

# Better Vendor Debriefings and Avoiding Protests

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# Agenda

- **Background & Foundations of Procurement Excellence**
- **Impacts of Poor Quality Debriefings**
- **Tips for High Quality Debriefings**

# Reality



# Reality of the Situation

- Performance **has been proven to NOT correlate** to contract types, delivery methods, software, design quality, etc.
- Performance **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

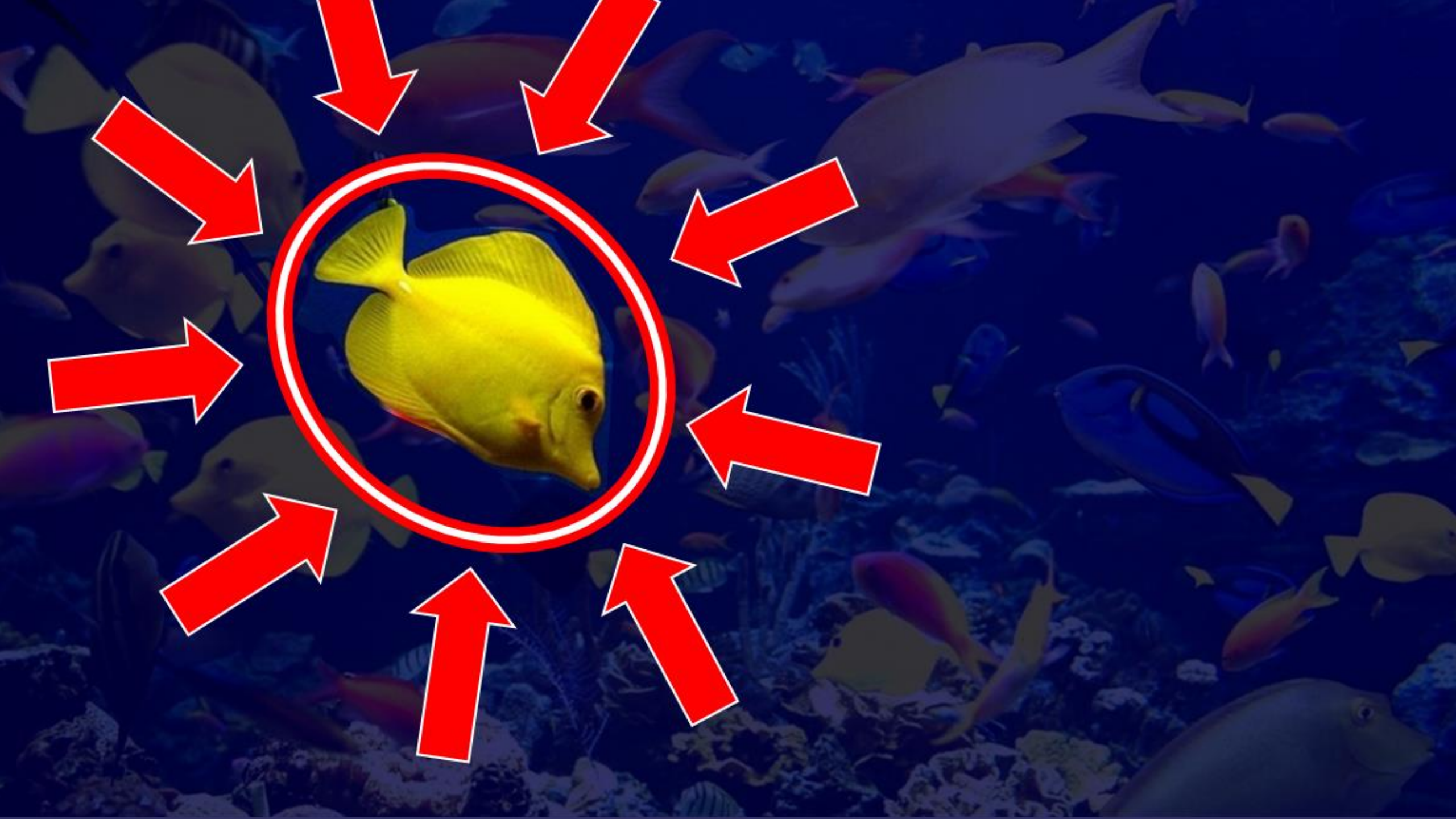
will not exceed the capability  
of the people doing the work

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











## ***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!**



# 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?
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- 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**



# 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)**

# Simple Things To Consider

# Attracting Suppliers

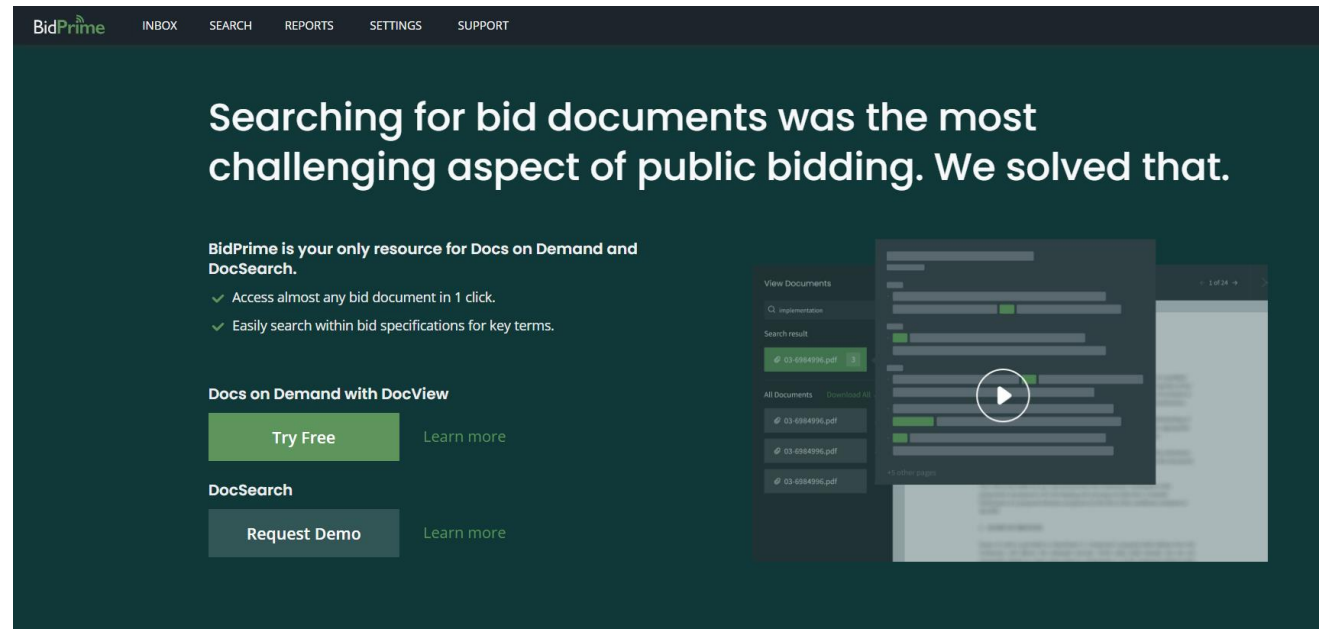
- Step 1 – Have a “good” name/title of the RFP



# National Solicitation Warehouse

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

BidPrime



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# Avoid Long or Vague Titles

- *Request for Proposals for the Alexander Goldwater Improvement Center Construction Documents Preparation*

# Avoid Long or Vague Titles

- ~~*Request for Proposals for the Alexander Goldwater Improvement Center*~~ **Construction Documents Preparation**

# Avoid Long or Vague Titles

- *City of Nashville Request for Proposals for Suppliers that can perform Needs Assessments*

# Avoid Long or Vague Titles

- ~~City of Nashville Request for Proposals for Suppliers that can perform~~ Needs Assessments for Food Services



# Attracting Suppliers


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

# Enterprise Resource Planning System

Fort Bend ISD, TX #RFP-21-077MC

















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Agency Contact Info 

**Reference #:** RFP-21-077MC **Alert:** Erp Consulting

**Documents:**  Appendix A-Vendor ...  Appendix A-Vendor ...  Appendix B-Support ...  Appendix D-Purchas...  Appendix E-Bonds R...  Appendix F-TRS Re...  Appendix H-CFO Fin...  Data Conversion Co...  
 Appendix G-FBISD ...  Data Protection Add...  RFP 21-077MC-Pre...  UPDATED 2020 ED...  Appendix F-TRS Re...  RFP 21-077MC- Bon...  RFP 21-077MC - SO...  RFP 21-077MC - Ad...  
 RFP 21-077MC - Ad...  RFP 21-077MC - Ad...  Proposal Exemption...  Appendix C- Sample...  Pre-Proposal Meetin...  Insurance Requirem...  FBISD - Agreement f...  General Provisions.p...  Form ACH.pdf  
 Form 1295.pdf  FBISD - Agreement f...  Data Protection Add...  Data Conversion Co...  Appendix G-FBISD ...  Appendix H-CFO Fin...  Appendix E-Bonds R...  Appendix D-Purchas...  Appendix B-Support ...  
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# Which File Contains The RFP?

## Project Management Information System SaaS and Implementation

Great Lakes Water Authority

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**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

# 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...](#)  
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[Download All](#)

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

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

# Attracting Suppliers

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

# Don't Make It Difficult To Read

**APPENDIX E – PROJECT DESCRIPTION**  
**AUDIT AND ACCOUNTABILITY FUND**  
Service Delivery and Modernization Review of Development Review

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

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

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

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

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

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

**Appendix A – Registration Form**

TO : Independent Electricity System Operator  
FROM : [Insert Name of Proponent]  
RE : Fairness Advisor Services

Password

! 'RFP-324 Fairness Advisor...' is protected. Please enter a Permissions Password.  
Enter Password:   
OK Cancel

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

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

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

# Attracting Suppliers

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

# Respond to 20 Items...

## Requested Information:

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

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



# Respond to 20 Items...

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

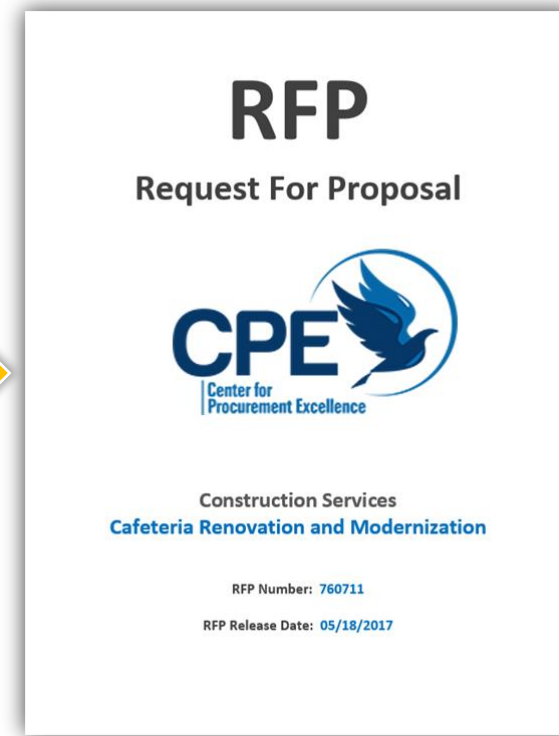
### Requested Information:

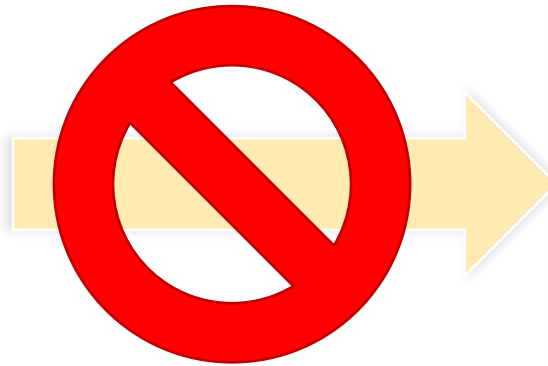
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| Proposed Timelines                                 | <a href="#">File Type: Any (.*)</a>            | Multiple | REQUIRED    |
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| NH Confidentiality Conflict of Interest            | <a href="#">File Type: Any (.*)</a>            | Multiple | REQUIRED    |

# Debriefing

- **Vendors or suppliers are informed about the reasons why they were not selected for award.**
- **This can include reasons for low scores or ratings, and areas of weaknesses or opportunities of improvement**
- **Debriefings can be done in person or in writing (via email).**







# When do we conduct Debriefings?



# CONTRACT AWARD

Pre-Award



# CONTRACT AWARD

Pre-Award



Post-Award



# Poor Quality Debriefings?

# Poor Quality Debriefing

- Assumptions about you as a client
- Poor reputation, and low future response rates
- Protest – vendor assumption that you did not follow your process
- Vendor will imagine the worst and assume you selected a favorite/preferred vendor

# Debriefing Scenario #1

# Consider The Following:

*Thank you for your proposal submission. We appreciate the time and effort that you put into the response. Your proposal was very comprehensive, but we selected another proposal that was a better fit for our needs. We really appreciate your submission and would encourage you to participate on our future efforts.*



# Consider The Following:

*Thank you for your proposal submission. We appreciate the time and effort that you put into the response. Your proposal was very comprehensive, but we selected another proposal that was a better fit for our needs. We really appreciate your submission and would encourage you to participate on our future efforts.*

# Consider The Following:

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# Consider The Following:

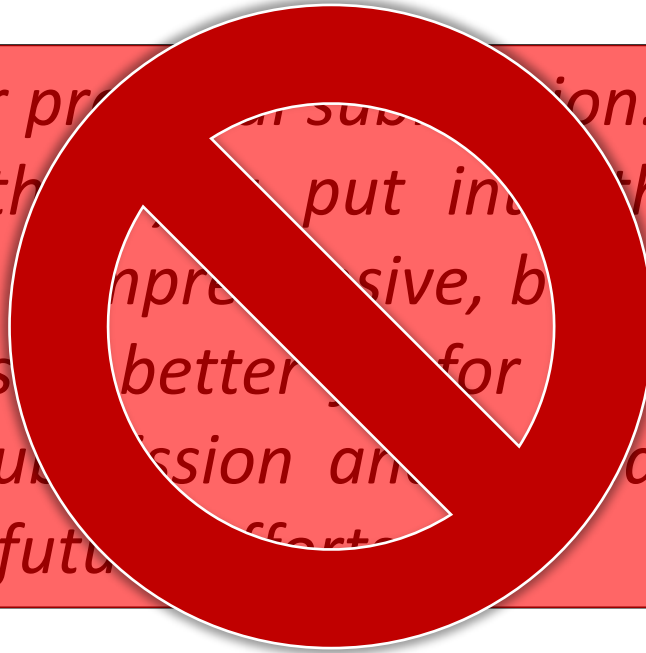
*Thank you for your proposal submission. We appreciate the time and effort that you put into the response. Your proposal was very comprehensive, but we selected another proposal that was a better fit for our needs. We really appreciate your submission and would encourage you to participate on our future efforts.*

# Consider The Following:

*Thank you for your proposal submission. We appreciate the time and effort that you put into the response. Your proposal was very comprehensive, but we selected another proposal that was a better fit for our needs. We really appreciate your submission and would encourage you to participate on our future efforts.*

# Consider The Following:

*Thank you for your proposal submission. We appreciate the time and effort that you put into the response. Your proposal was very impressive, but we selected another proposal that was better for our needs. We really appreciate your submission and encourage you to participate on our future efforts.*









LICENSED BY

**Nintendo**

THE  
#1  
ARCADE  
SMASH  
HIT!

MIDWAY

**Atari**



**SUPER NINTENDO**  
ENTERTAINMENT SYSTEM



MIDWAY.



# NBA JAM

PRESS START

TM

ACCELADIS.





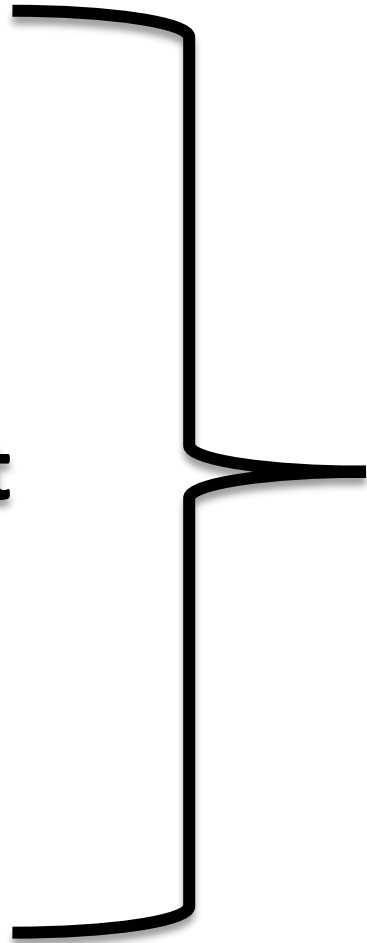





# Goal of a Solid Debriefing

# Putting RFP Excellence Into Practice

- Fair
- Open
- Transparent
- Value
- Integrity



**RFP**  
Request for Proposal

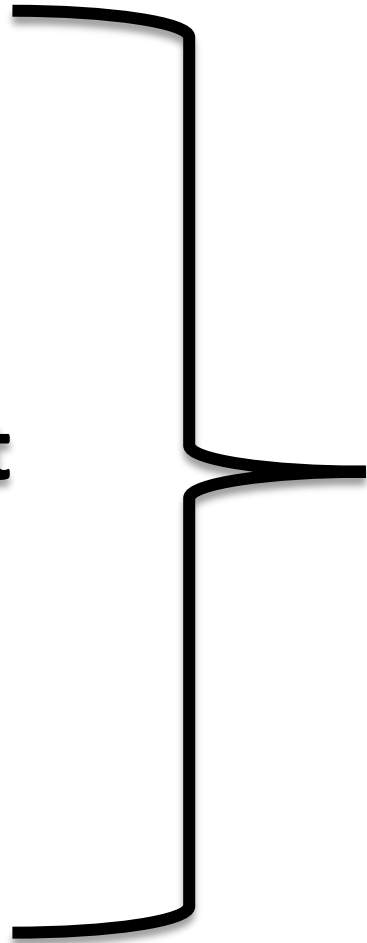
**CPE**   
Center for  
Procurement Excellence

Information Technology (IT)  
**Software Implementation Template**

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

# 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



**The purpose is not to just explain  
why they lost!**

**Provide them with enough comfort  
that they were treated fairly, so that  
they will want to propose on our  
next project**

# Integrity: Ensure Confidence and Trust

Offer Comprehensive Debriefings to all Vendors:



- Get better proposals next time
- Greater accountability
- Builds “good-will”

# **Integrity: Ensure Confidence and Trust**

**Vendors should commonly say:**

**“Wow, we’ve never received this level of feedback before!”**

**“We put a lot of time and resources into our proposals and this makes it worth it!”**

# Debriefing Scenario #1

*Thank you for your proposal submission. We appreciate the time and effort that you put into the response. Your proposal was very comprehensive, but we selected another proposal that was a better fit for our needs. We really appreciate your submission and would encourage you to participate on our future efforts.*



# Debriefing Scenario #2

# Debriefing Scenario 2

- Factor 1 (Cost): **2<sup>nd</sup> best**
- Factor 2 (Approach): **1<sup>st</sup> best**
- Factor 3 (Experience): **4<sup>th</sup> best**
- Factor 4 (References): **2<sup>nd</sup> best**
- Factor 5 (Qualifications): **4<sup>th</sup> best**
- Factor 6 (Interview): **4<sup>th</sup> best**

# Debriefing Scenario 2

*Thank you for your proposal submission. We appreciate the time and effort that you put into the response. Your proposal was very comprehensive, but we selected another proposal that was a better fit for our needs. We really appreciate your submission and would encourage you to participate on our future efforts.*

- **Factor 1 (Cost): 2<sup>nd</sup> best**
- **Factor 2 (Approach): 1<sup>st</sup> best**
- **Factor 3 (Experience): 4<sup>th</sup> best**
- **Factor 4 (References): 2<sup>nd</sup> best**
- **Factor 5 (Qualifications): 4<sup>th</sup> best**
- **Factor 6 (Interview): 4<sup>th</sup> best**

# Debriefing Scenario 3

- Factor 1 (Cost): **2<sup>nd</sup> best – (\$55,000)**
- Factor 2 (Approach): **1<sup>st</sup> best (8.4)**
- Factor 3 (Experience): **4<sup>th</sup> best (6.1)**
- Factor 4 (References): **2<sup>nd</sup> best (5.9)**
- Factor 5 (Qualifications): **4<sup>th</sup> best (5.4)**
- Factor 6 (Interview): **4<sup>th</sup> best (5.4)**



# Debriefing Scenario 3

- Factor 1 (Cost): **2<sup>nd</sup> best – (\$55,000)**
- Factor 2 (Approach): **1<sup>st</sup> best (8.4)**
- Factor 3 (Experience): **4<sup>th</sup> best (6.1)**
- Factor 4 (References): **2<sup>nd</sup> best (5.9)**
- Factor 5 (Qualifications): **4<sup>th</sup> best (5.4)**
- Factor 6 (Interview): **4<sup>th</sup> best (5.4)**

# Debriefing Scenario #2: Heating Up!



# Debriefing Scenario #2: Heating Up!



# Recommendation

**Provide the vendors with as much information as possible to help them understand why they lost**

# What is a Great Debriefing?

# Keys to a Great Debriefing

1. Summarize the evaluation process
2. Synthesize evaluator comments
3. State the vendor's relative evaluation scores

# What's that mean?

- **Summarize** evaluation process
  - How many proposals were received
  - How the proposal was evaluated (from RFP!)
    - the methodology... step 1, step 2, etc.
  - Shortlist determination
- **Synthesize** evaluator comments
  - What did they like / not like?
  - What could have been improved?
- **State** the evaluation scores
  - How did the vendor being debriefed compare to others?



# Debriefing Scenario #3



# Step 1: Summarize the evaluation process

## SELECTION PROCESS REVIEW

As outlined in the RFP, the purpose of the debriefing is to provide general feedback on the proposal, discussing strengths and weaknesses with the objective being to assist the firm in preparation of future proposals.

### ***Selection & Evaluation Process:***

1. The City received a total of **six (6)** compliant submissions for this RFP
  - The following proposal forms were reviewed by The City's Procurement Agent to ensure all formatting requirements were met and that no identifying information was present.
    - Project Methodology (Proposal Form 4)
    - Technical Approach (Proposal Forms 5)
    - Public Engagement Strategy (Proposal Form 6)
2. Proposal Evaluations
  - From each consultant, sections above were sent to the Evaluation Committee to be reviewed individually.
  - The Evaluation Committee members then submitted their evaluations back to The City's Procurement Agent. The compiled scores for each Proposal Form used to calculate evaluation points.
  - Each consultant's past performance information and narratives of related experience submissions were scored directly by The City's Procurement Agent based upon the number of surveys and the numerical values submitted within each survey.
  - Cost Proposals were entered into the Evaluation Matrix numerically by The City's Procurement Agent.
  - After reviewing the proposals, the Evaluation Committee was provided with the Past Performance Surveys and Narratives of Related Experience.
3. Short List Determination

~~After completing the above evaluations, the top three (3) ranked proposals were short listed and~~

# Step 2: Synthesize evaluator comments

|              |   |  |  |
|--------------|---|--|--|
| Consultant C | 5 |  | Identified obvious risks, not sure they are the top identifiers.   |
| Consultant D | 7 | Identified early equipment planning again noting some factors relating directly to fleet, give an indication that they are looking closer at this complex project.   |  |
| Consultant E | 5 | Recognition of resistant of change by staff. Good understanding of changing public perception of a "wasteland" concept. I believe they hit most of the commonsense points of construction variables on the uncontrollable section. | Not sure of where their data came from to confidently state that structures would be twice our size? Is this preconceived without truly diving in? |
| Consultant F | 3 | Access, budgeting, remediation, are all realistic issues   |  |

| Submittal    | Evaluation Score (1-5-10) | Pro/Strengths  | Con/Weakness   |
|--------------|---------------------------|--|--|
| Consultant A | 1                         |  | Timeline was vague and did not seem to account, or be fully tailored to, the project purpose.  |
| Consultant B | 5                         | Clear timeline & deliverables listed, specificity was good in understanding the approach envisioned. | More detailed descriptions would have strengthened the purpose to some steps that seemed added for marketing (Community engagement)                  |
| Consultant C | 10                        | Strong and clear timeline with supporting details  |  |
| Consultant D | 5                         | Graphic was helpful in understanding the text portion.   | Text was generalized and seemed generic in regards to this project.  |
| Consultant E | 10                        | Clear timeline, purpose connections, and deliverables  |  |
| Consultant F | 1                         |  | Graphic and text portions did not align together as drawn. No clear association to timelines and time dedicated to each part of the method/approach. |

| Submittal    | Evaluation Score (1-5-10) | Pro/Strengths  | Con/Weakness   |
|--------------|---------------------------|--|--|
| Consultant A | 1                         |  |  |
| Consultant B | 5                         | Clear timeline & deliverables listed, specificity was good in understanding the approach envisioned. |  |
| Consultant C | 10                        | Strong and clear timeline with supporting details  |  |
| Consultant D | 5                         | Graphic was helpful in understanding the text portion.   | Text was generalized and seemed generic in regards to this project.  |
| Consultant E | 10                        | Clear timeline, purpose connections, and deliverables  |  |
| Consultant F | 1                         |  | Graphic and text portions did not align together as drawn. No clear association to timelines and time dedicated to each part of the method/approach. |

| Submittal    | Evaluation Score (1-5-10) | Pro/Strengths  | Con/Weakness   |
|--------------|---------------------------|--|--|
| Consultant A | 1                         |  |  |
| Consultant B | 5                         | Clear timeline, purpose connections, and deliverables  |  |
| Consultant C | 10                        |  |  |
| Consultant D | 5                         | Graphic was helpful in understanding the text portion. | Text was generalized and seemed generic in regards to this project.  |
| Consultant E | 10                        | Clear timeline, purpose connections, and deliverables  |  |
| Consultant F | 1                         |  | Graphic and text portions did not align together as drawn. No clear association to timelines and time dedicated to each part of the method/approach. |

|              |   |  |  |
|--------------|---|--|--|
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| Consultant F | 3 | Access, budgeting, remediation, are all realistic issues   |  |

Feedback for Future  
RFP Submissions

# Step 2: Synthesize evaluator comments, cont'd

## FEEDBACK FOR FUTURE RFP SUBMISSIONS

### 1. Execution Methodology

- Strengths:
  - Detailed schedule and tasks provided.
  - Timeline diagram was well-presented.
  - Graphic was helpful in understanding the text portion.
  - Specifically addressed items requested in our scope and provided specific deliverables and project schedule
  - Consultant provided how's on all 8 items listed in our scope of work. Defined deliverables of their scope too.
- Areas for improvement:
  - Order of tasks based on scope instead of logical order – made it slightly more difficult to follow the flow and envision the sequencing.
  - The formatting made it hard to read.
  - Public mtg and CC not specifically mentioned
  - Detailed text was generalized and seemed generic in regards to this project.

### 2. Technical Approach

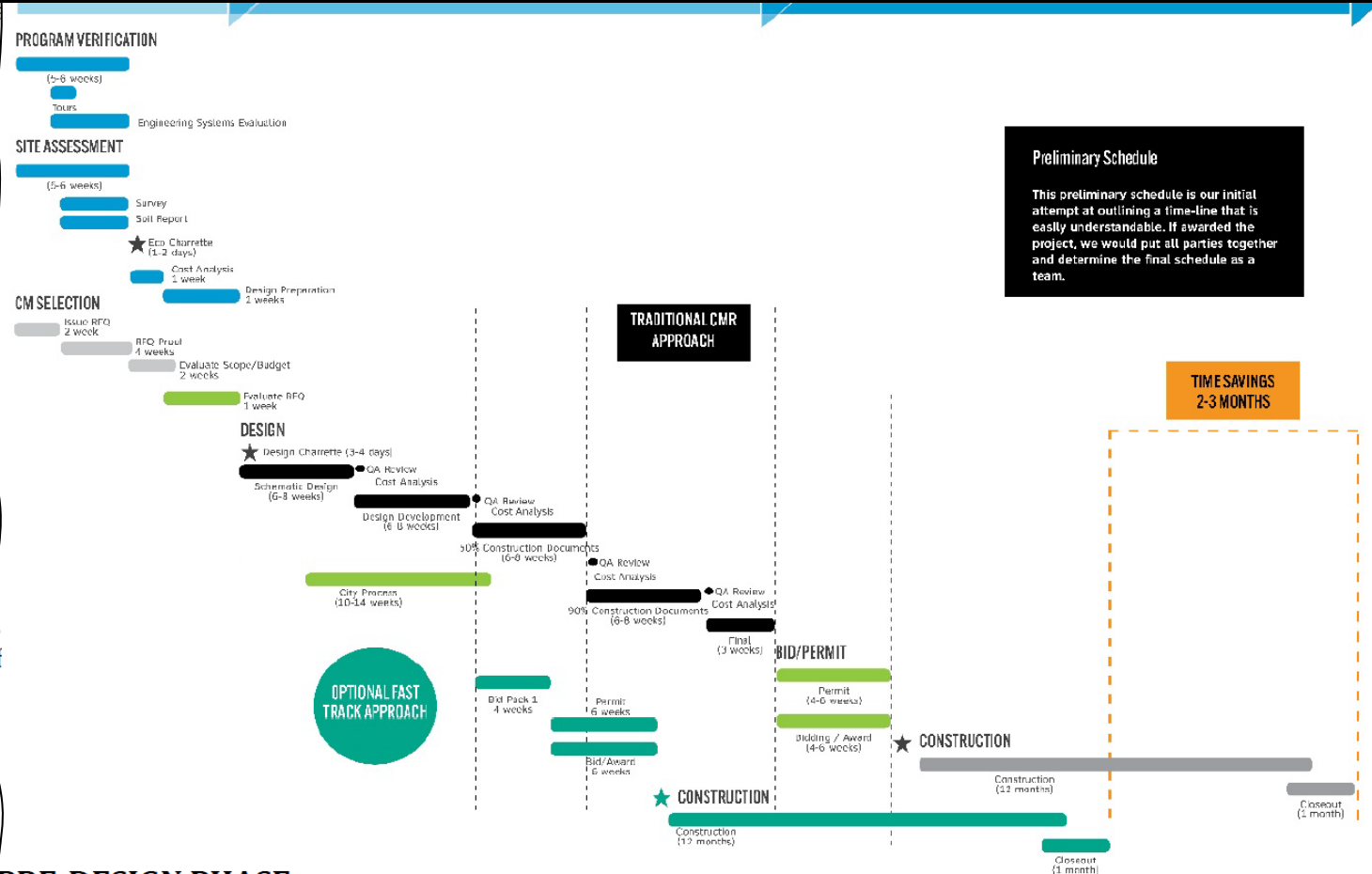
- Strengths:
  - Survey/questions staff
  - Sustainable design option note –change in growth could impact
  - Solutions in many items were vague and more related to marketing than addressing the issues of the site and overall project.

documents. Much has changed with the city and department since the program 2012—a new chief of police, senior leadership changes, and departmental growth. We will conduct a detailed review with each division to confirm and or modify the program document. We will also review the staffing projections and confirm the growth of the department. A police department does not grow by adding new divisions; it adds personnel in each division—an additional records clerk, a new detective, more patrol officers. The program must be programmed from the beginning to provide the department with the ability to grow in the future. Infrastructure and systems are also important to consider when planning. An undersized water line or electrical service can limit expansion opportunities or impact the future. Using the information gathered, we will update the program. We will also identify the top priorities provided in your outline and cross-reference them with the program to determine the square footage of this and subsequent phases.

We will use the updated program and phase priorities to develop a master plan for the new building. The master planning process is critical to the ultimate success of the program. Facilities are function-driven buildings. A significant amount of time will be spent with stakeholders to review “how” they do their jobs to develop the best building layout. The design team will meet with the different divisions in multi-day workshops to develop the program and phases and ‘test fit’ plans.

Understanding the workflow and relationship of the divisions is critical. The workflow of a patrol officer at the beginning and end of their shift will influence the location of the building and their personal car. Placing a duty bag locker near the patrol area and staff entrance can assist in this workflow. We have provided this feature in the master plan to have a positive impact on officer efficiency. Additionally, the location of the locker room, report-writing stations, patrol equipment area, and shift sergeant offices in the master plan can enhance or detract from the efficiency and operations of the staff. During the master planning process, we will discuss each division in this level of detail.

Wall o’ text...



### PRE-DESIGN PHASE

During the pre-design phase the design team will complete four primary, but very important tasks: 1) assist in Construction Manager Selection, 2) verification of Space Needs, 3) assessment of the Project Site and 4) analyze the Project Budget.

# Step 2: Synthesize evaluator comments, cont'd

## Execution Methodology

- Strengths:
  - Provided a great deal of detail in certain areas; however, the format was somewhat difficult to review.
  - Appeared to have experience with facilities.
  - Mentioned public engagement and concerns.
- Areas for improvement:
  - Did not provide a timeline for an approximate schedule and duration.
  - Proposal felt more like sales language of a general delivery instead of speaking to this particular project.
  - Execution methodology read more like a term paper than a proposal.
  - Lacked details on schedule.
  - Format was terrible, should have subsections or bulleted list.
  - Formatting was not ideal. Presentation is important.

# Step 3: State the vendor's relative evaluation scores

| NO | CRITERIA             | FIRM A     | FIRM B     | FIRM C     | FIRM D     | FIRM E     |
|----|----------------------|------------|------------|------------|------------|------------|
| 1  | Cost/Fee             | \$ 248,000 | \$ 249,250 | \$ 252,575 | \$ 257,000 | \$ 263,000 |
| 2  | Approach & Execution | 7.6        | 8.0        | 7.0        | 6.0        | 6.2        |
| 3  | Qualifications       | 7.6        | 7.1        | 7.9        | 7.9        | 6.4        |
| 4  | Innovation           | 7.5        | 6.1        | 6.0        | 5.8        | 5.1        |
| 5  | References           | 9.5        | 10.0       | 9.2        | 9.9        | 9.3        |
| 6  | Interviews           | 8.6        | 5.9        | 5.1        | 5.1        | 4.8        |

**OVERALL SCORE:**      **97**                      **94**                      **91**                      **87**                      **84**

---


| NO                    | CRITERIA             | FIRM A     | FIRM B     | FIRM C     | FIRM D     | FIRM E     |
|-----------------------|----------------------|------------|------------|------------|------------|------------|
| 1                     | Cost/Fee             | \$ 248,000 | \$ 249,250 | \$ 252,575 | \$ 257,000 | \$ 263,000 |
| 2                     | Approach & Execution | 7.6        | 8.0        | 7.0        | 6.0        | 6.2        |
| 3                     | Qualifications       | 7.6        | 7.1        | 7.9        | 7.9        | 6.4        |
| 4                     | Innovation           | 7.5        | 6.1        | 6.0        | 5.8        | 5.1        |
| 5                     | References           | 9.5        | 10.0       | 9.2        | 9.9        | 9.3        |
| 6                     | Interviews           | 8.6        | 5.9        | 5.1        | 5.1        | 4.8        |
| <b>OVERALL SCORE:</b> |                      | <b>97</b>  | <b>94</b>  | <b>91</b>  | <b>87</b>  | <b>84</b>  |

| NO             | CRITERIA             | FIRM A     | FIRM B     | FIRM C     | FIRM D     | FIRM E     |
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| 1              | Cost/Fee             | \$ 248,000 | \$ 249,250 | \$ 252,575 | \$ 257,000 | \$ 263,000 |
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| OVERALL SCORE: |                      | 97         |            | 91         | 87         | 84         |



| NO                    | CRITERIA             | FIRM A     | FIRM B     | FIRM C     | FIRM D     | FIRM E     |
|-----------------------|----------------------|------------|------------|------------|------------|------------|
| 1                     | Cost/Fee             | \$ 248,000 | \$ 249,250 | \$ 252,575 | \$ 257,000 | \$ 263,000 |
| 2                     | Approach & Execution | 7.6        | 8.0        | 7.0 ✓      | 6.0        | 6.2        |
| 3                     | Qualifications       | 7.6        | 7.1        | 7.9 ✓      | 7.9        | 6.4        |
| 4                     | Innovation           | 7.5        | 6.1        | 6.0        | 5.8        | 5.1        |
| 5                     | References           | 9.5        | 10.0       | 9.2 ✓      | 9.9        | 9.3        |
| 6                     | Interviews           | 8.6        | 5.9        | 5.1        | 5.1        | 4.8        |
| <b>OVERALL SCORE:</b> |                      | <b>97</b>  | <b>94</b>  | <b>91</b>  | <b>87</b>  | <b>84</b>  |

| NO                    | CRITERIA             | FIRM A     | FIRM B     | FIRM C   | FIRM D     | FIRM E    |
|-----------------------|----------------------|------------|------------|--|------------|-----------|
| 1                     | Cost/Fee             | \$ 248,000 | \$ 249,250 | \$ 250,575  | <b>+2%</b> |           |
| 2                     | Approach & Execution | 7.6        | 8.0        | 7.0  | 6.0        | 6.2       |
| 3                     | Qualifications       | 7.6        | 7.1        | 7.9  | 7.9        | 6.4       |
| 4                     | Innovation           | 7.5        | 6.1        | 6.0  | 5.8        | 5.1       |
| 5                     | References           | 9.5        | 10.0       | 9.2  | 9.9        | 9.3       |
| 6                     | Interviews           | 8.6        | 5.9        | 5.1  | 5.1        | 4.8       |
| <b>OVERALL SCORE:</b> |                      | <b>97</b>  | <b>94</b>  | <b>91</b>  | <b>87</b>  | <b>84</b> |

| NO             | CRITERIA             | FIRM A     | FIRM B     | FIRM C   | FIRM D | FIRM E |
|----------------|----------------------|------------|------------|--|--------|--------|
| 1              | Cost/Fee             | \$ 248,000 | \$ 249,250 | \$ 251,575  | +2%    |        |
| 2              | Approach & Execution | 7.6        | 8.0        | 7.0  | 6.0    | 6.2    |
| 3              | Qualifications       | 7.6        | 7.1        |             | 0%     |        |
| 4              | Innovation           | 7.5        | 6.1        | 6.0  | 5.8    | 5.1    |
| 5              | References           | 9.5        | 10.0       |            | -8%    |        |
| 6              | Interviews           | 8.6        | 5.9        | 5.1  | 5.1    | 4.8    |
| OVERALL SCORE: |                      | 97         | 94         | 91   | 87     | 84     |

| NO             | CRITERIA             | FIRM A     | FIRM B     | FIRM C     | FIRM D | FIRM E |
|----------------|----------------------|------------|------------|------------|--------|--------|
| 1              | Cost/Fee             | \$ 248,000 | \$ 249,250 | \$ 254,575 | +2%    |        |
| 2              | Approach & Execution | 7.6        | 8.0        | 7.0        | -13%   |        |
| 3              | Qualifications       | 7.6        | 7.1        | 7.6        | 0%     |        |
| 4              | Innovation           | 7.5        | 6.1        | 5.0        | -20%   |        |
| 5              | References           | 9.5        | 10.0       | 9.2        | -8%    |        |
| 6              | Interviews           | 8.6        | 5.9        | 3.5        | -41%   |        |
| OVERALL SCORE: |                      | 97         | 94         | 91         | 87     | 84     |

# Should Not Be Fearful If Procurement Was Performed Fairly

| NO             | CRITERIA             | FIRM A     | FIRM B     | FIRM C     | FIRM D | FIRM E |
|----------------|----------------------|------------|------------|------------|--------|--------|
| 1              | Cost/Fee             | \$ 248,000 | \$ 249,250 | \$ 254,575 | +2%    |        |
| 2              | Approach & Execution | 7.6        | 8.0        | 7.0        | -13%   |        |
| 3              | Qualifications       | 7.6        | 7.1        | 7.6        | 0%     |        |
| 4              | Innovation           | 7.5        | 6.1        | 5.0        | -20%   |        |
| 5              | References           | 9.5        | 10.0       | 9.2        | -8%    |        |
| 6              | Interviews           | 8.6        | 5.9        | 5.4        | -41%   |        |
| OVERALL SCORE: |                      | 97         | 94         | 91         | 87     | 84     |

# Example

## Detailed Review of the Consultant's Proposal:

A detailed view of Raw Evaluation scores is shown below.

| NO | CRITERIA                                | Evaluation Scale | Consultant XYZ |
|----|---|------------------|----------------|
| 1  | Project Methodology                     | 1 - 10           | 5.6            |
| 2  | Technical Approach                      | 1 - 10           | 3.0            |
| 3  | Public Engagement Strategy              | 1 - 10           | 1.8            |
| 4  | Interviews (for short-listed)           | 1 - 10           | NA             |
| 5  | Past Performance Surveys (Project Team) | 1 - 10           | 9.6            |
| 6  | Past Performance Surveys (Project Team) | Count            | 12             |
| 7  | Narratives of Related Experience        | 1 - 10           | 6.4            |

| Average Score of all Proposals | XYZ's Percentage from Average Score |
|--------------------------------|-------------------------------------|
| 5.2                            | 8%                                  |
| 5.0                            | -40%                                |
| 4.2                            | -57%                                |
| NA                             | NA                                  |
| 9.7                            | -1%                                 |
| 11                             | 9%                                  |
| 4.9                            | 31%                                 |

| Average Score of Short List | XYZ's Percentage from Average Score |
|-----------------------------|-------------------------------------|
| 6.7                         | -16%                                |
| 6.7                         | -55%                                |
| 5.5                         | -67%                                |
| 5.4                         | NA                                  |
| 9.7                         | -1%                                 |
| 11                          | 9%                                  |
| 5.4                         | 19%                                 |

## Detailed Review of the Consultant's Proposal:

A detailed view of Evaluation Points received in each weighted category is shown below.

| NO          | CRITERIA  | Points Possible | XYZ's Points | XYZ's Overall Rank |
|-------------|---|-----------------|--------------|--------------------|
| 1           | Execution Methodology                             | 15              | 11.0         | 4 <sup>th</sup>    |
| 2           | Risk Assessment - Controllable + Non-Controllable | 20              | 7.6          | 4 <sup>th</sup>    |
| 3           | Value Assessment                                  | 15              | 4.2          | 6 <sup>th</sup>    |
| 4           | Interviews (for short-listed)                     | 35              | 0            | NA                 |
| 5           | Past Performance Surveys (Project Team)           | 5               | 4.9          | 3 <sup>rd</sup>    |
| 7           | Narratives of Related Experience                  | 10              | 8.7          | 1 <sup>st</sup>    |
| Total Score |   | 100             | 36.4         | 4 <sup>th</sup>    |

| Average Points of all Proposals | XYZ's Distance from Average |
|---------------------------------|-----------------------------|
| 10.3                            | -7%                         |
| 12.6                            | -40%                        |
| 9.8                             | --57%                       |
| NA                              | NA                          |
| 4.7                             | 4%                          |
| 6.6                             | 32%                         |
| 44                              | -17%                        |

| Average Points for Short List | XYZ's Distance from Average |
|-------------------------------|-----------------------------|
| 13.2                          | -17%                        |
| 17                            | -55%                        |
| 12.8                          | -67%                        |
| 28.3                          | NA                          |
| 4.7                           | -4%                         |
| 7.2                           | 9%                          |
| 83.2                          | --56%                       |

# BONUS: Ask the vendors for their feedback!

- At the conclusion of the meeting, ask if the Vendor has any feedback about the evaluation process.

## Feedback from Consultant Team:

- We would recommend establishing opportunities for consultants to learn more about the project up front before responding. It is difficult to respond when the scope is open-ended. The city may consider proprietary interviews (i.e. 1 hour per consultant or whatever amount is reasonable)





# Other Keys

# Keys to Providing Actionable Feedback

**1) “Translate” the vendor proposals back them**

# 1) “Translate” the vendor proposals back them

What did their words mean  
to you as a client?

# Keys to Providing Actionable Feedback

- 1) **“Translate” the vendor proposals back them**
- 2) **Remind them about differentiation**

## **2) Remind them about differentiation**

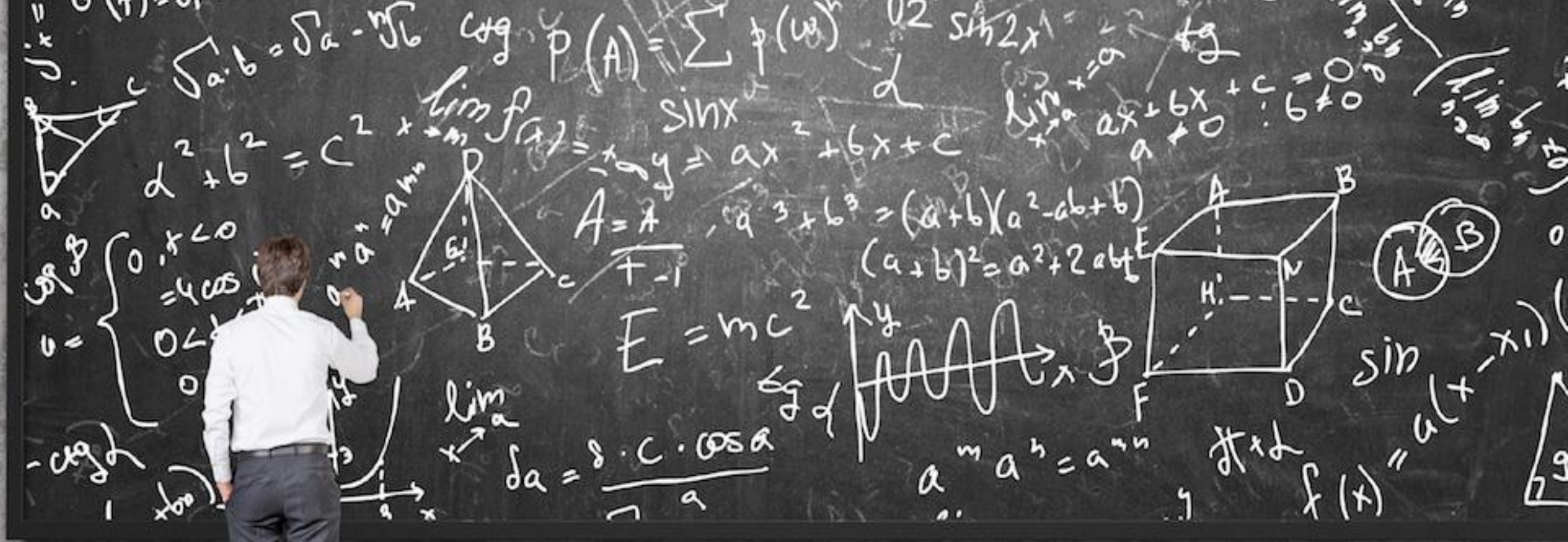
- Can their competitors say the same thing?**
- Does their proposal make them stand out?**
- Is it boilerplate? Standard? Copy/Paste?**

# Keys to Providing Actionable Feedback

- 1) **“Translate” the vendor proposals back them**
- 2) **Remind them about differentiation**
- 3) **Know thy audience: What are the benefits to the client?**

### **3) What are the benefits to the client?**

- **They should be adding value to the client!**
- **What are the outcomes? The results?**
- **Where is the proof? How can we believe it?**



# It IS Rocket Science!

# ^ NOT

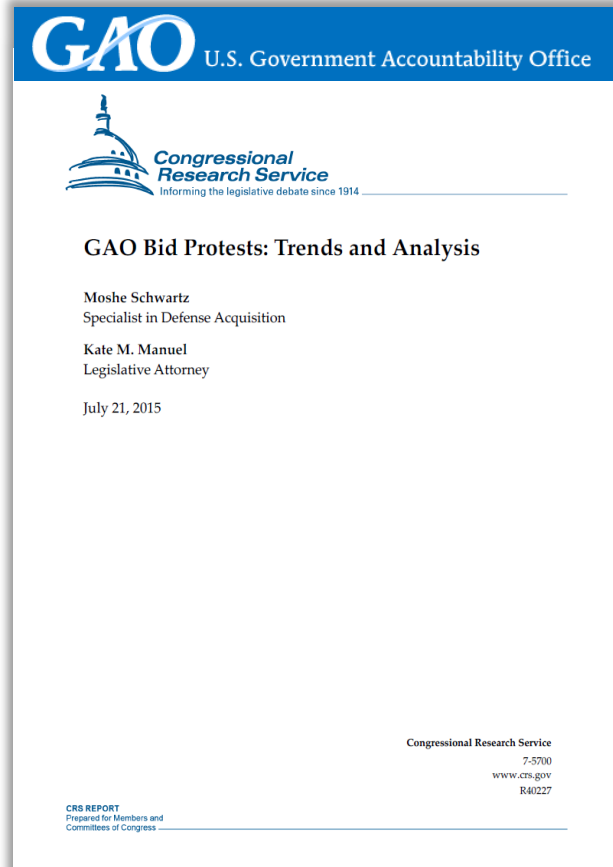




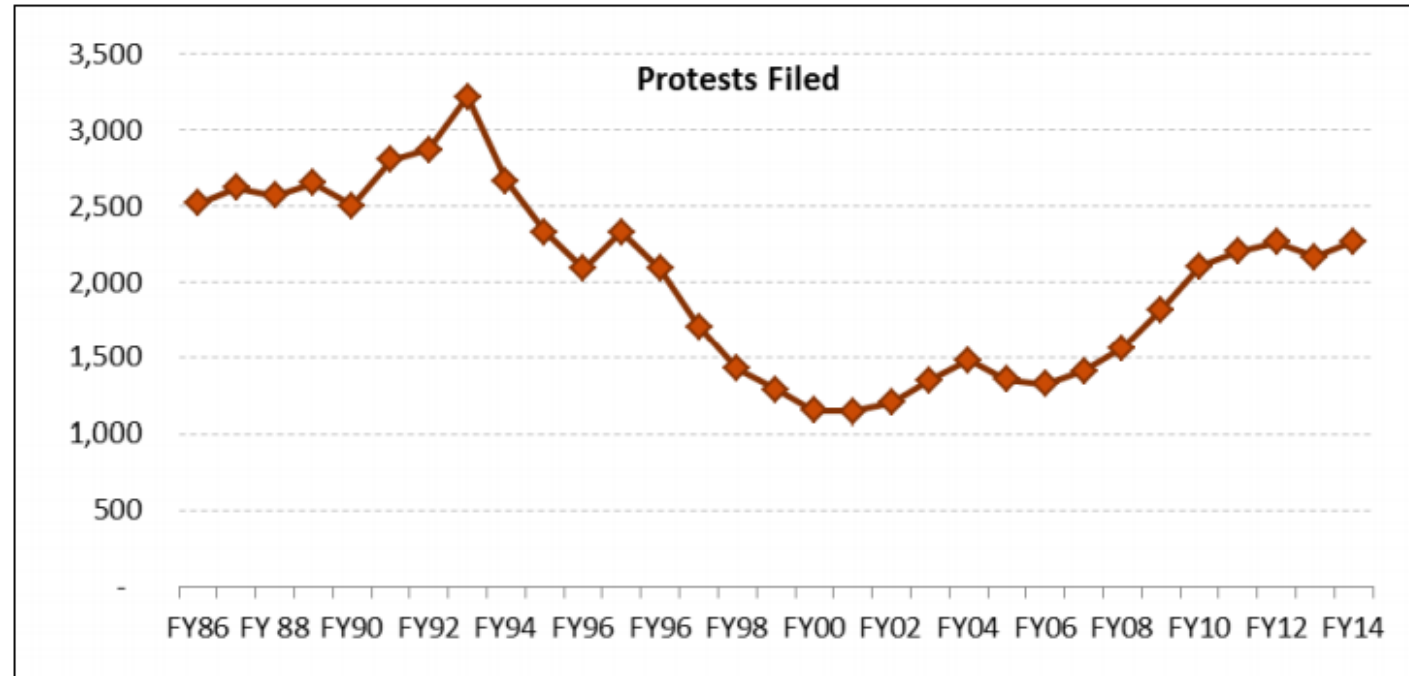


# Hesitancy with Offering Debriefings

# Protests



**Figure 8. Number of Bid Protest Cases Filed with GAO**  
FY1986-FY2014



**Source:** CRS analysis of Comptroller General annual reports to Congress for FY1986-FY2014. Data excludes protests from expanded jurisdiction.



# The Golden Rule

*Clearly state exactly how you are going to  
evaluate & score*



# The Golden Rule

*Clearly state exactly how you are going to  
evaluate & score*

*...And make sure you **follow** what you said  
you would do*



# 20-40% Of Protests Are Sustained



# 20-40% Of Protests Are Sustained

- 1. Unequal treatment of proposers**
- 2. Failure to follow evaluation criteria**
- 3. Unreasonable technical evaluations**
- 4. Unreasonable past performance evaluations**
- 5. Unreasonable cost/price evaluations**

# 20-40% Of Protests Are Sustained

1. Unequal treatment of proposers
2. Failure to follow evaluation criteria
3. Unreasonable technical evaluations
4. Unreasonable past performance evaluations
5. Unreasonable cost/price evaluations

## The Golden Rule

*Clearly state exactly how you are going to evaluate in the solicitation....  
...And make sure you **follow** what you said you would do*

# 20-40% Of Protests Are Sustained

1. Unequal treatment of proposers
2. Failure to follow evaluation criteria
3. Unreasonable technical evaluations
4. Unreasonable past performance evaluations
5. Unreasonable cost/price evaluations

## **Unreasonable:**

flawed approach to the  
evaluation

the scoring process  
was **flawed**

# Hesitancy: What Else Can Vendors Do?

# Public Disclosure & Public Information

## Freedom of Information Act (FOIA)

Federal law that allows the public the right to request access to records from any federal agency. Federal agencies are required to disclose any information requested under the FOIA (unless it specifically protected as confidential – such as personal privacy, national security, or law enforcement.)

## Public Records Act (States)

## Access to Information Act (Canada)

# Hesitancy: Debriefs Take Time!!!

- Yes, it is true. Debriefs can be time-intensive.
- What types of projects need debriefings the most?
- What can you automate?

# Summary



# Poor Quality Debriefing

# Poor Quality Debriefing

- **Assumptions about you as a client**

# Poor Quality Debriefing

- **Assumptions about you as a client**
- **Poor reputation, and low future response rates**

# Poor Reputation....



# Poor Reputation....



# Poor Quality Debriefing

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- **Protest – vendor assumption that you did not follow your process**

# Poor Quality Debriefing

- **Assumptions about you as a client**
- **Poor reputation, and low future response rates**
- **Protest – vendor assumption that you did not follow your process**
- **Vendor will imagine the worst and assume you selected a favorite/preferred vendor**



# Summary

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- **Try and help the vendors understand what they could do better and how they can improve their proposal quality**

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- **Try to be as transparent as possible**

# Summary

- **Try and help the vendors understand what they could do better and how they can improve their proposal quality**
- **Try to be as transparent as possible**
- **Most vendors will really appreciate that**

# **\*FREE\* Online Course!**



## **Better RFPs = Better Projects**

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

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- 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/)
- Open to all (even non-members of NASPO)
- Limited to first 100 participants.



# Free Webinar Series

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

*15-min Teaching Moment*

(learn a new tip, trick, or tool)

*30-min Virtual Peer Group*

(network with professionals)

*Office Hours*

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



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August 18, 2022



Human Dimensions  
of Procurement  
Professionals

September, 15 2022



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# We can help!

- CPE provides...
  - RFP templates
  - Legislative opinions
  - Advocacy
- Our team also provides:
  - Hands-on project support
  - Procurement strategy support
  - Procurement team training sessions (on-site or virtual)
  - Planning for challenging RFPs



**[Jake.Smithwick@uncc.edu](mailto:Jake.Smithwick@uncc.edu)**