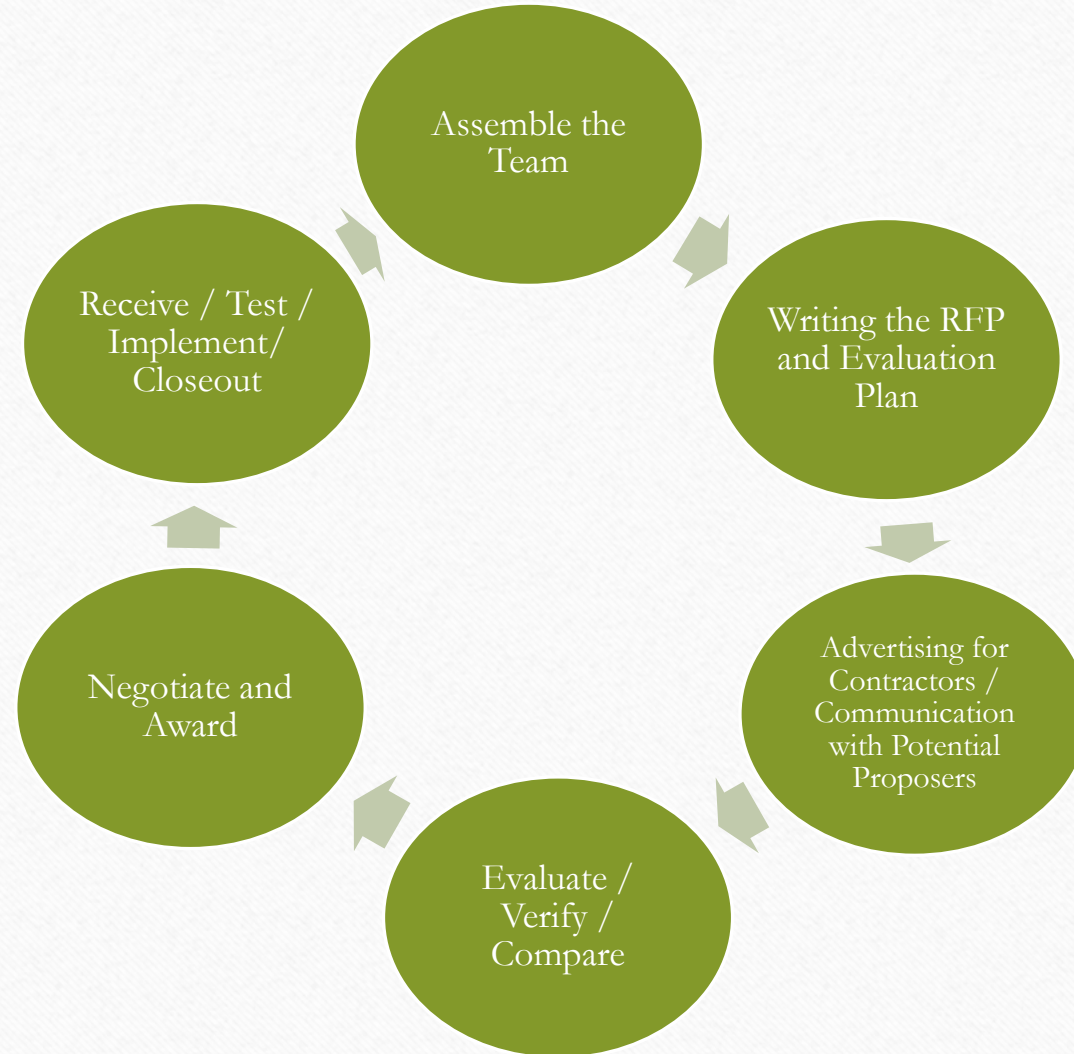


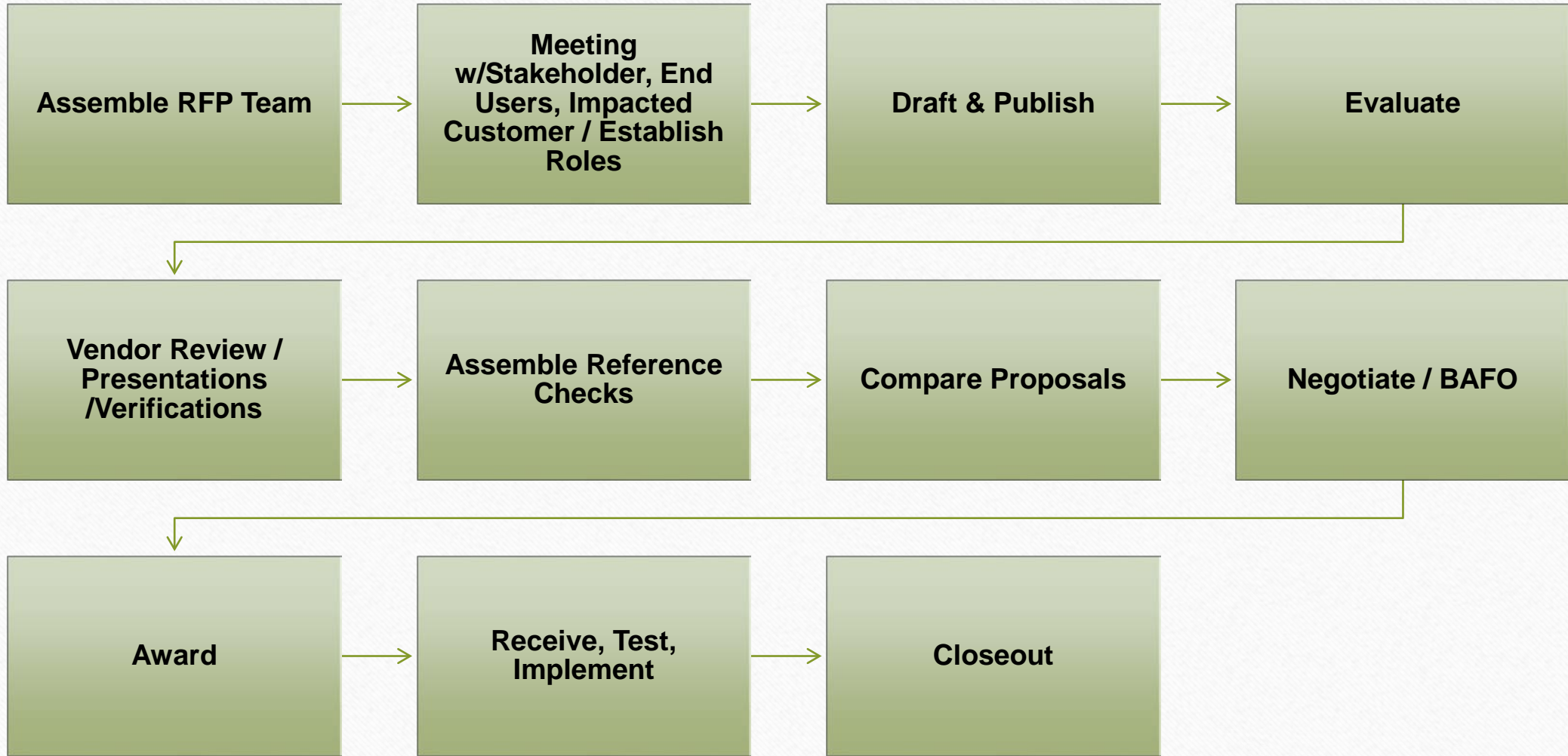
# FACILITATING THE RFP PROCESS PROCUREMENT'S ROLE



# Life Cycle of an RFP



# Steps for an RFP



# The Who's Who of Your RFP Team

- Who “Owns” the new service or product?
  - Who will be impacted by the new service or product?
  - Who are your SME's?
  - Who decides if it's a Go?
  - Who will ensure it's legal?
  - Who can bring it all together?
  - Who is a voting or non-voting member?
- 
- The group of individuals who work on any or all of these tasks are your “RFP Team”. Any person, firm, corporation or private provider who assists with these tasks cannot submit a proposal in response to the RFP.

# Who's Who ...continued.....

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- Who is responsible for the Specification Development?
- Who is responsible
- Is there a Technology Component?
  - Cloud based on On-Premise can still require their support
- Is there a Facilities Component?
  - Repairs, Alterations or Installations
- Is there a Financial Component?
  - Accepting Payments

# Establish Roles

- “Owner”
  - Typically the department paying / Primary User
  - Decision Maker
- Evaluation Team / Implementation Team
  - End Users
    - Could be those impacted or who use the product or service
    - Support Department (long-term or Short Term)
      - TS – Implementation or Post-Implementation Role
        - In there a technology component? No matter how small engage the department
      - Facilities – Implementation Role
      - Accounting
- Purchasing staff and non-voting technical experts - may answer technical questions regarding proposals, they should not give personal opinions or attempt to influence the outcome of the process.

# Develop Timelines / Other Parameters

- Is this a “NEW” Product or Solution
  - Yes: When is it Needed
  - No: When does the current one expire
    - Can you go “Month – to – Month”
    - Is there a pre-established “Exit Plan”
- Pre-Bid or Site Visit Requirements?
- Q & A
- How Long to “Leave Out On The Street” ;
  - beyond your statutory requirements
- Is a Written Contract Necessary?
- Current Status of Specifications

For many projects, it may take between 3 and 6 months just to get the award. The schedule can be impacted by competing priorities, the need for site visits and addressing concerns raised by evaluators and any legal issues. Considering these contracts generally average about 5 years, the investment upfront pays dividends.

# Develop Timelines / Other Parameters

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- Evaluation Team
  - Schedules Up to Date?
  - Can they be fully engaged?
    - How many other processes are they working on, in addition to their own workload?
  - What if they become unavailable for part of the process?
    - Do you delay Q & A, Demonstrations / Verification Presentations?



# Draft

Area of Consideration

Introduction / Background

Objectives

Current Environment

Scope: Define the Boundaries of the Acquisition

Pass/Fail Requirements

Detailed Requirement: Performance/Functional or Technical/Design

If it's Technical/Design – how do you validate?

Service Levels / Warranty Period

Contract Period

Contract Administration and Review

How will price adjustments be handled over the life of the contract?

Exit Strategy

# Often Forgotten.....

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- Careful thought should be given to the duration of the contract. Is there a possibility the contract may need to be extended due to delays in the award of a new contract
- Is there a possibility the value of the contract will either increase or decrease (eg new users come online which results in a greater than anticipated spend or future growth or reductions in need)
- Will the contract prices need to be adjusted in line with a price index such as the Consumer Price Index (CPI)? The applicable index should be detailed in the Specification.
- How, during the lifetime of the contract, can innovation and continuous improvement be encouraged to identify better ways of accomplishing the requirements of the contract. The contract could include a requirement that during the contract year there will be a meeting(s) between the contractor and the department to identify new features, performance issues or any cost savings that may be gained across the remainder of the contract period.

# Often Forgotten.....

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- Have all the departments impacted by this contract been identified and contacted?
- Are you accepting any form of payment: Finance/Accounting Department
- Are you making needing any changes to the facility: Facilities Maintenance Division?
- Are you adding new technology, upgrading current or need TS Department Support?
- If you're rebidding, have you addressed items from the current contract that need to be changed/added?
- Are there any special requirements for the location?
  - E.g. Background checks, phasing, or working in conjunction with another project.

# .....& Publish

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- How Long
  - Site Visits
  - Pre-Bids
  - Q & A
  - Level of Complexity
  - Do you expect “Partnerships” will be necessary

# Evaluate

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- Verify Responsiveness
- Review scoring and comments from evaluators
  - Do the comments support the scores given
  - Do the comments support the criteria evaluated
  - Are there consistent comments and scores across all evaluators

# Evaluate

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- In the evaluation meeting encourage discussion and facilitate conversations based upon review
- Allow the opportunity to update scores and comments
- Present the apparent shortlisted vendors to the committee
- Facilitate the discussion of next steps once the shortlist is confirmed
  - Presentation/Demo – What to cover? How long?

# Vendor Review/Presentations/Verification

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- Demos/Presentations not just a 'check in the box'
  - Verifies functionality
  - Provides clarity to questions and proposal
  - Can show innovative solution options available

# Reference Checks

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- Committee collectively will develop questionnaire
- All references should have the same questions, with the exception of follow-up
- Results should be documented in writing



# Compare Proposals

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- Which proposal provides the best value?
  - Best solution to meet the needs of the owner
  - Best price for the solution
  - Acceptable to terms and conditions

# Negotiate/BAFO

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- To BAFO or not to BAFO? Never a question.
- BAFO not just for price, consider services, terms, milestone payments, etc.

# Award

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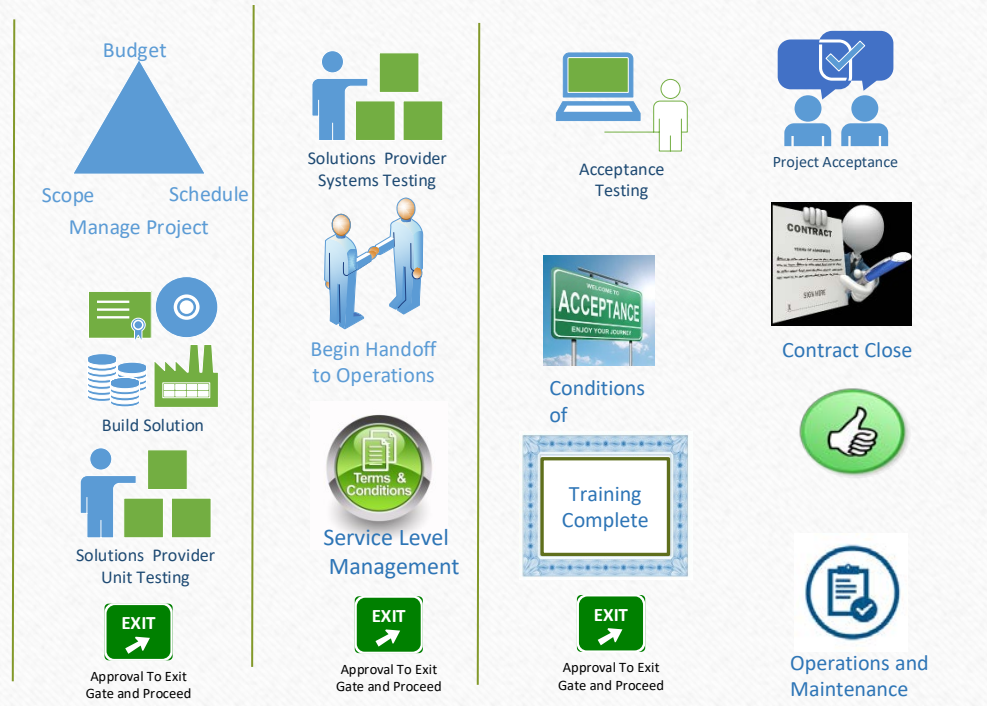
- Pre-Award meeting with selected vendor
  - Review specs/BAFO of contract
  - Discuss timelines for award and next steps
  - Ensure contact info is exchanged
- Contract Execution

# Receive, Test and Implement.....Oh My!!

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- ✓ Project Scope Management
- ✓ Project Schedule Management, Re-Planning
- ✓ Project Budget Management
- ✓ Project Risk Management
- ✓ Project Human Resources Management
- ✓ Project Communications Planning and Management
- ✓ Project Quality Management
- ✓ Project Test Planning and Management
- ✓ Project Review and Recovery

# PMO Processes (Example)



Questions

Thank you!



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