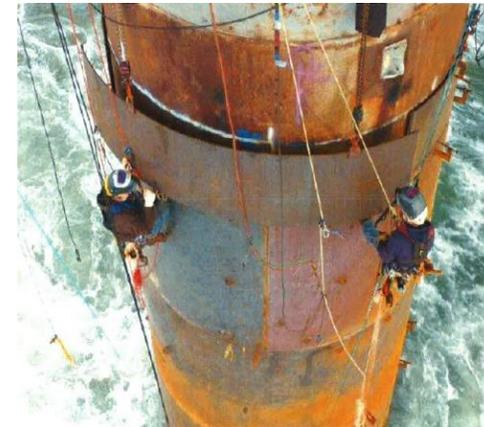
Is There Anything You'd Do Differently?



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

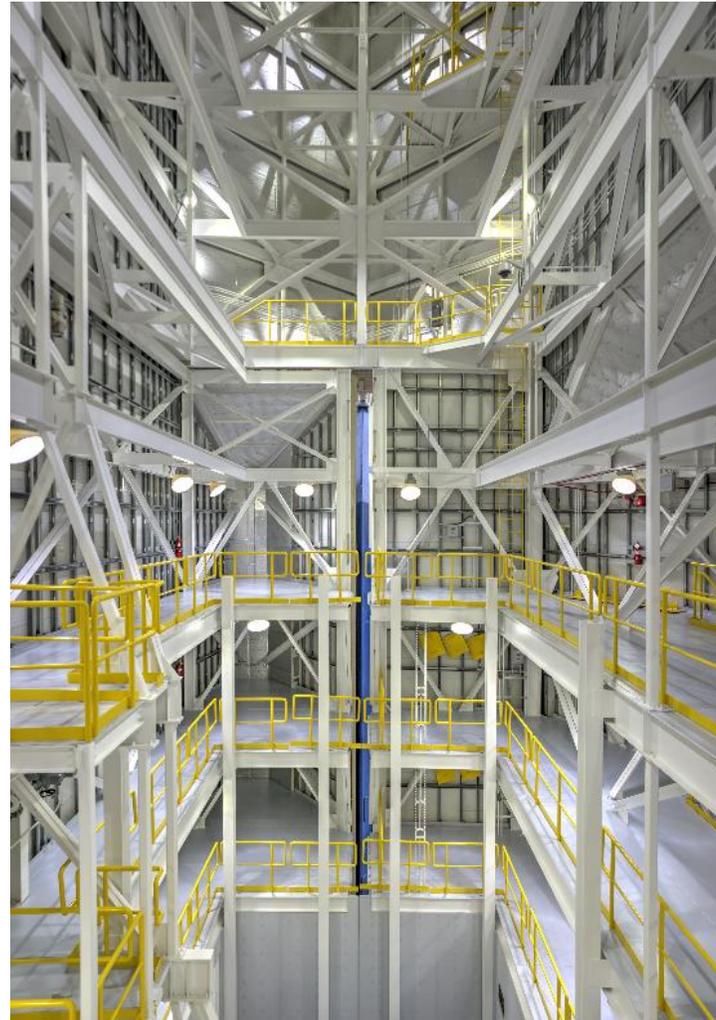


Final Result

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

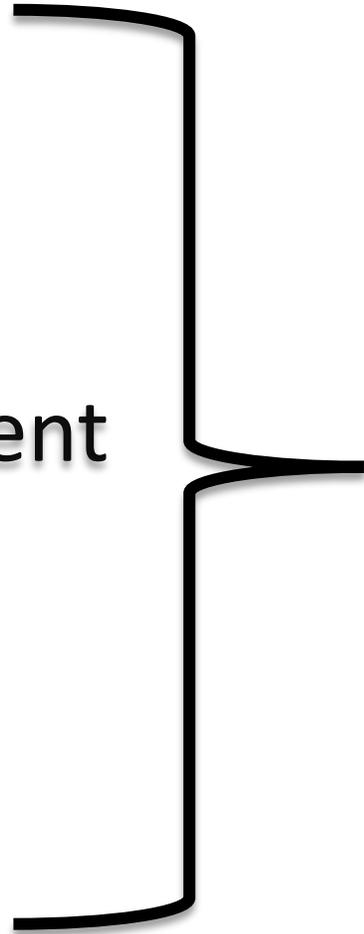


Update Jan 2017



Putting RFP Excellence Into Practice

- Fair
- Open
- Transparent
- Value
- Integrity



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Request for Proposal



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Want today's Presentation?

White papers?
Toolkits?
Templates?



center4procurement.org/mmcap/

Jake.Smithwick@uncc.edu

Free Webinar Series

3rd Thursdays every month

@ 12pm Central

15-min Teaching Moment

(learn a new tip, trick, or tool)

30-min Virtual Peer Group

(network with professionals)

Office Hours

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



Previous Recordings Available Online!

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



Best Practices for Evaluator Training

February 17, 2022



Got RFP Soft Skills?

March 17, 2022



IT Software Demonstrations

June 16, 2022



Amazing Pre-Proposal Meetings

July 21, 2022



Responding to Vendor RFIs

August 18, 2022



Human Dimensions of Procurement Professionals

September, 15 2022



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