RFP Administration & Leadership

RFP Training Course

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Agenda

- **RFP Scheduling Tips & Challenges**
- **Facilitating the RFP Process**

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Putting RFP Excellence Into Practice

- Fair
- Open
- Transparent
- Value
- Integrity

Strategic Objective:

Become a "Client of Choice" and attract High-Performing Vendors across your RFPs

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1) Define the Project SOW

General Procurement Process

Statement of Work

1 SOW

Also known as…

- Scope of W… SO
- Specif…
- Requ…
- Minimu…

SOW:

What you are Hiring the Vendor to do

Contract

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1) Define the Project SOW

General Procurement Process

Statement of Work

1 SOW

Contract

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2) Advertise the RFP (and SOW)

General Procurement Process

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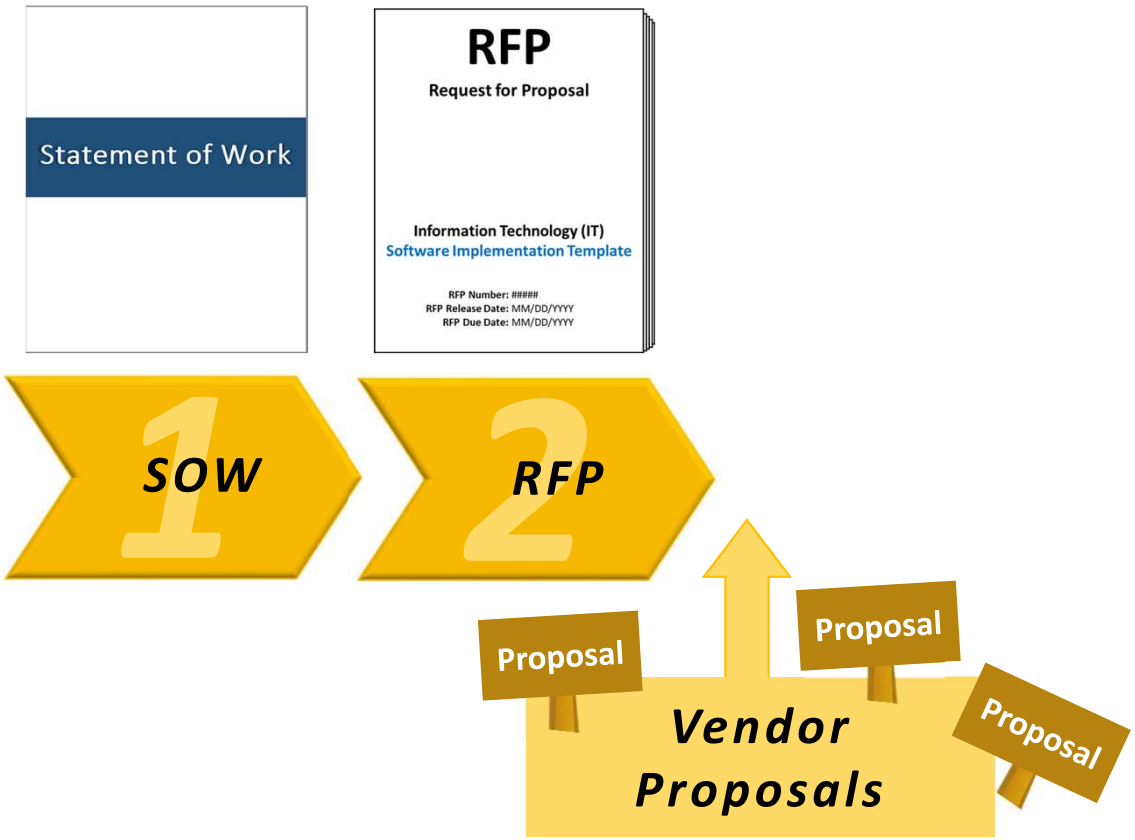
Vendors Respond with Proposals

General Procurement Process



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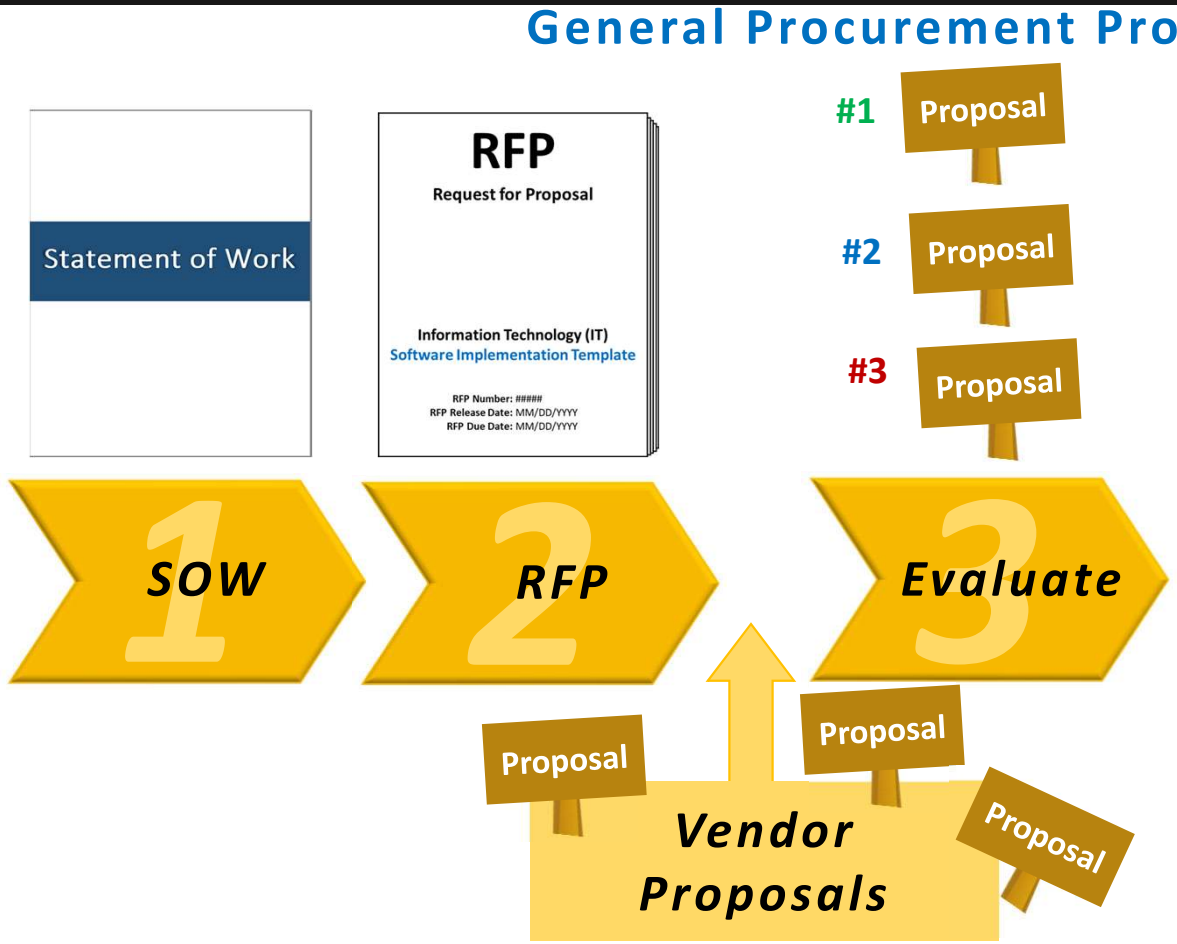
3) Evaluate the Proposals



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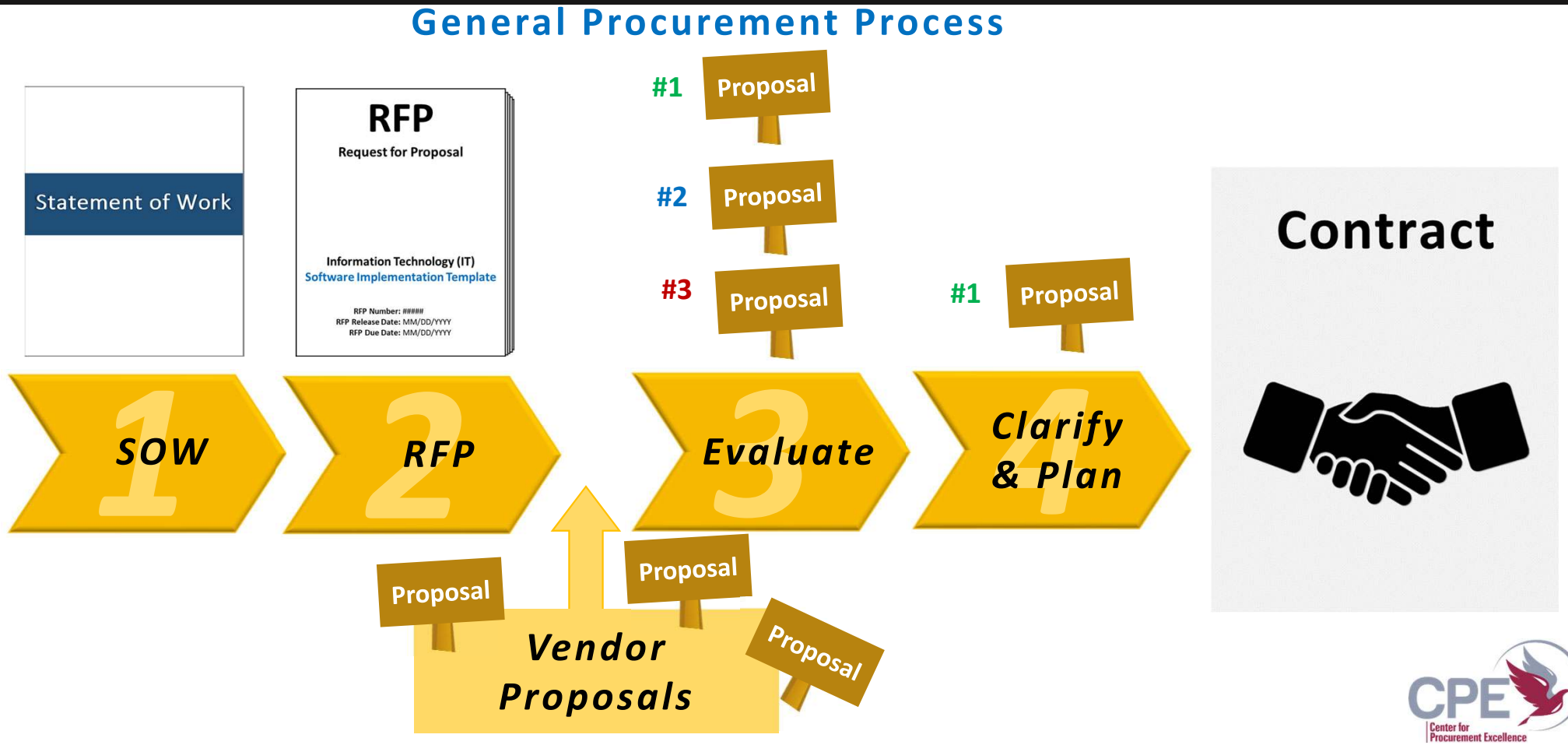
4) Select the Top-Evaluated Vendor(s)



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RFP Scheduling Tips & Challenges

RFP Training Course

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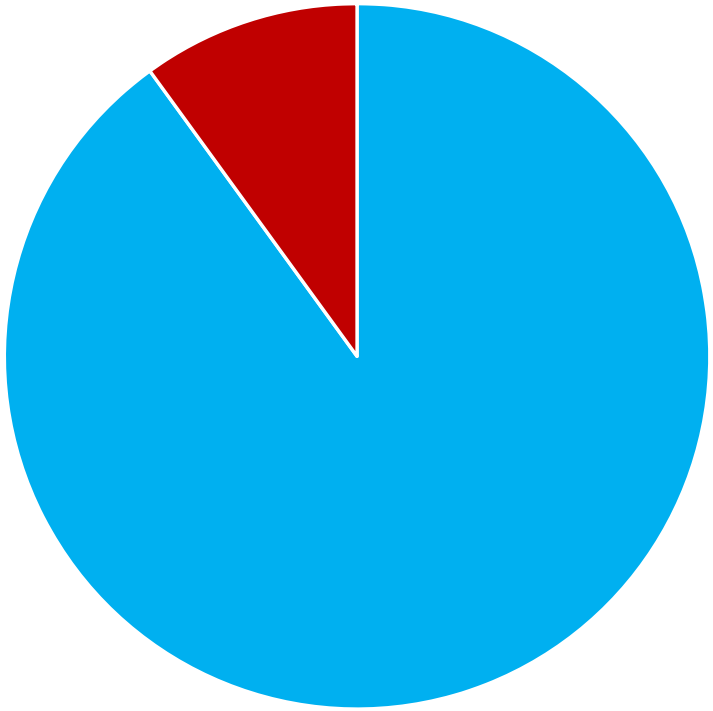
Clients Will Inform You That Their Project Is…



90% Urgent

10% Extremely Urgent

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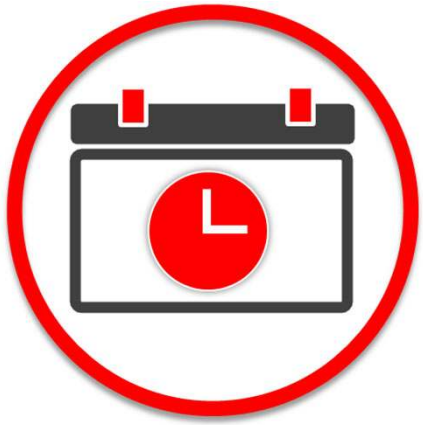
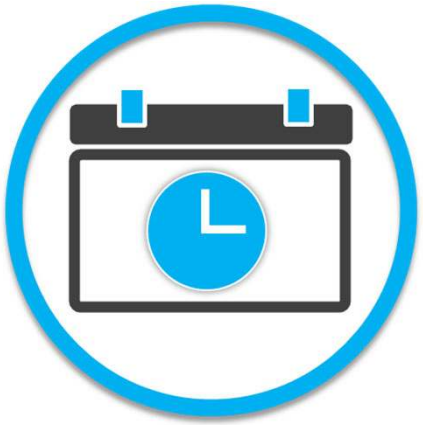


Project / Service



Procurement

Internal

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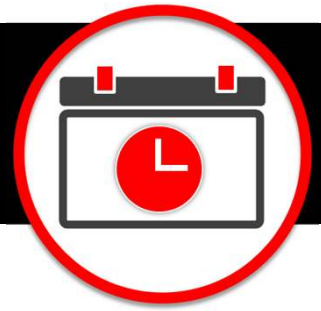
Project / Service Schedule



- **Identifies the critical dates that are related to the project itself.**

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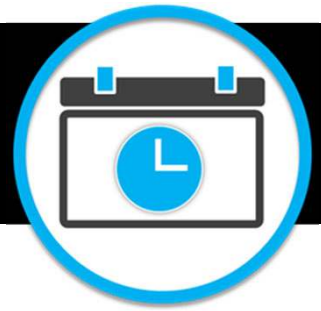
Procurement Schedule



- **Communicate to the Vendors the critical procurement timelines**

- **Activities & topics related to the procurement process**

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1) Planning Phase

Plan & prepare for the start of the formal RFP Process

- **Needs Assessment**
- **Business Case**
- **Funding & Budgets**
- **Approvals**
- **Contract Strategy**
- **Market Analysis**

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Schedule Activities

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Advertisement Period

Procurement Activities

1 **Advertise / Issue the RFP**

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

2 **Proposal Due Date**

4-6 Weeks

3 **Award Date**

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Issuing Your RFP

- Also called ‘posting’ or ‘advertising’
- Informs your Vendor community about your project/service need
- Vendors can then review your solicitation and begin their formal response

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How Do Owners Advertise?

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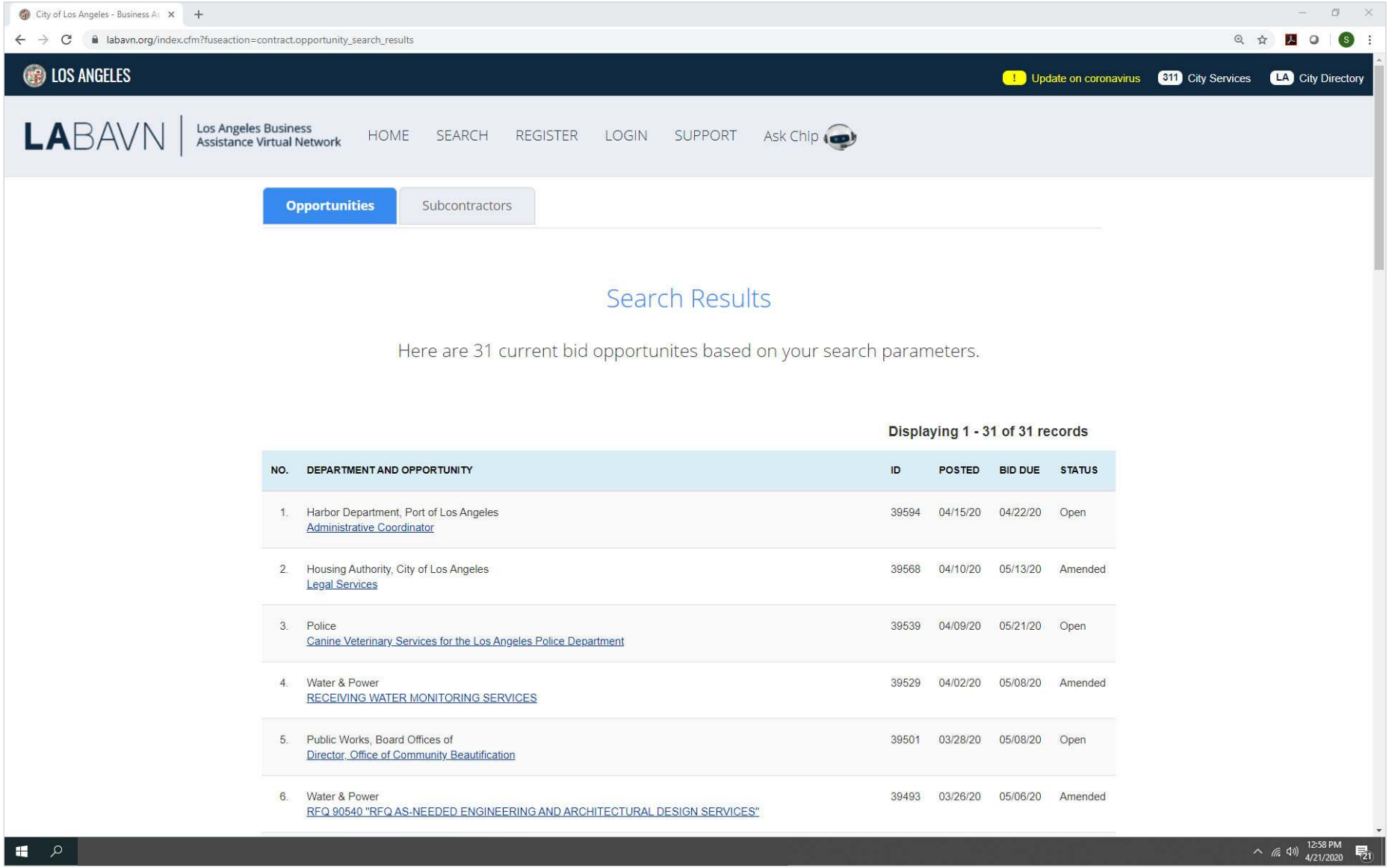
WALL STREET JOURNAL
MONDAY, JUNE 17, 1996
What's News
FINANCIAL TIMES
Media futures
Rattling the phone companies
Lucy Kellaway
Today's surveys
Vietnam; Devon and Cornwall
Le Monde des INITIATIVES
DEMAIN
DANS
INITIATIVES
EMPLOI
Les premiers pas dans la vie active
ANNONCES CLASSÉES
Libération
MONDE. Syrie-Turquie
Tension entre Damas et Ankara
FRANCE. Deux-Sèvres
Le Marais poitevin vidé
Horst Stern: Reise durch ostdeutsche Landschaften (Seite 6
DIE ZEIT
WOCHENZEITUNG FÜR POLITIK · WIRTSCHAFT · HANDEL UND KULTUR
Tea amo!
21. Juni 1996, 51. Jahrgang
Frankfurter Allgemeine
ZEITUNG FÜR DEUTSCHLAND
Kreml-Intrigen
Herald INTERNATIONAL Tribune
PUBLISHED WITH THE NEW YORK TIMES AND THE WASHINGTON POST
Paris, Friday, June 21, 1996
Yeltsin Dismisses Hard-L
Russie : un général arbitre du second tou
La Tribune
QUOTIDIEN ■ MARDI 18 JUIN 1996
Paris CAC 40 + 0,06 %
New York DJ − 0,08 %
Dollar Paris 5,1535 FF


City of Los Angeles - Business A
labavn.org/index.cfm?fuseaction=contract.opportunity_search_results
LOS ANGELES
Update on coronavirus
311 City Services
LA City Directory
LABAVN
Los Angeles Business Assistance Virtual Network
HOME
SEARCH
REGISTER
LOGIN
SUPPORT
Ask Chip
Opportunities
Subcontractors
Search Results
Here are 31 current bid opportunites based on your search parameters.
Displaying 1 - 31 of 31 records
NO. DEPARTMENT AND OPPORTUNITY ID POSTED BID DUE STATUS
1. Harbor Department, Port of Los Angeles
Administrative Coordinator
39594 04/15/20 04/22/20 Open
2. Housing Authority, City of Los Angeles
Legal Services
39568 04/10/20 05/13/20 Amended
3. Police
Canine Veterinary Services for the Los Angeles Police Department
39539 04/09/20 05/21/20 Open
4. Water & Power
RECEIVING WATER MONITORING SERVICES
39529 04/02/20 05/08/20 Amended
5. Public Works, Board Offices of
Director, Office of Community Beautification
39501 03/28/20 05/08/20 Open
6. Water & Power
RFQ 90540 "RFQ AS-NEEDED ENGINEERING AND ARCHITECTURAL DESIGN SERVICES"
39493 03/26/20 05/06/20 Amended
12:58 PM
4/21/2020

IFMA
International Facility Management Association

NASPO
National Association of
State Procurement Officials

CAUBO
ACPAU

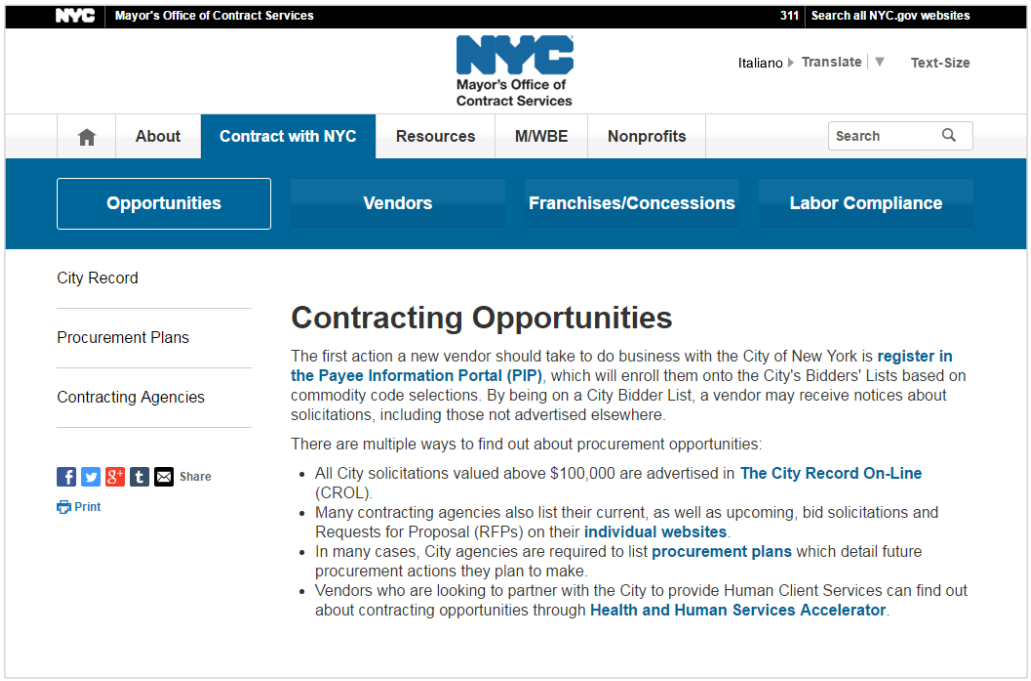
ABC
Associated Builders and Contractors

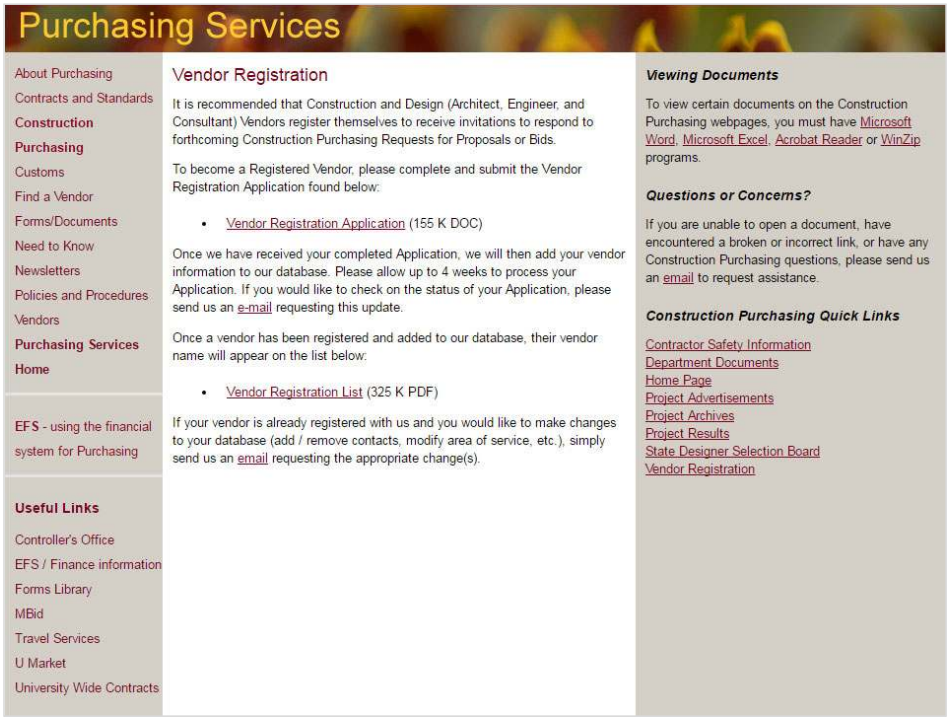
AIA

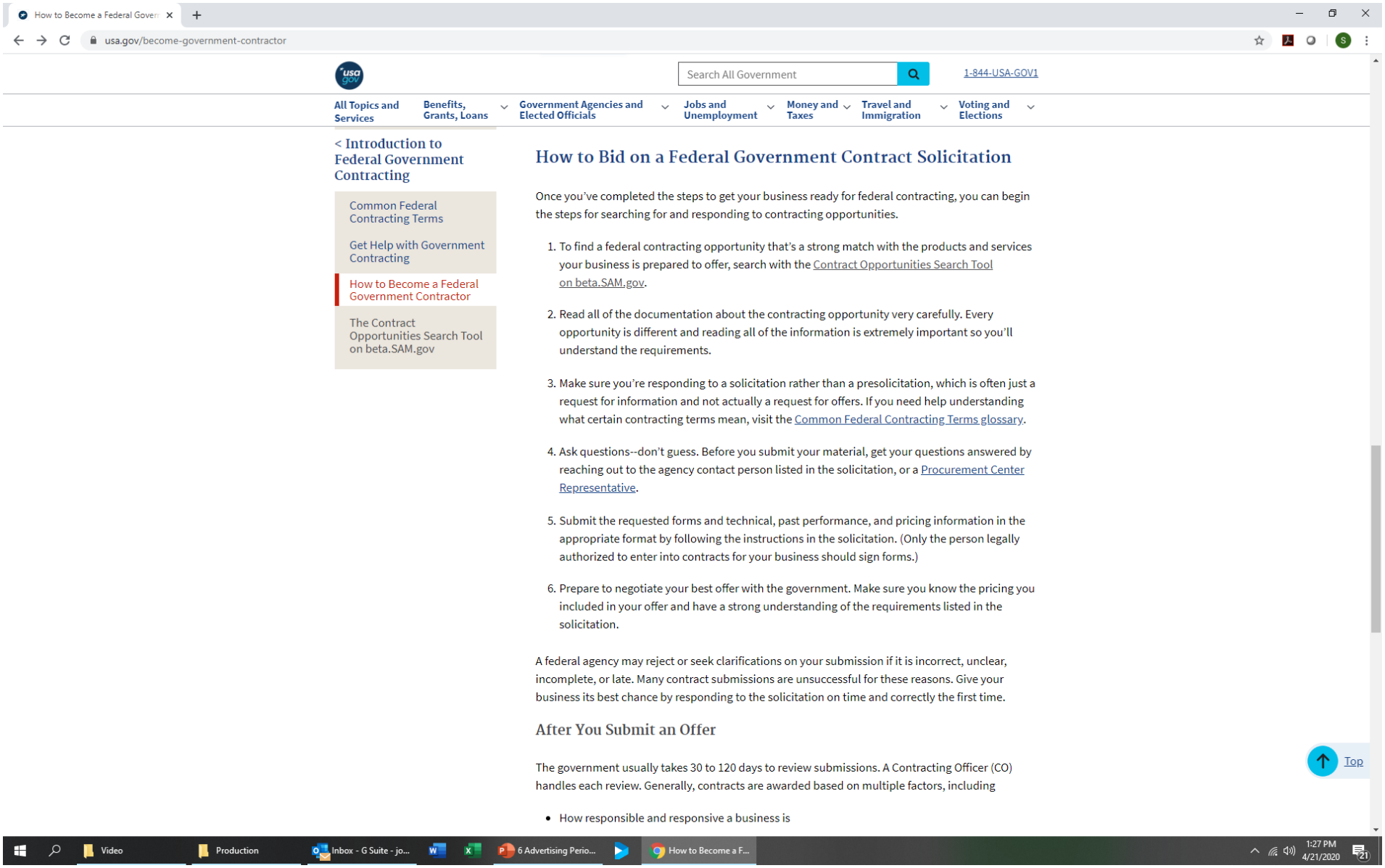
NIGP
THE INSTITUTE
for PUBLIC PROCUREMENT

ISM
INSTITUTE FOR SUPPLY MANAGEMENT

AGC
THE CONSTRUCTION
ASSOCIATION


NYC Mayor's Office of Contract Services
311 Search all NYC.gov websites
NYC Mayor's Office of Contract Services
Italiano Translate Text-Size
About
Contract with NYC
Resources
M/WBE
Nonprofits
Search
Opportunities
Vendors
Franchises/Concessions
Labor Compliance
City Record
Procurement Plans
Contracting Agencies
Share
Print
Contracting Opportunities
The first action a new vendor should take to do business with the City of New York is register in the Payee Information Portal (PIP), which will enroll them onto the City's Bidders' Lists based on commodity code selections. By being on a City Bidder List, a vendor may receive notices about solicitations, including those not advertised elsewhere.
There are multiple ways to find out about procurement opportunities:
All City solicitations valued above $100,000 are advertised in The City Record On-Line (CROL).
Many contracting agencies also list their current, as well as upcoming, bid solicitations and Requests for Proposal (RFPs) on their individual websites.
In many cases, City agencies are required to list procurement plans which detail future procurement actions they plan to make.
Vendors who are looking to partner with the City to provide Human Client Services can find out about contracting opportunities through Health and Human Services Accelerator.


Purchasing Services
About Purchasing
Contracts and Standards
Construction
Purchasing
Customs
Find a Vendor
Forms/Documents
Need to Know
Newsletters
Policies and Procedures
Vendors
Purchasing Services
Home
EFS - using the financial system for Purchasing
Useful Links
Controller's Office
EFS / Finance information
Forms Library
MBid
Travel Services
U Market
University Wide Contracts
Vendor Registration
It is recommended that Construction and Design (Architect, Engineer, and Consultant) Vendors register themselves to receive invitations to respond to forthcoming Construction Purchasing Requests for Proposals or Bids.
To become a Registered Vendor, please complete and submit the Vendor Registration Application found below:
Vendor Registration Application (155 K DOC)
Once we have received your completed Application, we will then add your vendor information to our database. Please allow up to 4 weeks to process your Application. If you would like to check on the status of your Application, please send us an e-mail requesting this update.
Once a vendor has been registered and added to our database, their vendor name will appear on the list below:
Vendor Registration List (325 K PDF)
If your vendor is already registered with us and you would like to make changes to your database (add / remove contacts, modify area of service, etc.), simply send us an email requesting the appropriate change(s).
Viewing Documents
To view certain documents on the Construction Purchasing webpages, you must have Microsoft Word, Microsoft Excel, Acrobat Reader or WinZip programs.
Questions or Concerns?
If you are unable to open a document, have encountered a broken or incorrect link, or have any Construction Purchasing questions, please send us an email to request assistance.
Construction Purchasing Quick Links
Contractor Safety Information
Department Documents
Home Page
Project Advertisements
Project Archives
Project Results
State Designer Selection Board
Vendor Registration


How to Become a Federal Gover
usa.gov/become-government-contractor
Search All Government
1-844-USA-GOV1
All Topics and Services
Benefits, Grants, Loans
Government Agencies and Elected Officials
Jobs and Unemployment
Money and Taxes
Travel and Immigration
Voting and Elections
< Introduction to Federal Government Contracting
Common Federal Contracting Terms
Get Help with Government Contracting
How to Become a Federal Government Contractor
The Contract Opportunities Search Tool on beta.SAM.gov
How to Bid on a Federal Government Contract Solicitation
Once you've completed the steps to get your business ready for federal contracting, you can begin the steps for searching for and responding to contracting opportunities.
1. To find a federal contracting opportunity that's a strong match with the products and services your business is prepared to offer, search with the Contract Opportunities Search Tool on beta.SAM.gov.
2. Read all of the documentation about the contracting opportunity very carefully. Every opportunity is different and reading all of the information is extremely important so you'll understand the requirements.
3. Make sure you're responding to a solicitation rather than a presolicitation, which is often just a request for information and not actually a request for offers. If you need help understanding what certain contracting terms mean, visit the Common Federal Contracting Terms glossary.
4. Ask questions--don't guess. Before you submit your material, get your questions answered by reaching out to the agency contact person listed in the solicitation, or a Procurement Center Representative.
5. Submit the requested forms and technical, past performance, and pricing information in the appropriate format by following the instructions in the solicitation. (Only the person legally authorized to enter into contracts for your business should sign forms.)
6. Prepare to negotiate your best offer with the government. Make sure you know the pricing you included in your offer and have a strong understanding of the requirements listed in the solicitation.
A federal agency may reject or seek clarifications on your submission if it is incorrect, unclear, incomplete, or late. Many contract submissions are unsuccessful for these reasons. Give your business its best chance by responding to the solicitation on time and correctly the first time.
After You Submit an Offer
The government usually takes 30 to 120 days to review submissions. A Contracting Officer (CO) handles each review. Generally, contracts are awarded based on multiple factors, including
• How responsible and responsive a business is
Top
Video
Production
Inbox - G Suite - jo...
6 Advertising Perio...
How to Become a F...
1:27 PM
4/21/2020

Typically About 4-6 Weeks

Procurement Activities	
1	**Advertise / Issue the RFP** • Pre-Proposal Meeting • Site Walk • Deadline to Submit Questions
2	**Proposal Due Date**
3	**Award Date**

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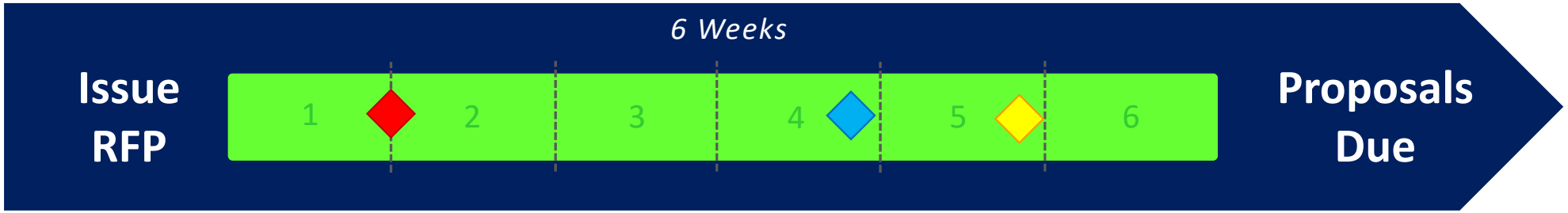
Schedule – Advertisement Period



- Pre-Proposal Meeting
- Deadline For Questions
- Answers

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Evaluation Period

Procurement Activities	
1	Advertise / Issue the RFP
2	**Proposal Due Date** • Proposals Evaluated • Shortlisting • Interviews & Discussions • Negotiations
3	**Award Date**

6-10 Weeks

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Evaluation Period

ACTIVITY	DURATION	START	END	JAN	FEB	MAR	APR
ADVERTISEMENT PERIOD	6 Weeks	1-Jan	12-Feb				
Pre-Proposal Meeting	1 Day	10-Jan	10-Jan				
Site-Walk	1 Day	10-Jan	10-Jan				
Questions Due	4 Weeks	1-Jan	29-Jan				
Answers Posted	1 Week	29-Jan	5-Feb				
Proposal Due Date	1 Day	12-Feb	12-Feb				
EVALUATION PERIOD	9 Weeks	12-Feb	14-Apr				
Proposals Evaluated	3 Weeks	13-Feb	5-Mar				
Initial Shortlist	3 Days	5-Mar	10-Mar				
Notification of Shortlist	1 Week	10-Mar	17-Mar				
Interviews	1 Week	17-Mar	24-Mar				
Identification of Best Offeror	1 Week	24-Mar	31-Mar				
Contract Negotiations	2 Weeks	31-Mar	14-Apr				
AWARD DATE	1 Day	15-Apr	15-Apr				

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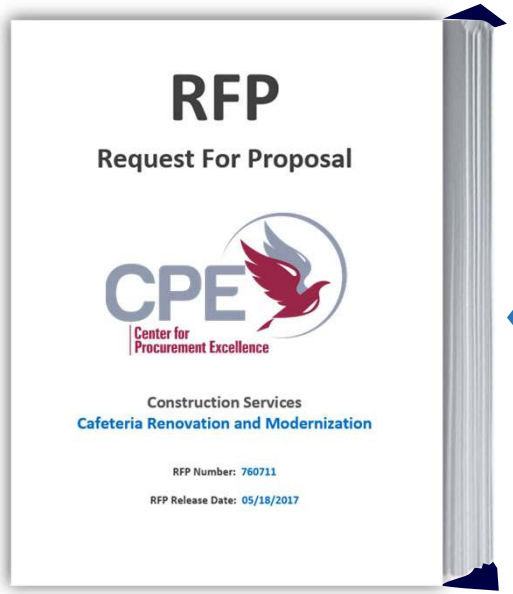
Include the Schedule in the RFP



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

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WINGS AIRLINE
Gate
19
Gate Closes
Class
First Class
Departure
New York JFK
REF No
00800597 524
CANCELLED
CANCELLED
CANCELLED
WINGS AIRLINE
FIRST CLASS

Internal Schedule

- Account for all internal processes and procedures
- Gain commitment from the client and SME's.
- Not shared with your suppliers
- Identify internal processes:
  - Evaluation due date
  - Reasonable and realistic
  - Internal approvals prior to award

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Summary

- Procurement schedule is an important element of every RFP solicitation
- General advertisement period is 4-6 weeks and 6-10 weeks for evaluation
- Provide the suppliers with as much time as possible to propose
- Stick to the schedule

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Workshop

Prepare a Procurement Schedule

Turn to the “Scheduling Workshop” tab

Building a Procurement Schedule

OVERVIEW

One of the best ways to learn about creating an effective procurement schedules is to actually create one! Every procurement has different and unique constraints. Below, you are provided with three (3) scenarios. You task is to make a schedule for each scenario and include any notes/special considerations.

CPE’S RECOMMENDED PROCUREMENT ACTIVITIES AND DURATIONS

Please consider the following typical timelines when you prepare your schedules:

ACTIVITY	TYPICAL DURATION
ADVERTISEMENT PERIOD	4-6 weeks
Pre-Proposal Meeting	1 week after RFP release
Site-Walk	Same day as Pre-proposal meeting *[if needed]*
Questions Due	2-4 weeks after RFP release
Answers Posted	1 week after Questions Due
Proposal Due Date	1-2 weeks after Answers Posted
EVALUATION PERIOD	6-14 weeks
Proposals Evaluated	Completed 2-4 weeks after proposal submitted
Initial Shortlist	1-5 days after proposals evaluated
Shortlist Notification	1-10 days after shortlist complete
Interviews	1 week after Shortlist Notification [if applicable]
Identification of Best Offeror	2-7 days after Interviews
Contract Negotiations	2-6 weeks after Identification of Best Offeror
AWARD DATE	1 day

Note for scenarios below:
Public Policy states that the Solicitation must be advertised for a minimum of 4-weeks

Workshop Requirements

1. **Go into breakout rooms**

2. **Prepare the schedule (<u>one scenario at a time</u>)**

3. **If you have concerns about the schedule, what are your recommendations to the client?**

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ACTIVITY	TYPICAL DURATION
ADVERTISEMENT PERIOD	4-6 weeks
Pre-Proposal Meeting	1 week after RFP release
Site-Walk	Same day as Pre-proposal meeting *[if needed]*
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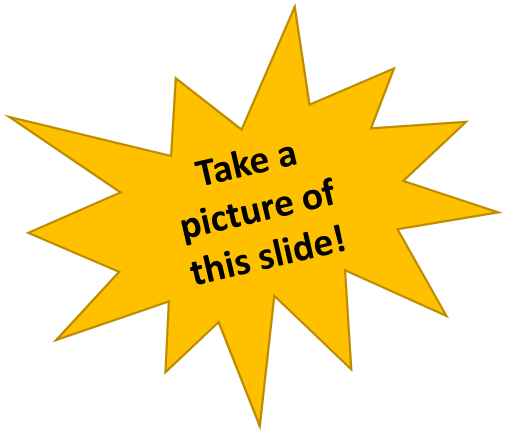
AWARD DATE	1 day



Note for scenarios below:
Public Policy states that the Solicitation must be advertised for a minimum of 4-weeks

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SCENARIO #1

Create a schedule for the following scenario. Consider the General Procurement Guidelines as it relates to the User's constraints (identified below):

Your Client/End User has contacted you about a project that they need awarded. Today's date is January 1. The User would like to hire an electrical contractor to upgrade lighting throughout a building. This is a fairly simple and straightforward project (not a lot of risk). The anticipated size of the work is about $100,000. The User has already prepared a detailed scope-of-work and is ready to move forward with issuing the RFP Solicitation. The User needs to have the project awarded by March 31st, so the contractor can try to complete the work by end of summer.

ACTIVITY	START	END
ADVERTISEMENT PERIOD		
Pre-Proposal Meeting		
Site-Walk		
Questions Due		
Answers Posted		
Proposal Due Date		
EVALUATION PERIOD		
Proposals Evaluated		
Notification of Shortlist		
Interviews		
Identification of Best Offeror		
Contract Negotiations		
AWARD DATE		

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SCENARIO #2

Create a schedule for the following scenario. Consider the General Procurement Guidelines as it relates to the User's constraints (identified below):

Your Client/End User has contacted you about a project that they need awarded. Today's date is June 2. The User is looking to renew an existing contract for Janitorial Services throughout your 7 buildings. The current contract has been in place for 5-years, and is set to expire on September 15th. So, a new contract must be in place before then. Although this is not a very complex service, it is very critical to get a good team/provider. Also, the anticipated size of the work is about $10 Million, over a 5-year term. The User would like to have this project awarded by the end of August. They will also be taking a 2-week vacation on Aug 3-14 (and will not be able to do any activities during this time period. The User has not drafted their scope of work, but is confident it will be done within the next 3-4 weeks).

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SCENARIO #3

Create a schedule for the following scenario. Consider the General Procurement Guidelines as it relates to the User's constraints (identified below):

Your Client/End User has contacted you about a project that they need awarded. Today's date is October 26. The User is looking to purchase a new software system to replace the Organization's current Human Resources system. This will be a complex upgrade since the current system has been in place for over 10 years and very risky since it also deals with internal payroll and finances. The anticipated size of the work is about $1-$2 Million. The User would like to have this project awarded ASAP since they are concerned that the existing system will no longer be serviceable by January 1. Therefore, this contract must be awarded by the end of the year. The User has a good idea of what they need to include in the scope of work, which should be ready to issue in about 2-weeks.

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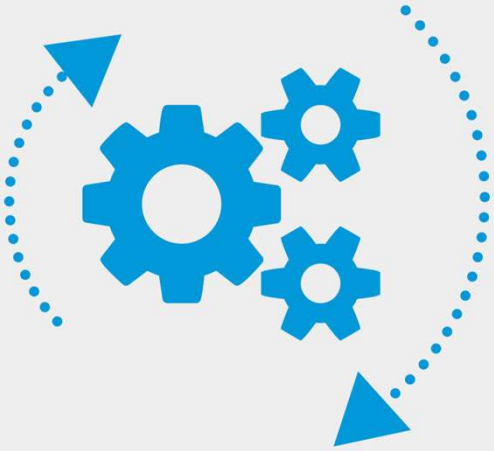
Facilitating the RFP Process

Process vs. People

Although Procurement is primarily about processes and procedures to assist in purchasing a good or service…



time is spent interacting & dealing with

"People Skills"
are among the most important attributes of effective Procurement & Supply Chain Professionals

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Even If 2 Projects Have Exact Same Scope…

Project 1 (Painting)

Exact Same Scope

Project 2 (Painting)

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Very Rarely Will They Ever Be “The Same”

Project 1 (Painting)

Clients / Users

Project 2 (Painting)

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Level Of Effort

The level of effort that a Purchasing Agent will spend is commonly based on the following factors:

1. **Size of the project ($)**
2. **Complexity of the project/scope**
3. **Sensitivity/impact that the project has to the organization**
4. **Urgency of the project**
5. **The Client/User personnel**

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Impacts of Client Personnel

1. Client has never been involved in a procurement
2. Client has limited experience with this type of project/service
3. Client isn't sure what exactly they want
4. Client wants to sole-source
5. Client wants to pick a supplier that they know
6. Client wants to pick a supplier that has worked for organization in the past

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Impacts of Client Personnel

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Can Be Addressed Through Education & Toolkits

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Impacts of Client Personnel

1. Client has never been involved in a procurement
2. Client has limited experience with this type of project/service
3. Client isn't sure what exactly they want
4. **Client wants to sole-source**
5. **Client wants to pick a supplier that they know**
6. **Client wants to pick a supplier that has worked for organization in the past**

Resistive Behaviors That Will Require Greater Attention

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Resistance Behaviors

- **Most people are not intentionally trying to be difficult**

- **Many are resistive due to fear of change or fear that the outcome of the project/service will impact their work personally.**

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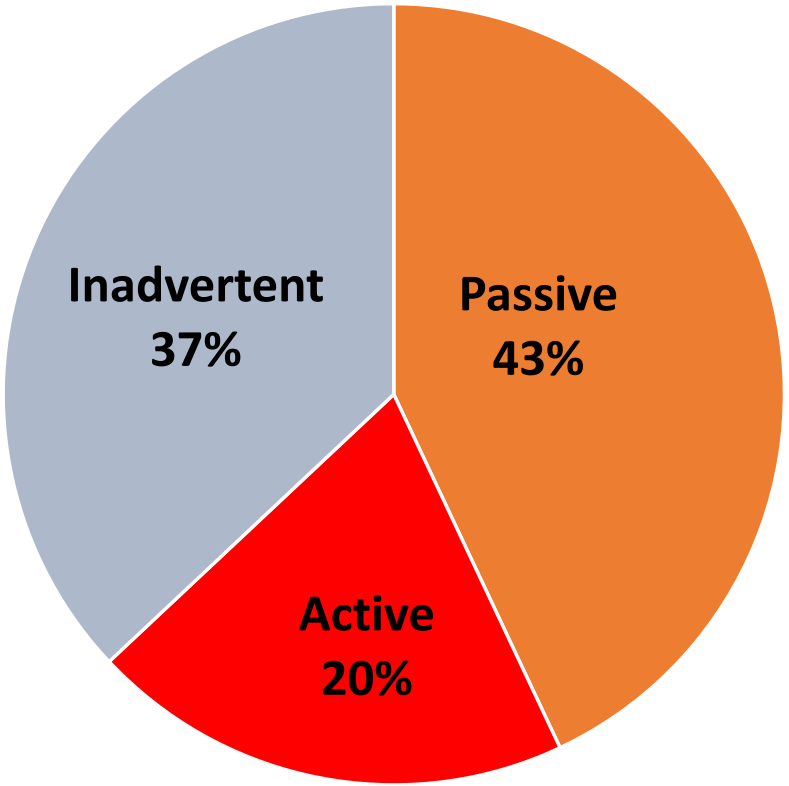
Resistance

Top 5 Resistance Behaviors

1. Reversion
2. Reluctant Compliance
3. Arguing
4. Lack of Transparency
5. Delaying



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Ask Yourself…

…Is the Client looking to sole source or pick a supplier just because they want to increase the risk of a procurement protest?

4. **Client wants to sole-source**
5. **Client wants to pick a supplier that they know**
6. **Client wants to pick a supplier that has worked for organization in the past**

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Ask Yourself…

…Is the Client looking to sole source or pick a supplier just because they want to make your life more difficult?

4. **Client wants to sole-source**
5. **Client wants to pick a supplier that they know**
6. **Client wants to pick a supplier that has worked for organization in the past**

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Why Is The Client Asking For This?

Could it be because the Client doesn't think they have time to run a full procurement?

4. **Client wants to sole-source**
5. **Client wants to pick a supplier that they know**
6. **Client wants to pick a supplier that has worked for organization in the past**

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Why Is The Client Asking For This?

Could it be because the Client has personally had bad experience with Suppliers in the past, and doesn't want to stuck again with a low performing Supplier again

4. **Client wants to sole-source**
5. **Client wants to pick a supplier that they know**
6. **Client wants to pick a supplier that has worked for organization in the past**

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Why Is The Client Asking For This?

Could it be because the Client has personally invested a lot of time gathering information about products/suppliers and believes that they know what the best product/supplier is?

4. **Client wants to sole-source**
5. **Client wants to pick a supplier that they know**
6. **Client wants to pick a supplier that has worked for organization in the past**

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Why Is The Client Asking For This?

There are many "valid" reasons why the Client believes that they know best…

4. **Client wants to sole-source**
5. **Client wants to pick a supplier that they know**
6. **Client wants to pick a supplier that has worked for organization in the past**

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Why Is The Client Asking For This?

There are many "valid" reasons why the Client believes that they know best…but that is why the Purchasing Agent is so important to the Organization!

4. **Client wants to sole-source**
5. **Client wants to pick a supplier that they know**
6. **Client wants to pick a supplier that has worked for organization in the past**

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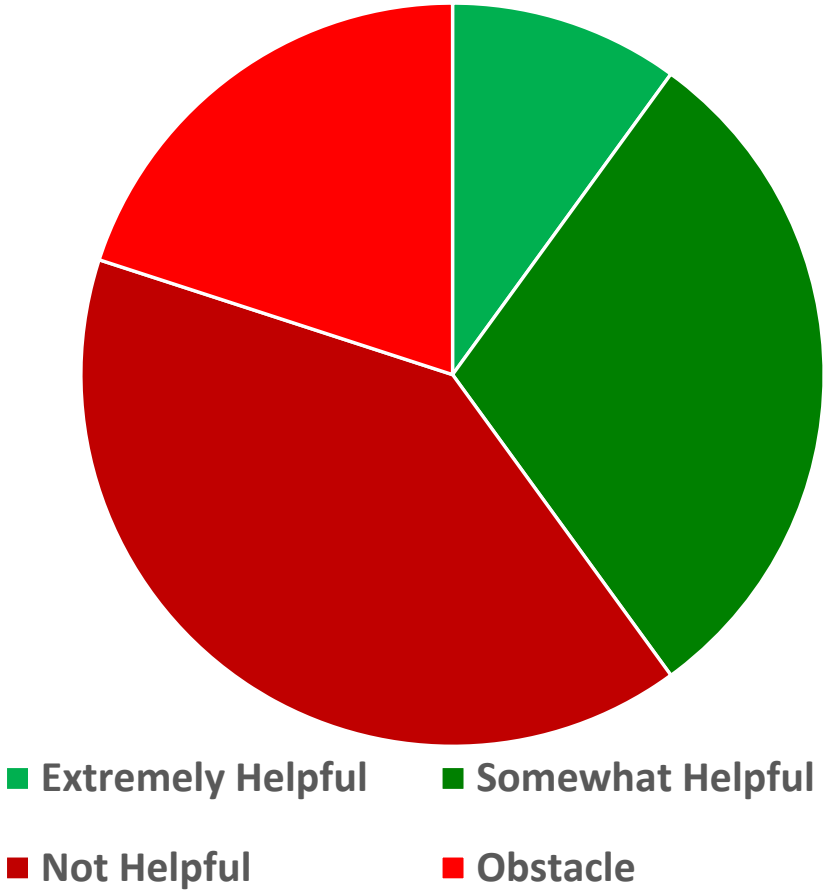
How Can Procurement & Supply Chain Help?

Step 1) Understand Potential Perceptions

Research has shown:

- **40%** view procurement as "helpful"
- **60%** view procurement as "not helpful" or "obstacle"



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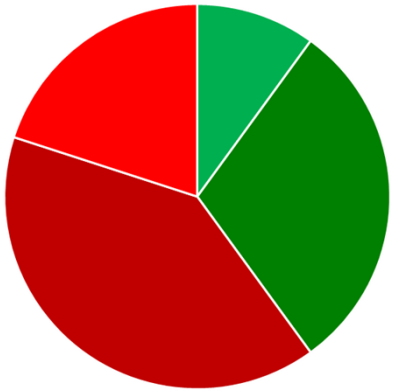
Why Do Some View "Procurement" As An Obstacle?

- Some think that procurement "slows things down"
- Some have had bad experiences in the past.
- Most may not understand the true value that procurement can bring/add to directly improve their project results.
- Some view procurement as bureaucracy or a checkpoint they have to "get through" before they can "get back to the project"



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Step 2: Listen To What They Are Saying

- Let the client share their thoughts, concerns, and current project info.
- Have them layout their strategic plan & tactical schedule
- Do not just tell them “no” or “we can’t do that” (even if they are asking for something that can’t be done)…
  - Propose/suggest alternatives that can meet their objectives (and meet procurement policies) … Remember, you are a problem solver!
- Don’t feel forced to answer a question that you are not 100% confident with
  - It is OK to say: “That is a good question! Let me check with my team and I’ll get back to you later today/this week”

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3) Emphasize the importance of the Project Outcome

- Market Research
- Statement of Work
- Expert Vendor (Team)
- Opportunity for Innovation
- Price Competition
- Apples-to-Apples Comparisons
- Avoid Change Orders
- Etc.

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Step 4) Act as a Facilitator

Procurement & Supply Chain

Business Partner / User

Guide & Assist their Business Partners!

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Step 4) Act as a Facilitator

- **Remember, for your Business Partners, the procurement process can be:**
  - **New**
  - **Unfamiliar**
  - **More complex than expected**
  - **Overwhelming**
  - **Disorienting**
  - **Etc.**

A simple 30-60 minute "step-by-step walk-through" can help them understand that you have a plan to address their major concerns

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Pre-Planning Activities

Project Lifecycle

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2) Selection Phase

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2) Selection Phase

TOO LATE!

In Many Cases, Procurement Is Engaged Right When The Client Is Ready To Advertise

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1) Planning Phase

Procurement Must Be Engaged During The "Planning" Phase!

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Focus On Big Picture

- Try to focus on the bid-picture goals/needs of the client
- Avoid “diving into the weeds”
- Purpose is to determine:
  - Urgency (approvals, current constraints)
  - Solicitation Type (price only vs overall value)
  - Confidence Level (do we need additional tools to help support)

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Toolkit

PROJECT BACKGROUND INFORMATION

This section is to help Procurement understand project parameters & plan for the optimal procurement process.

1) **PROCUREMENT TYPE:** Which of the following best describes this project?
   - ☐ Renewal/Upgrade: This procurement will be to renew or upgrade an existing product or service
   - ☐ New: This procurement will be to contract to a new product or service

2) **CATEGORY:** Which of the following best describes this project?
   - ☐ Software or IT
   - ☐ Skill Development (Education, Training, Coaching)
   - ☐ Assessment/Analysis (Technology/Engineering/Data)
   - ☐ Assessment/Analysis (Business/Operational)
   - ☐ Facilities Operations & Maintenance
   - ☐ Facilities Construction & Renovation
   - ☐ Professional Services / Consulting
   - ☐ Long-Term Service Providor
   - ☐ Other (please describe): _____

3) **DESCRIPTION:** Provide a high-level overview of what you are looking to procure

   Provide brief narrative (1-3 sentences maximum)

4) **PREFERRED PATHWAY:** Identify the preferred solicitation approach
   - ☐ Sole source to the current bidder/product
   - ☐ Sole source to a new bidder/product
   - ☐ Go to market and select the best-available bidder/product
   - ☐ Unsure

5) **COMPETITION:** If you are not looking to 'sole-source' this contract, can you identify how many bidders you believe can reasonably meet the minimum requirements (this can be your best guess)
   - ☐ Unsure
   - ☐ Only 1
   - ☐ 2-4
   - ☐ 5-7
   - ☐ 8-10
   - ☐ 11 or more

6) **CONTRACT EXPECTATIONS:** Identify how many contracts are expected to be signed for this project:
   - ☐ 1 Contract (plan to select to 1 single bidder to provide everything we need)
   - ☐ More than 1 Contract (we need multiple different bidders to handle different parts of the scope)
   - ☐ Unsure (we need more information)

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PROJECT BACKGROUND INFORMATION

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7) **CRITICAL TIMELINES:** Identify any critical dates that are important for this project (identify all that apply)

Date the current Contract expires (put 'N/A' if not applicable):	DD-MM-YYYY
Date the new Contract needs to be signed by (put 'N/A' if not applicable):	DD-MM-YYYY
For software/IT project: Targeted Date for "Go-Live" (put 'N/A' if not applicable):	DD-MM-YYYY

Insert any additional dates that are important for this project/service:

ITEM	DESCRIPTION	DATE
#1	Insert brief description of the information (1-sentence)	DD-MM-YYYY
#2	Insert brief description of the information (1-sentence)	DD-MM-YYYY
#3	Insert brief description of the information (1-sentence)	DD-MM-YYYY

8) **ANTICIPATED BUDGET:** Identify your financial expectations:

Do you have an approved/allocated budget?	□Yes | □No
If 'Yes', what is your total budget for this project:	$$$,$$$
If 'No' identify the anticipated spend of this project (best guess is fine!)	$$$,$$$

What was the basis of how this budget/estimate was set?

□ Historic Spend □ Market Research □ Consultant Feedback □ Other □ Unsure

If this project/service has been procured before in the past (at W&R), what was the total cost of the previous implementation (final cost not contracted cost)	$$$,$$$

For Software & IT Procurements, please identify the budget for the initial implementation versus the annual reoccurring costs:

Budget for implementation	$$$,$$$
Budget for annual reoccurring costs (licensing, support, maintenance, etc.)	$$$,$$$

Identify your level of 'confidence' that your approved budget can deliver your needs?

Low Confidence *(Budget will not meet all of our needs)* — High Confidence *(Budget will be more than enough to meet our needs)*

0	1	2	3	4	5	6	7	8	9	10
□	□	□	□	□	□	□	□	□	□	□

9) **CONTRACT TERM:** Identify the expected term of this contract.

Will this Contract have a term limit?	□Yes | □No | □Unsure
If yes: What is the expected 'initial' term of the contract?	## Years
If yes: Will there be options to renew?	□Yes | □No | □Unsure
If yes: what is the 'total' term of the contract including all renewals?	## Years

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PROJECT BACKGROUND INFORMATION

This section is to help Procurement understand project parameters & plan for the optimal procurement process.

10) CORE TEAM:

Have you established a 'core' project team that will serve as subject matter experts and/or evaluators during the procurement process?	□Yes | □No | □Partially
Briefly list the core team members / departments here: • Insert • Insert • insert	

11) EXPERIENCE: Provide the following:

How many times has W&R procured this type of product/service in the past 3 years?	#
How many times have you procured this product/service in the past 3 years?	#
How many times has your core team procured this product/service in the past 3 years?	#

If this service has been procured before in the past at W&R, what has been the overall level of performance of this service. Please rate on a 0-10 scale as defined below:

0=Low Performance / Satisfaction
Project had significant quality issues
Project had significant cost increases
Project was completed later than expected

High Performance / Satisfaction=10
Project had no quality issues
Project had no cost increases
Project was completed on-time

0	1	2	3	4	5	6	7	8	9	10
□	□	□	□	□	□	□	□	□	□	□

What is your level of 'confidence' that you and your core team will know exactly what information bidders will need to see in the Scope of Work to generate an accurate cost proposal?

Low Confidence
(Not sure what bidders need)

High Confidence
(Know exactly what bidders need to see)

0	1	2	3	4	5	6	7	8	9	10
□	□	□	□	□	□	□	□	□	□	□

12) OTHER: Identify any other critical information that Procurement should be made aware of (if any).

Insert as applicable

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Confidence Levels

Identify you level of 'confidence' that your approved budget can deliver your needs?

Low Confidence *(Budget will not meet all of our needs)* — High Confidence *(Budget will be more than enough to meet our needs)*

0	1	2	3	4	5	6	7	8	9	10
☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

What is your level of 'confidence' that you and your core team will know exactly what information bidders will need to see in the Scope of Work to generate an accurate cost proposal?

Low Confidence *(Not sure what bidders need)* — High Confidence *(Know exactly what bidders need to see)*

0	1	2	3	4	5	6	7	8	9	10
☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

9) **LEVEL OF CONFIDENCE:** Identify your overall level of confidence as it relates to the Scope of Work or Future State. On a 0-10 Scale, identify your level of confidence that you know exactly what information bidders will need in the Scope-of-Work to accurately price & propose on this project.

Low Confidence *(Not sure what bidders need)* — High Confidence *(Know exactly what bidders need to see)*

0	1	2	3	4	5	6	7	8	9	10
☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

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