

Navigating the Perilous Waters of Administration & Procurement Scheduling

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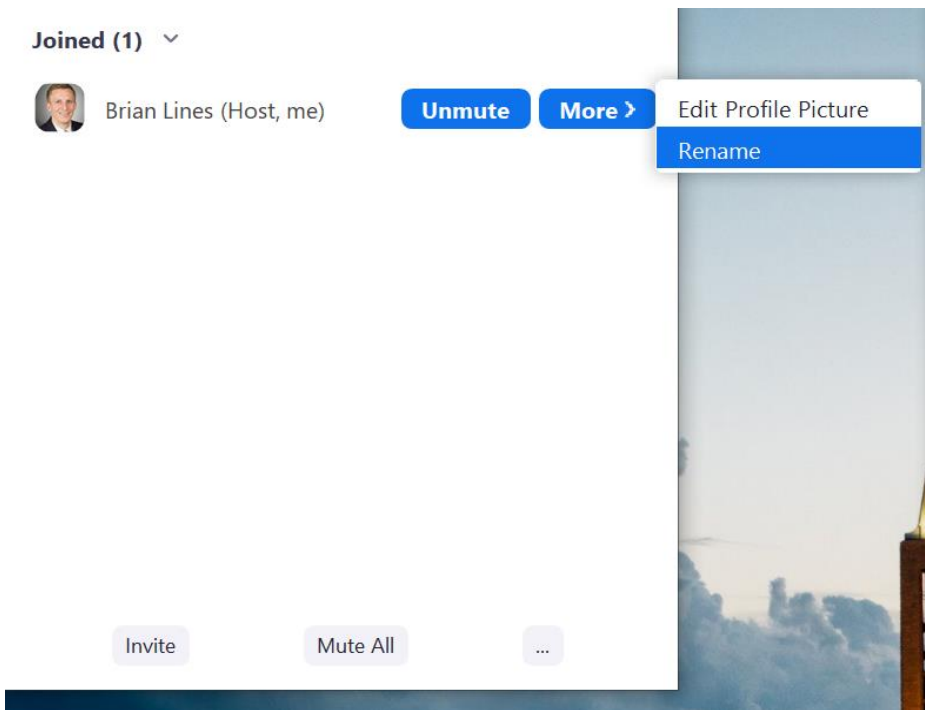
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Please update your Name!!!

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(Organization welcome too!)



Via Participants panel in Zoom
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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

Agenda

- **Creating an amazing Pre-Proposal Meeting**
- **Educating your evaluators (+ getting them to participate!)**
- **Recommendations for a great schedule**

Purpose of the Pre-Proposal Meeting

- Help **educate** and inform the vendors about the project
- Help vendors with understanding **how to submit** the best proposal
- It is a tool to **encourage participation** (keep them excited)

Typical Meeting Structure

1. Client provides high-level summary of SOW
(goals & objectives)
2. Procurement agent reviews procedural requirements
3. Suppliers ask questions

Do we even need a Meeting?

MAYBE

Small, simple, minimal
political impact project

Very clear SOW

YES

Complex

Lots of politics

Any IT project

Mandatory Meeting Attendance?

- If vendor does not attend & sign-in, they are disqualified
- WHY? To make sure they are present to hear critical information about the project



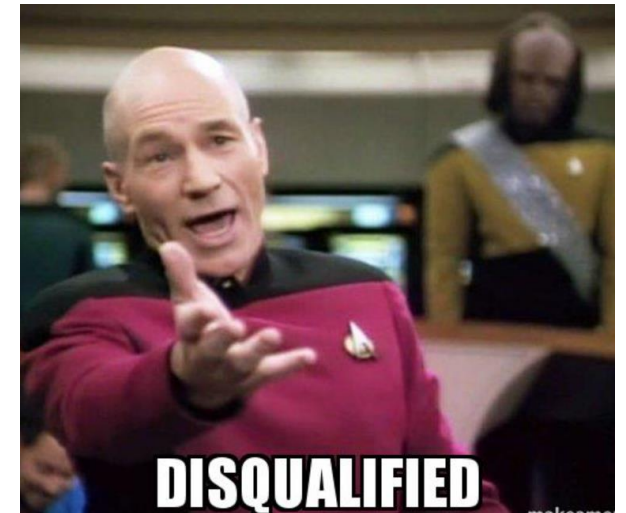
POLL: Should the meeting be mandatory??

YES, the meeting should be mandatory to attend

NOPE. People can attend if they want... or not.

Our take on mandatory...

- There shouldn't be anything unique or different that isn't already in the RFP.
 - If there is, that should be issued in an addenda.
- Less administrative burden
- What Happens If:
 - Supplier gets into a car accident on the way?
 - Someone gets sick?
 - Unforeseen circumstance (flight cancelled)?



Logistics: Room Requirements

- Enough seats for anticipated vendors (1-3 per vendor)
- Enough seats for internal attendees (client/end users/PM)
- Keys/access
- Projector, computer, and slide clicker
- Don't Need: Coffee/Food/Copy of the RFP

Logistics: Virtual Meetings

- Enough licenses (access) for anticipated vendors (3-5 per vendor)
- Enough access for internal attendees (client/end users/PM)
- Perform a test run (if never done before)
 - make sure the screen / slides are able to be shared!!!

Logistics: Sign-In Sheets

- **Sign-in sheets**
 - **Company Name**
 - **Representative Name**
 - **Phone**
 - **Email**
- **This is important to note who attended (if you have a mandatory meeting), but it also allows small or targeted businesses, or subs, to reach out to larger firms to partner with.**

[illegible]

Meeting Format: **Introductions**

- **Do not need to introduce everyone**
 - Buyer (Process)
 - Client Rep / PM (Scope)
- **Do not introduce evaluators**
- **Welcome & thank the vendors for their time**

Meeting Format: **Media**



Presentation Delivery

- Don't need to be the best / most outgoing public speaker
- However:
 - Do NOT read the slides
 - Do NOT squeeze too many things onto a single slide
 - Do NOT aim for having 100 slides
- This will result in what is called:
"Death-by-PowerPoint"



Presentation Contents



- **PART 1: REVIEW SCOPE OF WORK (Client)**
 - Should be kept high-level
 - Don't read everything (vendors have the solicitation to read)
 - Overall goals and objectives
 - Reiterate what is important to you
 - Reiterate the obstacles and challenges you are facing
 - Reiterate any unique conditions, risks, concerns, or challenges that you foresee or are worried about

Presentation Contents



- **PART 2: REVIEW PROCEDURES & SUBMITTAL FORMS (Buyer)**
 - Do not read every section!!!
 - Spend extra time on areas that vendors have had issues with in the past (e.g., filling out local business forms)
 - Review every Submittal Form
 - Take your time (allow vendor to digest and have opportunity to ask questions)
 - Goal is to teach...so provide example of bad/wrong responses versus proper responses

Q&A

- **Q&A is a tool to allow the vendors to learn (and clarify their thoughts).**
- **Suggest to allow vendors to ask questions at specific times throughout the presentation (rather than waiting until the end).**
- **If you have gone halfway through your presentation without questions, you either have issued a perfect RFP, or you may not be providing the vendors with an opportunity to digest and ask questions (talking too fast).**

Q&A

- **Resolve any immediate minor questions / issues in person.**
- **All ‘major’ questions that either deviate from the RFP or provide additional instructions not in the RFP must be followed up in writing (by the vendor). Also, if you can’t answer a question...it is okay to say “we will have to get back to you on that”. Don’t force yourself to answer a question if you are not 100% sure.**
- **Inform the vendors to submit all questions in writing so you can formally respond via an addenda (remind them that they need to submit in writing, otherwise must stick to original RFP)**

Meeting Format: **Conclusions**

- Remind vendors to submit all questions in writing
- Remind them to not communicate with anyone (besides buyer)
- Review schedule and critical upcoming dates
- Provide the slides and attendance list as an addenda
- Do not allow internal personnel to talk with vendors one-on-one

Site Walk

- Typically applicable to: construction projects & business services (janitorial, food, security, etc.) – where it is important to understand the physical space associated with the service/project.
- Client gives vendors a tour of the site/location of future work/services.
- Opportunity to ask questions during walk.



Site Walk Format

- **Walk the site**
- **Point out any critical/unique items**
- **Okay to answer questions, but remind vendors that any major questions should be submitted in writing to get a formal response**

Remember...

- **This shouldn't be treated as just another annoying step in the process.**
- **Use as an opportunity to help the vendors grow and become better. Show that you care.**
- **Vendors will greatly appreciate it (if you make it useful)**

Agenda

- **Creating an amazing Pre-Proposal Meeting**
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Overall Objective

Goals of the Evaluation Process

- **Identify the best team, proposal, and/or product**
- **NOT to solve all the project details nor answer all Q's**

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- **FIRST:** Quickly & Efficiently identify the best proposal
- **THEN:** Spend more time in the Contracting process

Evaluation Steps

Evaluation Steps

STEP 1

Evaluate
Proposals

STEP 2

Determine
Short-List

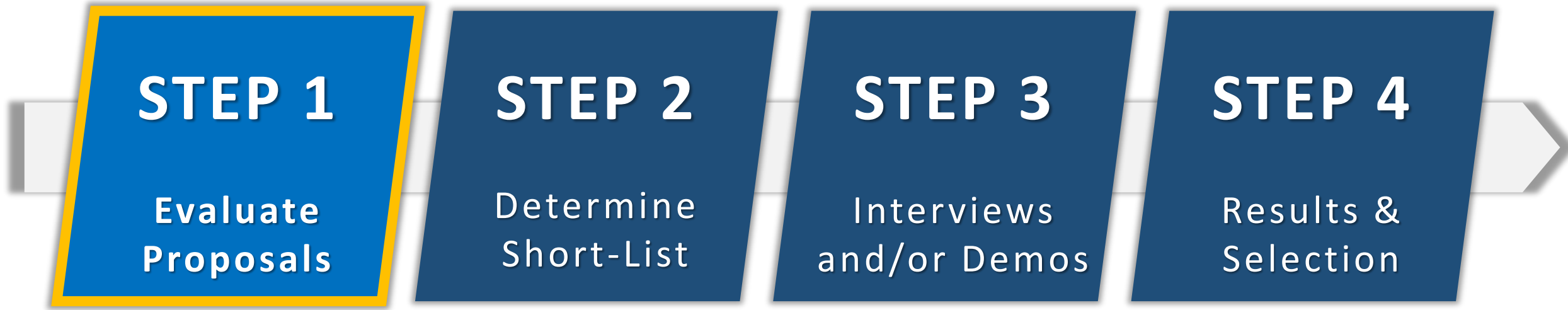
STEP 3

Interviews
and/or Demos

STEP 4

Results &
Selection

Evaluation Steps



- WHAT = Review of the Written Proposal Materials
- GOAL = Look for Clear & Justifiable Differences

Evaluation Steps



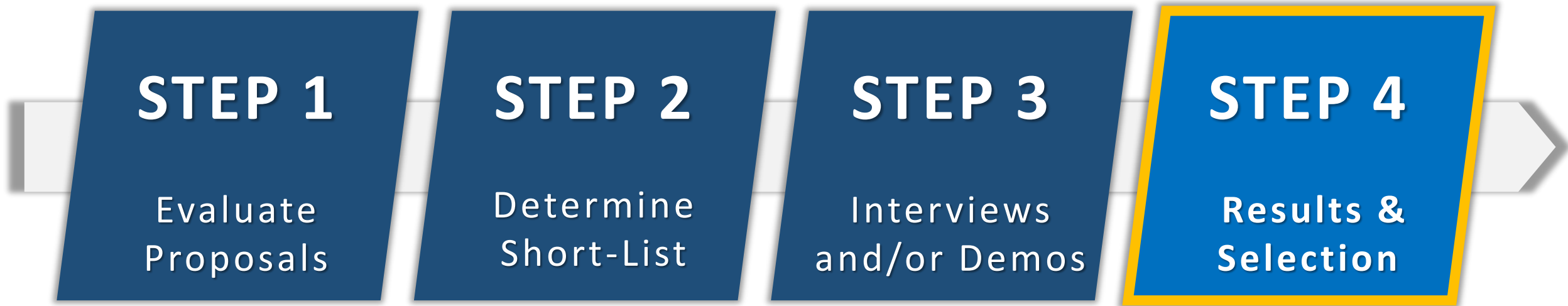
- WHAT = Narrow down the “field” or “pool”
- GOAL = Invite Competitive Proposals Forward

Evaluation Steps



- WHAT = Team Interviews & Product/Software Demos
- GOAL = Find the Best Team & Proven Product

Evaluation Steps



- WHAT = Compile Scores & Perform Cost Checks
- GOAL = Select the Best Proposal & Move into Contracting

Evaluation Ground Rules

Individual Evaluations



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

Raise the Flag!

- Let procurement know if you see a major risk or concern!



Cost/Financials will be treated Numerically



- Cost is held separately from qualifications-based evaluations
- Not revealed to Evaluation Committee until evaluation is complete (**to minimize bias**)
- Factored in before Shortlist at the pre-determined weight

Evaluation Scale

1-10 Evaluation Scale

10

Substantially Above & Beyond Requirements & Expectations

The document is “**excellent**” and there is **dominant information** to make a selection (**not much room for improvement**)
The evaluator **would not hesitate** to invite them to interviews/demos.

7

Clearly Meets (or possibly exceeds some) Requirements & Expectations

The document is “**above average**” but not excellent (**some room for improvement**).
The evaluator **would support** inviting them to interviews/demos.

5

Generally Meets Requirements & Expectations

The document is roughly “**average**” and “**acceptable**” but **does not significantly differentiate** itself from what is generally expected.
The evaluator would be **neutral or indifferent** about inviting them to interviews/demos.

3

Clearly Below (falls short of some) Requirements & Expectations

The document is “**below average**” and has **weaknesses** that makes it **unsatisfactory**
The evaluator **would not support** inviting them to interviews/demos.

1

Substantially Below the Requirements & Expectations

The document is “**poor**” and has **significant weaknesses** making it **unacceptable and completely deficient**.
The evaluator would not hesitate to eliminate them from consideration.

Purpose of the Evaluation Scale

- **Consistency across the Evaluation Committee**

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- **Role of evaluators = don't make a decision**
 - Proposals must differentiate themselves from the competition.
 - Proposals are responsible to show how they meet (or exceed) the requirements & expectations

Purpose of the Evaluation Scale

- **Consistency across the Evaluation Committee**
- **Role of evaluators = don't make a decision**
 - Proposals must differentiate themselves from the competition.
 - Proposals are responsible to show how they meet (or exceed) the requirements & expectations
- **Evaluators should look for clear & justifiable basis for their scores**

Tips for Scoring

Example: Dining Services



Example: What Score should we Give?



Proposal

#1

- Safeguarding the health and safety of our people and customers is our moral responsibility and essential to the success of our business.
- We have worked hard to establish a safety culture where our people instinctively take individual and collective responsibility for their own safety and that of those around them, and act accordingly

Proposal

#2

- From the food we serve, the places where we work, or our day-to-day operations, we make sure safety is an “every-moment-every-day” mindset for our employees.
- We work hard to create a safety culture where all employees can stop any situation in which they feel unsafe.

Proposal

#3

- Health and safety is a global strategic priority for our Firm. We are committed to a global health and safety culture and world class health and safety performance.
- We know that integrating health and safety into everything we do minimizes risk to people and property.

Example: What Score should we Give?



Proposal

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- Safeguarding the health and safety of our people and customers is our moral responsibility and the success of our business.
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Proposal

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- From the food we eat to the places where we work, or the way we do our operations, we make sure safety is an "every moment-every-day" mindset for our employees.
- We work hard to create a safe culture where all employees can stop any situation in which they feel unsafe.

Proposal

#3

- Health and safety is a global strategic priority for our Firm. We are committed to a global health and safety strategy and world class health and safety performance.
- We know that integrating health and safety into everything we do minimizes risk to people and property.

Looking for an Expert

Low Scores

- Boilerplate
- Generic or general
- Transfers risk back to the Client
- Sounds like everyone else
- Fluffy sales language
- Promises how great they are
- Confusing technical jargon
- Regurgitates the SOW

High Scores

- Project-specific
- Actionable
- Recommends solutions
- Differentiates from competition
- Clear, direct & to-the-point
- Explains how they be successful
- Easy for lay-person to understand
- Opportunities for innovation

Evaluation Forms

Evaluation Form

Proposal Form 3: Project Approach

Please evaluate the proposal based on the following scale:
(10 = Excellent | 7 = Above Average | 5 = Neutral | 3 = Below Average | 1 = Poor)

CODE	SCORE / RATING	STRENGTHS / PROS	WEAKNESSES / CONS
Firm A	<div><input type="checkbox"/> 10 <input type="checkbox"/> 7 <input type="checkbox"/> 5 <input type="checkbox"/> 3 <input type="checkbox"/> 1</div>	<div><div></div><div></div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div><div></div><div></div></div>
Firm B	<div><input type="checkbox"/> 10 <input type="checkbox"/> 7 <input type="checkbox"/> 5 <input type="checkbox"/> 3 <input type="checkbox"/> 1</div>	<div><div></div><div></div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div><div></div><div></div></div>
Firm C	<div><input type="checkbox"/> 10 <input type="checkbox"/> 7 <input type="checkbox"/> 5 <input type="checkbox"/> 3 <input type="checkbox"/> 1</div>	<div><div></div><div></div><div></div><div></div><div></div></div>	<div><div></div><div></div><div></div><div></div><div></div></div>

Insert 1-10 ratings

Evaluator Printed Name

Signature

Date

Evaluation Form

Proposal Form 3: Project Approach

Please evaluate the proposal based on the following scale:
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CODE	SCORE / RATING	STRENGTHS / PROS	WEAKNESSES / CONS
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Specific
Strengths & Weaknesses
to support rating

Evaluator Printed Name

Signature

Date

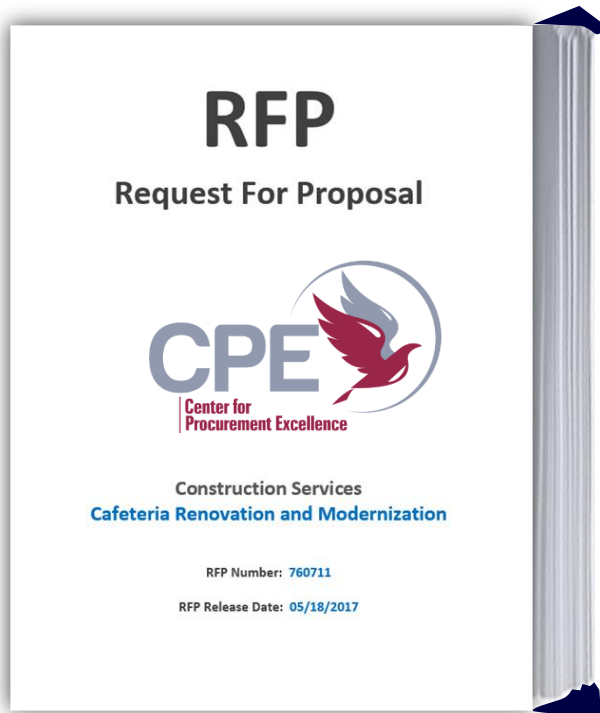
Be Sure to Give Justifying Comments

- Be as specific as possible!
- Refer to specific contents in the response
 - What was helpful? (a strength)
 - Or unhelpful (a weakness)
- Imagine the Vendor is sitting across the table from you in a debrief meeting.

Agenda

- **Creating an amazing Pre-Proposal Meeting**
- **Educating your evaluators (+ getting them to participate!)**
- **Recommendations for a great schedule**

Evaluation Milestones were Published



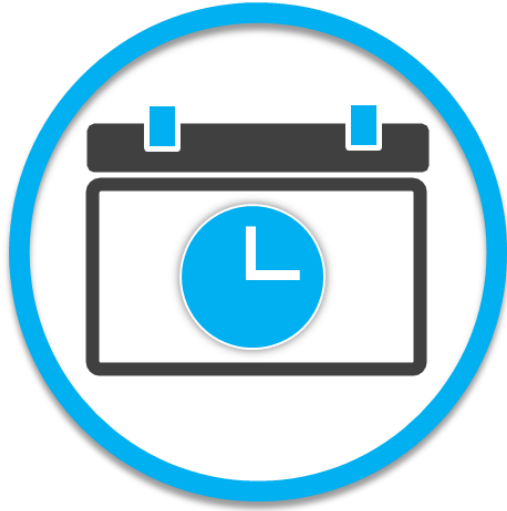
ANTICIPATED PROCUREMENT SCHEDULE

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

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



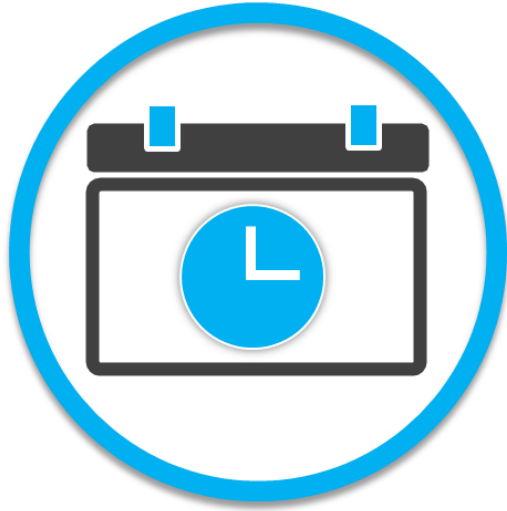
Procurement



Procurement



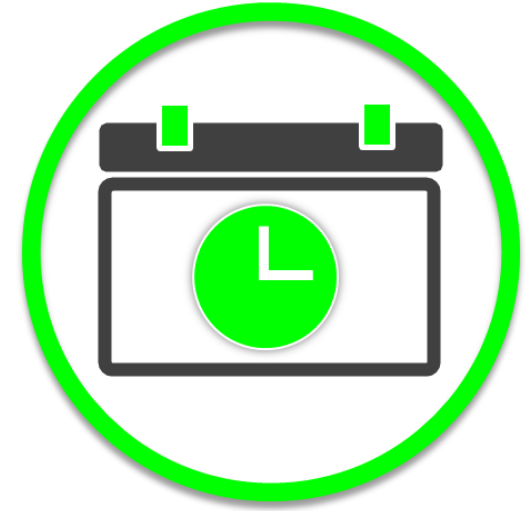
Project / Service



Procurement



Project / Service



Internal

Schedule Activities



Procurement Activities	
1	Advertise / Issue the RFP
2	Proposal Due Date

Schedule Activities



Procurement Activities	
1	Advertise / Issue the RFP
2	Proposal Due Date
3	Award Date

Advertisement Period



Procurement Activities

1

Advertise / Issue the RFP

- Pre-Proposal Meeting
- Site Walk
- Deadline to Submit Questions

2

Proposal Due Date

3

Award Date

Advertisement Period



Procurement Activities		
1	Advertise / Issue the RFP <ul style="list-style-type: none">• Pre-Proposal Meeting• Site Walk• Deadline to Submit Questions	4-6 Weeks
2	Proposal Due Date	
3	Award Date	

Double-Check Your Availability!

STEP 1

Evaluate
Proposals

STEP 2

Determine
Short-List

STEP 3

Interviews
and/or Demos

STEP 4

Results &
Selection





WINGS AIRLINE

Gate

19

Gate Closes

20:42

Class

First Class

Departure

New York JFK

REF No

00800597 524

CANCELLED

CANCELLED

WINGS AIRLINE

Gate

19

Gate Closes

20:42

Seat

27B

0187526644

FIRST CLASS

Evaluation Period



Procurement Activities	
1	Advertise / Issue the RFP
2	Proposal Due Date <ul style="list-style-type: none">• Proposals Evaluated• Shortlisting• Interviews & Discussions• Negotiations
3	Award Date

Evaluation Period



Procurement Activities	
1	Advertise / Issue the RFP
2	Proposal Due Date <ul style="list-style-type: none">• Proposals Evaluated• Shortlisting• Interviews & Discussions• Negotiations
3	Award Date

6-10
Weeks

Key Learning Points

- Use the pre-proposal meetings to entice your vendor partners
- Streamline the evaluation process
- Take time to make reasonable schedule



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