

RFQ / RFP Best Practices Workshop

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Developed by the
AGC of America
Team Selection Guidelines Task Force

AGC of America
THE ASSOCIATED GENERAL CONTRACTORS OF AMERICA

Quality People. Quality Projects.



Workshop Planning Guide for RFQ / RFP Best Practices Workshop

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A. Overview

The RFQ / RFP Best Practices Workshop is intended to educate attendees as to the best practices for:

- developing Requests for Qualifications (RFQs) and Requests for Proposals (RFPs),
- evaluating the information received,
- interviewing the respondents, and
- selecting the best respondent for the assignment.

The intended audience is primarily those individuals who will be issuing RFQs and RFPs, but other industry professionals can also benefit from knowledge of these best practices, in that they may be able to better understand such practices and how Owners approach team selection.

B. Presentation Formats

This Workshop can be presented in a number of different formats, two of which are detailed below.

Format Option 1: Best Practices Workshop Only - The Workshop can be presented by an instructor as a stand-alone PowerPoint presentation, with a question and answer session following the PowerPoint. This format can typically be completed in 1.5 to 2 hours.

Format Option 2: Best Practices Workshop and Panel Discussion - The PowerPoint presentation can be supplemented by a panel discussion among industry experts, thereby expanding the overall content and offering further potential for interaction. This format can typically be completed in 2.5 to 3 hours.

C. Planning

Format Option 1 is relatively simple to execute, as it simply requires an appropriately sized meeting room, a laptop computer, a projector, and an instructor knowledgeable in the development and implementation of RFQs and RFPs.

Format Option 2 requires a bit more planning, but is still not difficult to manage. In addition to the items required for Option 1, the presenting organization must identify a limited number of individuals (approximately three to six) with the appropriate knowledge to discuss the RFQ and RFP process. It is beneficial to have individuals representing owners, architects and contractors as members of the panel, as well as attorneys and others who may have expert knowledge of the procurement process. One individual should be identified as the moderator of the panel, and the moderator should take overall responsibility for organizing the panel discussion segment of the presentation.

The panel members should receive the PowerPoint well in advance of the presentation date, and one or more conference calls or meetings should be scheduled prior to the presentation date, during which the participants can determine the issues they wish to address, and how they wish to address them.

It is important that all panel members reinforce the principles presented in the PowerPoint presentation, as the intent of this program is to encourage adherence to those principles.

The purpose of the panel discussion, if this option is selected, is to offer an opportunity for the panel and the attendees to discuss their experiences and perspectives, highlight regional, state and/or local procurement requirements and to encourage the use of the best practices.

D. Summary

Regardless of the format of the Workshop, it is important to engage the audience in the process. Therefore, every effort should be made by the individual presenting the PowerPoint, and by the panel if Option 2 is selected, to encourage questions and audience interaction. Communication among those issuing RFQs and RFPS and those responding to those requests will provide the best opportunity for making the process a more satisfactory experience for everyone involved.

Any questions regarding this Workshop can be directed to Michael Stark, AGC of America's Senior Director, Building Division at starkm@agc.org.

RFQ / RFP
Best Practices Workshop

Instructor Guide
For
PowerPoint Presentation

Developed by the
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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.

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.

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



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

Red arrows pointing to the 'Best Value: Total Cost' column for Design-Bid-Build and IPD, labeled 'RFQ/RFP's'.

Source: Project Delivery Systems for Construction, 3rd Edition, AGC of America, 2011

Sample Respondent Selection Matrix

1	A	B	C	D	E	F	G	H
2			Respondent Organization Names					
3	Key to ratings: 1 to 10 scale, with 1 being unacceptable, 10 being excellent							
4	Selection Criteria	Weighting	Rating	Score	Rating	Score	Rating	Score
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	Totals	100%		Sum(D7:D14)		Sum(F7:F14)		Sum(H7:H14)
	<u>Additional Information:</u>							
	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.

You Are Invited to Attend the Upcoming . . .

RFQ/RFP BEST PRACTICES WORKSHOP

Note: This Workshop is primarily intended for Owners and others procuring design and construction services, but it may also prove to be educational for others involved in the RFQ/RFP process.

*Learn the best practices for developing RFQ's and RFP's,
evaluating the information you receive, interviewing the respondents
and selecting the best respondent.*

*(insert date)
(insert location)
(insert time) Registration
(insert time) Program*

Owners: Are you making the most of your RFQ/RFP process? Does your procurement process achieve the results you are looking for and meet your needs? Are you using industry best practices? Learn how to manage this process in a manner which will deliver the best outcome for your organization.

Contractors and Designers: Your attendance at this workshop will provide an opportunity to interact with Owners, and will help you to fully understand the best Owner practices for procurement of design and construction services.

Participants will learn industry best practices based upon the research and experience of industry professionals. The goal of this program is to teach best practices for selection of various service providers involved in the design and construction process. Owner representatives responsible for procuring services from designers, consultants, contractors, construction managers and others will benefit from this workshop.

Cost for this event is \$ *(insert registration fee amount)* **for each attendee** *(Duplicate this form for additional attendees.)*

Please fill in all fields, especially email address, as confirmations will be sent via email the week of the event!

Company/Organization: _____ **Main Phone:** _____

Attendee 1 Name: _____ **Email:** _____

Title: _____

Attendee 2 Name: _____ **Email:** _____

Title: _____

Total Amount Due \$ _____

☐ Visa ☐ MC ☐ AmEx ☐ Discover **Card #:** _____ **Security Code:** _____ **Exp:** _____

Name on Card: _____ **Signature:** _____

OR ☐ **Check enclosed:** Payable to *(Insert Name of Presenting Organization)*

Regardless of payment type, please return a copy of this completed form to *(Insert Name of Presenting Organization)* OR fax it to *(Insert fax number)*. Registration deadline is *(Insert date)*. Contact *(Insert contact name, phone and email address)* with any questions.

You Are Invited to Attend the Upcoming . . .

RFQ/RFP BEST PRACTICES WORKSHOP

Note: This Workshop is primarily intended for Owners and others procuring design and construction services, but it may also prove to be educational for others involved in the RFQ/RFP process.

Attend this Workshop to learn the best practices for developing RFQ's and RFP's, evaluating the information you receive, interviewing the respondents and selecting the best respondent for the assignment.

This Workshop will also include a panel discussion of best practices by industry professionals, where you'll have the opportunity to ask questions and solicit feedback.

(insert date)
(insert location)
(insert time) Registration
(insert time) Program

Owners: Are you making the most of your RFQ/RFP process? Does your procurement process achieve the results you are looking for and meet your needs? Are you using industry best practices? Learn how to manage this process in a manner which will deliver the best outcome for your organization.

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Company/Organization: _____ **Main Phone:** _____

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Title: _____

Attendee 2 Name: _____ **Email:** _____

Title: _____

Total Amount Due \$ _____

☐ Visa ☐ MC ☐ AmEx ☐ Discover **Card #:** _____ **Security Code:** _____ **Exp:** _____

Name on Card: _____ **Signature:** _____

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PowerPoint Presentation

RFQ / RFP Best Practices Workshop

1

Presented by

(Insert name of presenting organization)

(Insert name and contact info for instructor)

2

Purpose

- This workshop outlines the **best practices for selection** of various service providers involved in the design and construction process
- These team members are typically selected through the **Request for Qualifications (RFQ) and Request for Proposal (RFP)** process
- The practices described in this workshop are recommended for use by **any entity procuring such services** from service providers

3

Definitions of RFQ & RFP

- A **Request for Qualifications (RFQ)** is a document issued by a buyer of services to sellers of services, requesting documentation of their general qualifications and experience, to determine whether such sellers are qualified to provide the services required by the buyer. The buyer will typically use the information received in the RFQ process to develop a selected list of best qualified providers. The buyer will then typically issue an RFP to those best qualified providers.
- A **Request for Proposal (RFP)** is a document issued by a buyer of services to sellers of services, requesting much more specific documentation of their experience, capabilities, resources and related costs, thereby allowing the buyer to determine which seller is best suited to complete the specific assignment required by the buyer

4

When to Use RFQs & RFPs

- RFPs and RFQs are typically used for:
 - Qualifications Based Selection
 - Best Value Selection Based on Fees
 - Best Value Selection Based on Total Cost
- RFQs can also be used for:
 - Prequalification of service providers

5

Team Selection Principles

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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

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Selection Committee Guidelines

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Selection Committee Guidelines

1. It is recommended that the Selection Committee be limited to no more than **seven members**, representing the major project stakeholders
2. Participation by those with **working knowledge** of the profession being selected is recommended
3. Confirm that all Committee participants are prepared to **devote the time** and effort necessary to complete the process properly
4. Confirm that all Committee members **understand the team selection principles and process**, providing training to any individuals as necessary

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RFQ / RFP Best Practices

Most of the best practices contained in this workshop apply to both RFQs and RFPs. Whenever this is not the case, it will be noted.

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Content of Invitations

Invitations to respond to RFQs and RFPs should contain the following information, at minimum:

- Name, address and contact information (phone and email) for entity requesting the response
- Date and time when response is due
- Basic description (one paragraph) of the services being procured
- Date, time and location of any required on-site visits or pre-response meetings
- A requirement that invited respondents **confirm by a specific date and time whether or not they will submit** a response to the RFQ / RFP

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RFQ / RFP Content & Structure

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Contact

- RFQs and RFPs must include the name and contact information (phone and email) of the individual to whom questions should be addressed
- Contact should be limited to the individual noted above; contact to other Committee Members should be deemed to be grounds for disqualification of respondent
- All questions should be directed to one individual, and all responses to questions should be issued by one individual, to eliminate the possibility of conflicting responses
- All questions must be documented and responses to all questions must be provided in writing to all respondents
- Provide contact information for others with whom respondents must interact, such as security personnel for site visits, if applicable

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Context

RFQs & RFPs should include the following contextual information:

- Basic information about the entity issuing the request (organization's mission, size of organization, etc.)
- Any history relevant to the assignment
- **Schedule for every significant step** in the entire RFQ / RFP process, from date of issuance to final decision (Date request issued, last date for questions, etc.)
- Any additional information which would be beneficial to the respondents' understanding of the assignment

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Objectives & Scope of Services

- Define your project objectives in very clear terms
- Define the scope of the required services in very specific terms
- **Failure to clearly identify your objectives and the scope of the required services will likely lead to responses which cannot be fairly compared**

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Contractual Requirements

- Identify **the form of contract** (and general conditions, if applicable) to be utilized for the assignment
- Clearly identify any affirmative action, local participation or similar requirements
- Clearly define any confidentiality requirements

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Minimum or Unusual Requirements

- If there are **any threshold requirements**, identify them very clearly, so as not to waste your time or the respondents' efforts
(Examples: Respondent's main office must be located in the state in which the project is located; work must be performed under a Project Labor Agreement, etc.)
- If there are any unusual requirements, provide details
(Example: All work must be performed on weekdays between 7:00 PM and midnight)

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Selection Criteria

- Clearly **identify the criteria upon which your selection will be based**
(Experience with relevant assignments, safety record confirming safe performance, etc.)
- Clearly **identify the weighting** of each of the selection criteria
(Example: Respondents' relevant experience will account for 20% of their overall rating)
- Criteria for RFPs will typically be more detailed than for RFQs, and weighting will also be different
- Responses to RFQs are generally utilized by the issuer to select a "short list" of respondents for an RFP

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Format of Deliverables

1. Identify the format of deliverables (electronic in .pdf format, hard copy, etc.)
2. If hard copy, identify the size of the deliverables, keeping the size appropriate to the requested materials
(Example: 8-1/2" by 11")
3. Identify **the sequence** in which the deliverables are to be organized, which should mirror the sequence of the RFQ / RFP. This will make your retrieval of the information easier when you receive the responses
4. For deliverables which involve numbers, **provide tables** to be filled in by the respondents
5. Identify the acceptable volume of deliverables
(Example: Proposal content shall not exceed 25 pages)
6. Identify the number of copies which must be submitted for each type of hard copy deliverable

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Content of Deliverables

- Define deliverables in very specific terms, to ensure that **all responses will be comparable**
- Be sure the deliverables directly address your selection criteria, preferably in **measurable terms**
- Be sure the **deliverables are achievable**
(Example: Don't ask for a schedule for the assignment if you have not provided all of the information upon which the schedule must be based.)

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Examples of Deliverables

- Provide the project name, project address, approximate project value, approximate project square footage and owner contact information for five projects completed by your organization which you deem to be **similar** to the project identified herein (RFQ's)
- Provide resumes for the specific individuals in your firm which you propose to assign to this project, and project details for at least three prior projects for which they were responsible which are similar to the project identified herein (RFP's)

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Pricing Deliverables

(Not applicable for RFQs and some RFPs)

- Deliverables for **pricing must be very clearly defined** and **kept separate** from the technical portion of the response. All deliverables NOT related to price should be judged prior to considering any pricing.
- If certain items are to be chargeable and others are to be included in the respondent's fee, prepare a chart listing all likely costs and **identifying which billing category applies** to each of those costs
- The key issue: you **MUST** establish a format for submission of pricing information which will **allow you to compare costs** for the same services from all respondents on a fair and equal basis

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Acceptance of Responses

- In fairness to all, it is best to require that all respondents **meet all RFQ / RFP requirements**
(Examples: mandatory attendance at scheduled pre-submission meeting; rejection of late submissions, etc.)
- If you **DO** plan to retain the right to waive any of the stated requirements (which is **NOT** recommended), then state this in the RFQ / RFP

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Analysis of Responses

- Prepare **a matrix** which will allow you to develop a fair and accurate comparison of the responses
- Limit matrix content to the selection criteria established in the RFQ / RFP. The **established criteria and weighting must be strictly followed**.
- Pay careful attention to whether respondents followed the instructions contained in the RFQ / RFP. (If they did not follow instructions, it may indicate that they will not do so during the assignment.)

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Analysis of Responses

- If there are any threshold requirements (such as “respondent’s main office must be located in-state”), they should be judged on a pass/fail basis, rather than being rated on a numeric basis
- If deliverables include pricing, any proposals which are more than 15% lower than the others should be considered outliers, and should receive a greater level of scrutiny

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Sample Respondent Selection Matrix

Selection Criteria	Weighting	Respondent Organization Names					
		Rating	Score	Rating	Score	Rating	Score
Key to ratings: 1 to 10 scale, with 1 being unacceptable, 10 being excellent							
Demonstrated experience of firm with projects of similar nature & size	10%						
Demonstrated experience of individuals (proposed by respondent) with assignments of similar nature	10%						
** Ability to meet proposed schedule, based upon available staff and other resources	15%						
** Acceptability of proposed approach to assignment (i.e., is respondent's proposed approach to the assignment acceptable)	10%						
Results of reference contacts for similar assignments	15%						
Assessment of quality of work	15%						
** Assessment of financial capability, based upon review of firm's financial statements	15%						
** Assessment of proposed pricing	10%						
Totals	100%						
Additional Information:							
Insurance Status: meet requirements?							
Fee Proposal Amount							
Other Relevant Information							

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

Tips for Best RFQ / RFP Results

- ✓ Take the time to develop your RFQ / RFP carefully and ensure that it **addresses all of the selection criteria** shown in your Selection Matrix
- ✓ **The time you invest** in writing a complete RFQ / RFP will pay substantial dividends when you must analyze the responses
- ✓ In general, if there is information which the respondents would need to know in order to understand what you will require or what it will cost them to deliver it, it should be clearly defined in your RFP
- ✓ The best value provider is not necessarily the lowest cost provider; carefully examine all information provided

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Keep Expectations Reasonable

- **Don't ask for information which you do not need** in order to make your decision
- **Allow enough response time** for proper preparation of the requested information
- Remember that respondents have a limited amount of time and resources to address your RFQ / RFP, and are often doing so at their own expense

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RFQ / RFP Summary

- When issuing RFQs or RFPs for services from vendors, consultants, or contractors, it is essential that you **clearly communicate your requirements and the deliverables** which you expect to receive
- Your request must be structured in a manner which will **allow you to effectively compare** the responses on an fair and equal basis
- **The time you invest** in the development of a properly structured RFQ / RFP will pay substantial dividends when you reach the point when the responses must be analyzed
- **Transparency and fairness** throughout the process are essential

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Interview Best Practices

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Interview Planning: Interviewers

- Distribute copies of the RFQ or RFP (as issued) and all qualification / proposal packages to the interviewers far enough **in advance** to ensure that they will be read before the interviews
- If the interviewers will be judging the respondents against the established selection criteria, i.e., if this will not be done by others prior to the interviews (the former being the recommended practice), provide them with **copies of the Selection Matrix well in advance** of the interviews. **Clearly communicate the selection criteria and weightings** to the interviewers
- Schedule a **pre-interview conference call or meeting** with the interviewers prior to the interviews, to ensure that all participants understand the documents and the process

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Interview Planning: Interviewees

- Communicate all of **your interview plans** to the interviewees in writing, at the point when they are invited
- Advise the interviewees of the **issues you want them to address**, the amount of time allotted for same, and the amount of time allotted for questions
- If you have specific **presentation preferences**, such as direct discussions in lieu of PowerPoint presentations, inclusion of the specific individuals proposed for the assignment, etc., advise the interviewees of those preferences in advance
- **Leave sufficient time** between interviews for discussion by the interviewers; if in doubt, leave more time

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Interview Process

- **Treat all interviewees fairly and equally**
(Example: Hold all interviewees to their allotted time)
- Be certain that interviewees **address the issues** stated in the interview invitation
- **Listen** for specifics as to how the interviewees will address your stated issues. You are attempting to identify the **best qualified provider, not the best marketer**
- Try to avoid having one interviewer monopolize the question and answer period; give **all interviewers the opportunity to ask their questions**
- If parties other than the interviewers are allowed in the room, those parties should be identified and they should NOT be permitted to question those being interviewed

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Interview Summary

- **Proper planning** will help to ensure good interview results
- **Leave sufficient time** for discussion between interviewers, as this interaction will often produce a more well-rounded view of the interviewees
- Hold **all interviewees to the same standards**, to ensure fair and equal treatment of all parties

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Disclosure of Outcome

- Prior to disclosure, depending upon the awarding party's policies, **names** of all respondents other than the respondent receiving the specific scoring sheet **can be concealed**
- After completion of matrix scoring and decision regarding selection, **disclose results to all respondents**
- It is helpful to offer all respondents the opportunity for **a post-award meeting or de-brief**, so they may learn where they can improve. Contact for such meetings should be arranged only through the original sole contact

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Conclusion

- Selection of the right team for an assignment is often the single **most important determinant** of the assignment's success or failure
- Unless otherwise dictated by law or regulation, be careful to **look for the best value**, which may not necessarily be provided by the lowest cost provider
- Be certain that all **questions are answered** to your satisfaction; if not, pursue them further
- **Do not allow time pressures to force a rush** to judgment, as the time which will be lost working with the wrong provider can overshadow the minimal time required to make the right initial selection

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Questions and Discussion

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