

RFP

Request for Proposal?

or

Routinely Fairly Pathetic?

Texas Parking Association

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CHANCE
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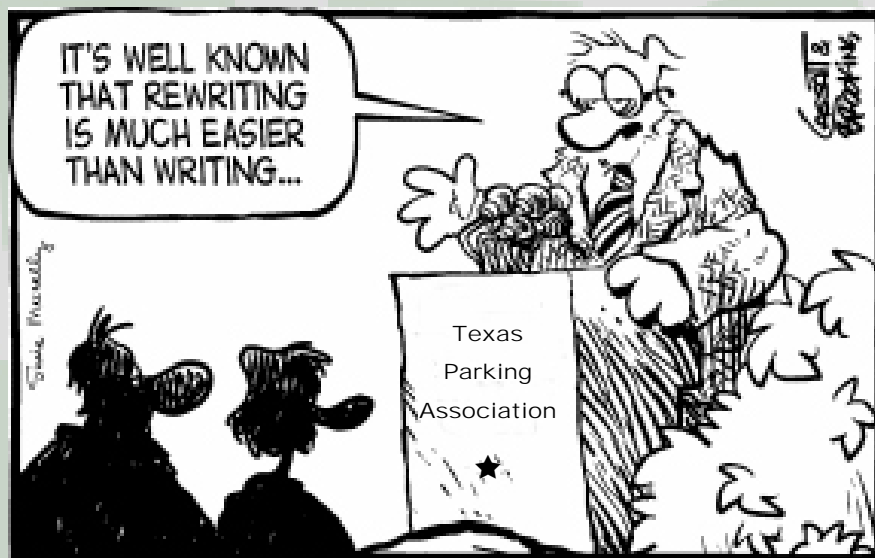
CMA offers consulting services in parking, transportation, and access management to cities, universities, medical centers, and special event venues across the United States.

We focus on:

- planning,
- management,
- operations, and
- finance.



We also write RFPs for our clients



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Topics for Today

- Overview of Procurement Methods
Private, public, RFQ/I-Negotiate, RFP, Bid
- Pre-RFP Activities
What should you do to get ready to prepare an RFP?
- The RFP Document
What should be in your RFP?
- **Some DO NOTs!**
- Post-Proposal Activities
How do you evaluate proposals, select your vendor/consultant/contractor, notify those who proposed, and monitor how you did?

Overview of Procurement Methods

■ Private or Sole Source

- ◆ Typically does not have to be competitive
- ◆ Desired consultant may be contacted directly to prepare scope and submit budget
- ◆ Both scope and price can be negotiated
- ◆ Contract may be of whatever style is desired by the owner

Overview of Procurement Methods (cont)

■ Public

- ◆ Typically governed by statute, institutional guidelines or requirements, or long-term practice
- ◆ Typically requires a competitive process
- ◆ Typically has a prescribed contract and set of conditions

Overview of Procurement Methods (cont)

- RFQs (Request for Qualifications) or RFIs (Request for Information)
 - ◆ May be issued prior to an RFP to narrow the list of prospective proposers
 - ◆ May be used to select a consulting firm, and then scope and price are negotiated
 - ◆ May be used to “beat the bushes” to see who might be interested in the project

Overview of Procurement Methods (cont)

- RFPs (Request for Proposals)
 - ◆ Often used for the competitive process
 - ◆ May include proposed scope and budget in one document, but may ask to have them submitted separately so that selection is made on the scope and qualifications prior to viewing budget
 - ◆ Evaluates more than price – experience, best overall value, references, showing clear understanding of issues

Overview of Procurement Methods (cont)

■ Bid

- ◆ Generally used for products, but sometimes used to purchase brainpower
- ◆ Price is the primary consideration, if all other requirements have been met adequately
- ◆ Does not evaluate quality as much as price

Pre-RFP Activities

- Get **your** act together !
 - ◆ What kind of assistance are you purchasing?
 - ◆ Prepare a draft of what you think you want.
 - ◆ Find out about your organization's purchasing requirements.

- ◆ Who are the stakeholders you must include in the process? Your boss? Your staff? A procurement officer? Other members of your organization?
- ◆ Share the draft with stakeholders and begin to obtain the thoughts of others.
- ◆ What is your realistic schedule?

Remember . . .



- Time is money
 - ◆ for you if you do not manage your process efficiently
 - ◆ for your prospective consultants if they have to struggle with your process

Pre-RFP Activities (cont.)

■ Get information !!

- ◆ Talk fairly with consultants and get their printed material or info from web sites

- Learn the terminology

- Learn what various firms specialize in

- ◆ Talk with your colleagues

- Who is in a similar situation to yours?

- Who recently got consulting assistance for the same issues?

- What can they tell you about their process, the consultants, and potential costs?

Pre-RFP Activities (cont.)

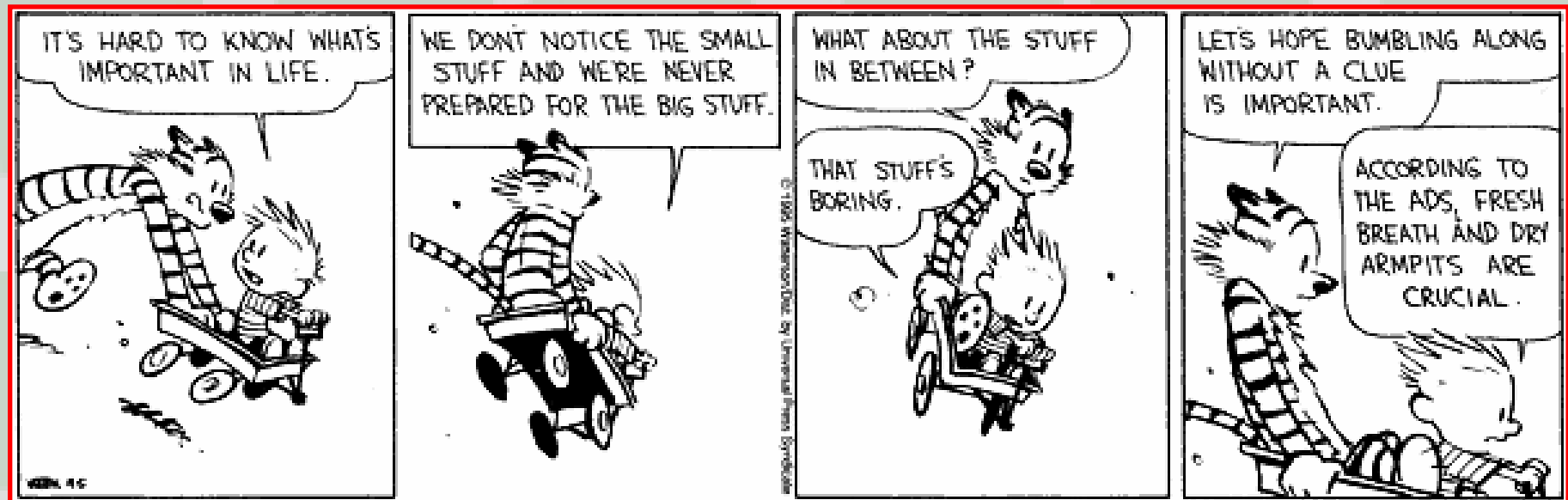
- Determine what your staff can do.
 - ◆ Help prepare sections of the RFP?
 - ◆ Assemble needed information on your existing conditions?
 - ◆ Research potential consultants?
 - ◆ Collect new data that might be needed?
 - ◆ Prepare information for an evaluation committee?

Pre-RFP Activities (cont.)

■ Refine your game plan . . .

- ◆ Can you do what you want in the time available?
- ◆ Should you do an RFQ/RFI first?
- ◆ Do you need professional help?
- ◆ Are there sufficient consultants who can provide the services you need?
- ◆ Do you have support for your project?
- ◆ Do you have a budget for your project?
- ◆ Who is going to do what? Roles and responsibilities

The Small Stuff is Important!



Timing is Everything . . .

- When is a good time to issue the RFP?
 - ◆ Not before a major holiday
 - ◆ Not just before you go on vacation and will not be available
 - ◆ Not when your organization's own schedule does not allow sufficient time to complete the project

■ When is a good time to have the RFPs due?

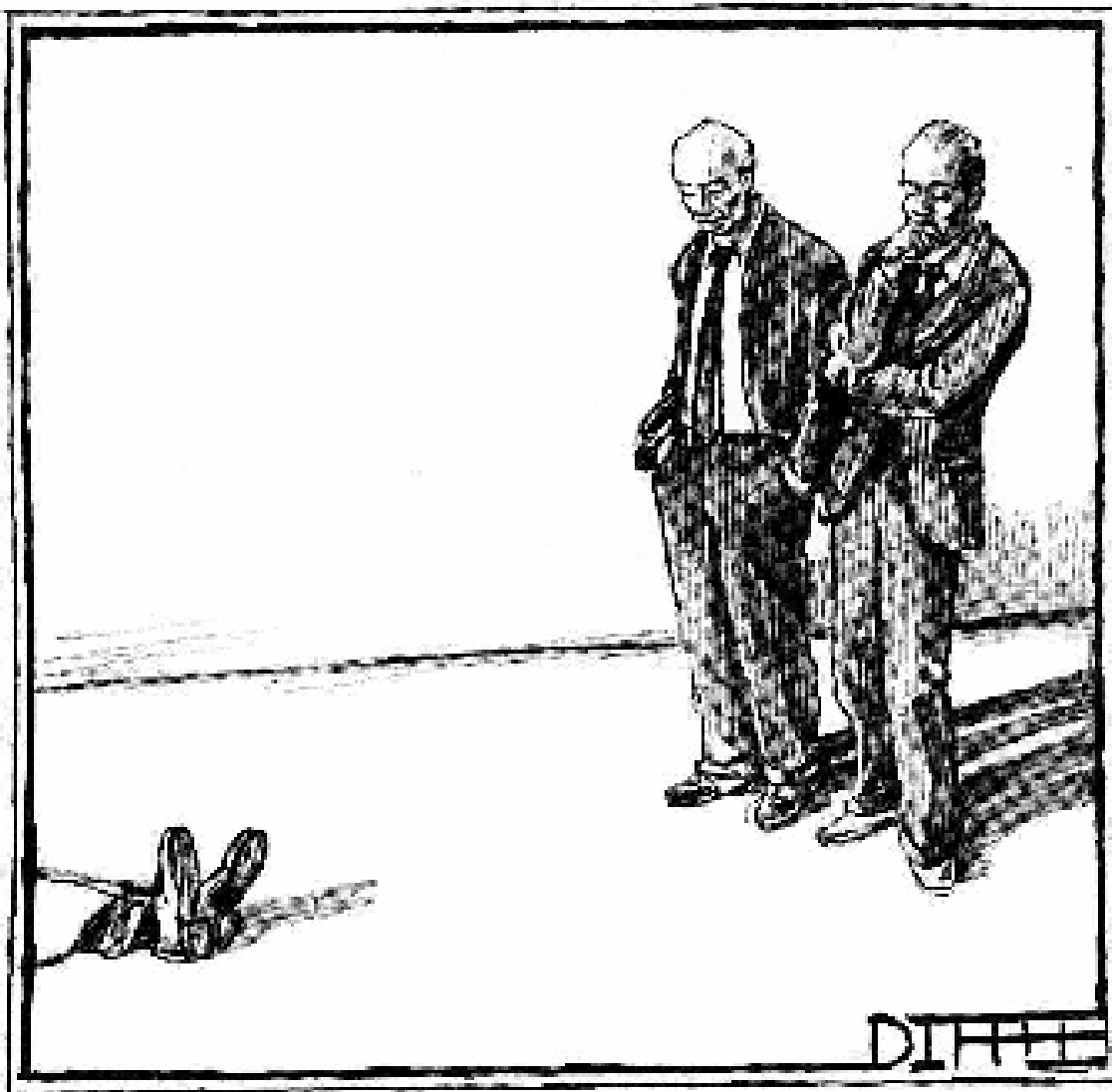
- ◆ Not just before or just after a major holiday
- ◆ Not at an awkward time period – e.g., 8:00 a.m. on a Monday (have to FedEx either on Friday or Saturday)

The RFP Document

- Introduction
- Critical Dates
- Background and General Description of the Project
- Scope of Services
 - ◆ Description of what you want done and how you want it done
 - ◆ Description of what you want done – contractor tells you how they will do it

The RFP Document (cont.)

- Requirements for Procedures and Content of Proposals
- Evaluation of Responses
- Form of Agreement between Owner and Consultant
- Required Forms
- Attachments (Information)



Consultants are not the enemy – they provide you with something you need in a manner you cannot do yourself!

"From the violent nature of the multiple stab wounds, I'd say the victim was probably a consultant."

Effects of a Bad RFP

- Companies may decide NOT to respond
- Your efforts result in confusion, not in clarity of what you want
- There will be many questions at a pre-proposal conference, or many “exceptions” offered in the proposal
- You won't look like you know what you are doing
- It will be difficult to evaluate responses
- **YOU WON'T GET WHAT YOU WANT!!**

Some DO NOTs! (Real World Examples)

- DO NOT call a mandatory pre-bid meeting if you have no new information to share or if seeing a location is not critical to the project.
- DO NOT issue 5 addenda to the RFP in one week – figure out what you want to do *BEFORE* you issue the RFP document.

Some DO NOTs!

- DO NOT have more than one date in the RFP on which the proposal is due.
- If you have a web-based proposal site for service providers to use, and it contains a count-down clock for the due date and time, DO NOT have the clock showing a time that is not valid in any US time zone!

Some DO NOTs!

- DO NOT ask for staff qualifications (or any qualifications) multiple times in the same set of requirements.
- If you are running a public process, DO NOT ask for confidential financial information. All you need to know is some evidence that the firm will be in business long enough to complete your project.

Some DO NOTs!

- DO NOT let your organization's procurement people write the **content** of your RFP. (In the middle of a parking master plan, there was the requirement to inspect bridges. The procurement guy thought it would be good to include . . .)
- DO NOT ask to have all pages numbered consecutively

Some DO NOTs!

- DO NOT forget to ask for a Scope of Services (or Scope of Work) and to specify where in the proposal you want it located
- DO NOT send out any RFP that has not been read in total by at least three people who know what you want to do

If You Have Really
Messed Up Your
RFP Process . . .

SAY NOTHING,
and try to look like you know what you're doing.



Post-Proposal Activities

■ Evaluation of Proposals

- ◆ The process must be developed in conjunction with the RFP – **NOT AFTER!!**
- ◆ Discuss and prepare for any potential legal issues
- ◆ Decide who is going to evaluate, and make sure they understand the project
- ◆ Document the evaluation process, who did it, forms used to do it, results
- ◆ Allow time for clarification of proposals, and treat all proposals fairly

Post-Proposal Activities (cont.)

- Selection of the successful proposal
 - ◆ Evaluation process should result in a priority list and a clear “winner”
 - ◆ Control and retain your selection documents
 - ◆ Follow your procurement process in terms of notifying the successful proposer



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Post-Proposal Activities (cont.)

- Notification of those who proposed
 - ◆ Determine how you will notify and when
 - ◆ Notify everyone that proposed – it is a common courtesy
 - ◆ Prepare notes and offer to conduct post-notification de-briefings with those who were not selected
 - ◆ Remember that the folks you did not select you may need for another project in the future!

Post-Proposal Activities (cont.)

■ “Lessons Learned”

- ◆ What went well that you will want to do again in another procurement?
- ◆ What went badly that you plan NEVER to do again?
- ◆ Write down the process so that it can be used successfully in the future
- ◆ Hold a staff-debriefing on the process

Fundamental Points

- The better your PREPARATION, the better your RFP will be . . .
- The better your RFP DOCUMENT, the more likely you are to receive proposals that meet your needs . . .

■ The better your entire RFP PROCESS:

- ◆ the more successful your project will be,
- ◆ the wiser you will spend your money,
and
- ◆ the more credible you will be in your
position – inside and out of your
organization!



**Questions
and
Answers !**