

RFQ / RFP  
Best Practices Workshop

Instructor Guide  
For  
PowerPoint Presentation

Developed by the  
AGC of America  
Team Selection Guidelines Task Force

**AGC of America**  
THE ASSOCIATED GENERAL CONTRACTORS OF AMERICA  

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Quality People. Quality Projects.



## A. Overview

The RFQ / RFP Best Practices Workshop is intended to train individuals charged with selecting design and construction teams how to do so in a fair and transparent manner. It is extremely important that the team selection process be completed with the highest possible degree of objectivity.

The Workshop was developed for delivery via PowerPoint presentation. The PowerPoint presentation is generic in nature, and may be presented in its original form, or may be customized to address the selection of parties for a specific role (e.g., architect, construction manager, engineer, etc.). In its original form, presentation of the Workshop will typically take one to two hours, depending upon the level of participant interaction. It can be presented in-person, or via webinar. The PowerPoint presentation can also be followed by a panel discussion wherein the attendees and a panel of industry professionals can discuss the best practices presented in the workshop.

This Workshop is provided free of charge by the Associated General Contractors of America (AGC) for presentation by industry organizations. It is understandable that for in-person presentations, organizations may wish to charge a registration fee to cover costs associated with hosting the Workshop. However, presentation of this Workshop in-person for a fee which materially exceeds the presenting organization's actual presentation cost, or presentation of the Workshop on a regional or national platform with substantial registration fees to participants, are both strongly discouraged.

## B. Preparation

The instructor for this Workshop should be a professional in the field of design, construction, or facility management, with a solid working knowledge of the RFQ/RFP process, and an absolute commitment to the following Team Selection Principles:

1. All RFQ/RFP information must be provided to all respondents, including responses to all questions
2. Selection criteria must be clearly identified and communicated to the respondents
3. Weighting of selection criteria must be identified and communicated to all respondents
4. Selection criteria and weighting must be strictly followed by the Selection Committee
5. Results of the selection matrix must be provided to all respondents (respondent names may be concealed)
6. Transparency and fairness must be maintained throughout the process

Preview the entire PowerPoint presentation. Be sure you know and understand the key ideas presented and are prepared to lead group discussions. It is the intent of the AGC of America Team Selection Guidelines Task Force to maintain the quality of this Workshop at a very high level. To that end, AGC would welcome constructive feedback from both Workshop instructors and participants. The Task Force has developed a Workshop Participant Survey, which is attached to this Instructor Guide. It is our hope that instructors will distribute this survey to the participants upon completion of the Workshop. Copies of the survey should be prepared by the instructor in advance of the Workshop. AGC requests that the instructor collect the surveys, summarize the survey responses, and forward a summary of these responses in Microsoft Word format to Michael Stark, AGC of America's Senior Director, Building Division, at [curriculum@agc.org](mailto:curriculum@agc.org).

### C. Welcome and Introduction to the Course

1. If the Workshop is being sponsored by an organization and a representative from the sponsoring organization is available, have that representative welcome participants to the course and introduce the instructor. If no sponsor representative is available, the instructor should introduce himself/herself and welcome participants to the course.
2. Explain or review Workshop guidelines and policies and other "housekeeping" items, e.g., the instructor's availability for questions, parking, refreshments, restroom locations, etc. This information may be presented by the instructor or by the sponsor representative.

### D. Suggestions Regarding Specific Slides

When to Use RFQ's and RFP's (Slide5):

The instructor should be aware of the different applications of RFQ's and RFP's (see page 7: *Possible RFQ / RFP Applications for Construction*). These typically include selections using Qualifications Based Selections, Best Value: Fees, and Best Value: Total Cost. Most workshop participants will likely come to the workshop thinking of one or two of these options. The instructor should help the participants understand that in addition to all of these contractor selection types, RFQs / RFPs are also typically used for almost all design team selections. It should be emphasized that the goal of the workshop is to provide guidance and best practices for all selection processes where RFQs and RFPs are utilized.

Linking these "selection types" to any local terminology, or just using the local selection terminology, may be helpful. For example, many state and local jurisdictions refer to Best Value: Total Cost as "Competitive Sealed Proposal" or "CSP."

Team Selection Principles (Slide 7):

The principles identified in Slide 6 are the foundation for the entire Workshop. These principles must not be modified, as failure to abide by these principles would be contrary to best practices.

#### Selection Committee Guidelines (Slide 9):

Review these guidelines carefully with Workshop participants, being certain they understand the importance of a knowledgeable and committed Selection Committee.

#### Context (Slide 14):

If the presentation is being tailored to a specific role (e.g., architect, construction manager, engineer, etc.), this slide presents a good opportunity to use some examples. For instance, at the "Any history relevant to the assignment" arrow, if an architect is being selected, and the subject building is on the National Register of Historic Places, this is important information of which the competing architectural firms should be advised.

#### Objectives and Scope of Services (Slide 15):

This is a good opportunity for discussion of examples, which can be tailored to the Workshop audience.

#### Sample Respondent Selection Matrix (Slide 26):

Prior to the Workshop, prepare at least one fully completed Sample Respondent Selection Matrix (see sample – page 8), inserting sample names of firms in the top row, as well as weightings, ratings, scores and totals. Walk the Workshop participants through the process, clearly explaining how you developed or calculated each number. Explain how the weightings will impact the scores. This is one of the more important slides in the Workshop, so be certain that the participants understand the process before proceeding. A copy of the Matrix, with formulas and examples, is attached to this instructor guide.

#### Keep Expectations Reasonable (Slide 28):

Emphasize the importance of only requesting information that is necessary to make a decision. Discuss the benefit of limiting the number of pages for both the RFQ/RFP and the responses. Information overload will not benefit the Selection Committee; rather, it will make their task more difficult.

#### Interview Planning (Slides 31 and 32):

Emphasize that planning and preparation are the keys to success. Interviewers must have a clear understanding of the process. The use of role-playing to simulate some good interview questions and answers can help Workshop attendees better understand the benefits of preparation.

Disclosure of Outcome (Slide 35):

Carefully explain how much effort goes into the preparation of an RFQ/RFP response. Help the Workshop participants understand that the respondents, through all of their preparation efforts, have earned the benefit of transparent results. This approach will also help the respondents to improve their future responses, which will benefit the entity issuing future RFQs and RFPs.

Questions and Discussion (Slide 38):

There are likely to be a substantial number of questions and comments, so leave plenty of time to accommodate them. Encourage this interaction, but be certain to reinforce the Team Selection Principles (Slide 7) with all responses, as these principles are the key to success.

#### E. Special Consideration

Be aware that Workshop attendees may come to the Workshop with their own ideas as to best practices, and they may need to be convinced that the practices presented in the Workshop are truly "best practices".

Also, there may be certain laws, ordinances and regulations which limit the degree to which some of these best practices can be implemented.

#### F. Survey of Participants

Please distribute a Workshop Participant Survey (see sample-page 9), or a similar survey developed by the instructor or Workshop sponsor, to the participants upon completion of the Workshop. AGC requests that the instructor collect the surveys, summarize the survey responses, and forward a summary of these responses in Microsoft Word format to Michael Stark, AGC of America's Senior Director, Building Division, at [curriculum@agc.org](mailto:curriculum@agc.org).

#### G. Reference Materials

Please see the following page for a list of reference materials, available on AGC of America's website or in the AGC Store at <http://store.agc.org/>.

## **RFQ / RFP Best Practices Workshop Additional Reference Materials**

The following reference materials are available on AGC of America's website or in the AGC Store at <http://store.agc.org>.

- A) [AGC of America Project Delivery Website](#).
- B) [Best Practices for Use of Best Value Selections](#). The Associated General Contractors of America and The National Association of State Facilities Administrators. 2008.
- C) [Project Delivery Systems for Construction-3rd Edition](#) (#2916). Michael E. Kenig. The Associated General Contractors of America. 2011.
- D) [AGC–AIA Primer on Project Delivery - Second Edition](#).
- E) [Qualifications Based Selection of Contractors](#). The Associated General Contractors of America. 2009.
- F) [CM/GC Guidelines for Public Owners-2nd Edition](#) (#2912). The Associated General Contractors of America and The National Association of State Facilities Administrators. 2007.
- G) [Integrated Project Delivery for Public and Private Owners](#). National Association of State Facilities Administrators, Construction Owners Association of America, APPA: The Association of Higher Education Facilities Officers, Associated General Contractors of America and American Institute of Architects (AIA). 2010.

## Possible RFQ / RFP Applications for Construction

<b>DELIVERY METHOD</b> Common Nicknames	<b>Low Bid</b>	<b>Best Value: Total Cost</b>	<b>Best Value: Fees</b>	<b>Qualifications Based Selection (QBS)</b>
<b>Design-Bid-Build</b> Competitive Sealed Bid; Invitation to Bid (ITB)	<b>Invitation to Bid</b>	<b>RFQ/RFP</b>	<b>n/a</b>	<b>n/a</b>
<b>CM at-Risk</b> CM/GC; CMc	<b>n/a</b>	<b>n/a</b>	<b>RFQ/RFP</b>	<b>RFQ/RFP</b>
<b>Design-Build</b>	<b>Invitation to Bid</b>	<b>RFQ/RFP</b>	<b>RFQ/RFP</b>	<b>RFQ/RFP</b>
<b>IPD</b> Multi-party	<b>Not Typical</b>	<b>Not Typical</b>	<b>RFQ/RFP</b>	<b>RFQ/RFP</b>

**RFQ/RFP's** (indicated by a red arrow pointing to the 'Best Value: Total Cost' column)

Source: Project Delivery Systems for Construction, 3<sup>rd</sup> Edition, AGC of America, 2011

**Sample Respondent Selection Matrix**

1	A	B	C	D	E	F	G	H
2		<b>Respondent Organization Names</b>						
3	Key to ratings: 1 to 10 scale, with 1 being unacceptable, 10 being excellent							
4	<b>Selection Criteria</b>	<b>Weighting</b>	<b>Rating</b>	<b>Score</b>	<b>Rating</b>	<b>Score</b>	<b>Rating</b>	<b>Score</b>
5	(Calculations)	(Insert)	(Insert)	(B7xC7)	(Insert)	(B7xE7)	(Insert)	(B7x G7)
6	Example	10%	5	0.5	7	0.7	8	0.8
7	Demonstrated experience of firm with projects of similar nature & size	10%						
8	Demonstrated experience of individuals (proposed by respondent) with assignments of similar nature	10%						
9	** Ability to meet proposed schedule, based upon available staff and other resources	15%						
10	** Acceptability of proposed approach to assignment (i.e., is respondent's proposed approach to the assignment acceptable)	10%						
11	Results of reference contacts for similar assignments	15%						
12	Assessment of quality of work	15%						
13	** Assessment of financial capability, based upon review of firm's financial statements	15%						
14	** Assessment of proposed pricing	10%						
15	<b>Totals</b>	<b>100%</b>		Sum(D7:D14)		Sum(F7:F14)		Sum(H7:H14)
	<b>Additional Information:</b>							
	Insurance Status: meet requirements?							
	Fee Proposal Amount							
	Other Relevant Information							

\*\* Items marked with double asterisk would probably not be applicable in an RFQ process



# RFQ / RFP Best Practices Workshop

## Participant Survey

The team that developed this Workshop wishes to ensure that its content will be beneficial to all participants. Therefore, please provide your feedback by completing this brief survey, which will be collected by your instructor.

Name: \_\_\_\_\_ Company: \_\_\_\_\_

Email: \_\_\_\_\_ Instructor Name: \_\_\_\_\_

Location of Workshop: \_\_\_\_\_ Date of Workshop: \_\_\_\_\_

1. Did you learn more about the RFQ/RFP process from this Workshop?  Yes  No
2. Did you find the content to be relevant to the types of RFQ's and RFP's you either issue or respond to?  Yes  No
3. Did you come away from the Workshop with information which you feel you can put to good use going forward?  Yes  No

4. Which Workshop topics did you feel were most beneficial to you?  
\_\_\_\_\_  
\_\_\_\_\_

5. Are there any topics you feel should be added to the Workshop?  
\_\_\_\_\_  
\_\_\_\_\_

6. Were there any Workshop topics which you feel were unnecessary?  
\_\_\_\_\_  
\_\_\_\_\_

7. Would you recommend this Workshop to others?  Yes  No

8. Please provide any additional comments you have regarding the Workshop.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_