



Dear Proposal Writer...

Dear RFP Writer...

Dialogue on Successes and Failures of the
Request for Proposal Process

Simon Roy, Goss Gilroy Inc.

Shelley Borys, Citizenship and Immigration Canada

Benoît Gauthier, Circum Network Inc.

Stephen Kester, Foreign Affairs and International Trade Canada

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The RFP Process: Principles

	Purchaser Perspective	Vendor Perspective
Objectives of the RFP process	To select the best possible vendor at the lowest possible price	To obtain an interesting, doable assignment where a profit can be produced
What is a success?	<ul style="list-style-type: none">• Enough proposals• Clear proposals• Low selection cost (<i>t</i> & \$)• Justifiable decision	<ul style="list-style-type: none">• Opportunity to shine• Realistic project• Winning• Solid purchaser analysis
What is a failure?	<ul style="list-style-type: none">• No bidder• Too many bidders• Disagreement on selection• Vendor does not deliver	<ul style="list-style-type: none">• Cannot offer value-added• Misunderstandings• Loss for trivial reasons• Winner balloon-prices

Benoît: the good and the bad

Area	Emphasize...	Avoid...
Study Objectives	clarification... to benefit from vendor's creativity	simply stating tasks without purposes
Purchaser Expectations	clarification... so that proposals deal with the same project	leaving it all to vendor's suggestions
Risk Sharing	clarifications... does the vendor bear all the risks?	contradiction: fixed price but variable requirements
Value/price	specification of a price range or an expected level of effort	leaving it entirely to market competition (we don't sell pencils; and even pencils...)
Time table	a realistic time table building in obvious delays	painting the vendor in an ethical corner to be responsive

Benoît: the good and the bad

Area	Emphasize...	Avoid...
Intellectual property	consideration of vendors as researchers, protection of moral rights	sharing proposals, implicitly attributing changes to the consultant, ghost writers
Number of invitations	suitability to the value of the work	cattle call
Skills	use of general CE criteria	over-emphasis on subject matter expertise
Duration of posting	suitability to the value of the work	overly short and overly long
Ultimate criterion	highest points within price	lowest price qualified

Benoît: at the macro level

- "All I have to do is dream, dream, dream, dream, dream" (Roy Orbison)
- Process must cost less than it saves
 - 5 x \$5,000 proposals cannot save \$25,000 on a \$50,000 project
- Proposal cost reflected in actual prices
 - All benefit from cheaper RFP process
- Promote quality, not mediocrity
 - Low quality has hidden costs

Simon: best RFPs

- Mutually exclusive sections: instructions for bidders, TORs: background, program description, objectives of project, methodology, mandatories, scoring grid/selection approach, certificates. All “musts” in instructions and mandatories sections
- Detailed info on programs – especially numbers (financial, outputs, clients, etc.). These are key determinants of method design and costing
- “Open door policy” when it comes to methodology (reflected in scoring grid)
- Ratings based on experience, methodology and background knowledge. Multiple criteria increase risk of inappropriate weighting between criteria.
- Realistic timelines – including realistic project authority review time of deliverables

Simon: problematic RFPs

- Prescriptive RFPs, that determine all parameters of methodology – especially if writer did not do homework or lacks experience.
- Tight budgets that prescribe methodologies
- Prescriptive RFP that give points to “innovative approaches” – what does “innovative” mean?
- Expected response rates on surveys
- RFPs that impose a numbering system (“same as RFP”)
- Imposed maximum pages – We need at least 2 pages per method, more if there is primary quantitative data collection. 10 pages not enough for 100K project...
- “Tests” that lead to subjective scoring (e.g., identify potential challenges – looking for quantity or quality?)
- RFPs that assume that consultants will work full-time for the client (compare timelines of project with number of days of consultants in project...)

Simon: secret messaging?

- Consultants shy away when:
 - Quick turnaround time (wired?)
 - 10 page maximum proposal (wired?)
 - Another consultant did the framework
 - RFPs sent during holiday season (consultants have a life too...)
 - Consultants excluded from instrument design – high risk factor

Shelley: context

- Although the bid review teams are comprised largely of evaluation staff (with program representation), the bid review process is managed by the department's procurement offices. Evaluation staff therefore have limited flexibility in terms of rating criteria and associated points.
- Bid review teams meet beforehand to clarify key points to look for; this improves our inter-rater reliability.
- Bidders on a proposal were previously invited to give an oral presentation. This allowed for further elaboration of how the bidder would approach the work, and also allowed the reviewer to assess the bidder's competencies in person. However, due to efficiency pressures and guidance from the departmental procurement office, this practice has become less prevalent in recent years.
- Requests For Proposals (RFPs) have become much clearer and more specific over time, and the quality of submitted proposals has also improved. On the whole, this is good, but it also makes it harder to distinguish between bids.

Shelley: boilerplate

- The re-use of material between proposals is understandable in many instances. However, in other cases it is problematic:
 - Material referring to the wrong proposal cast doubt on the bidder's quality assurance skills;
 - Large degrees of recycling cast doubt on the bidder's engagement with the project; and
 - The re-use of previously written material creates a disconnect between the (quality of the) proposal and the work that will be performed.
 - Consider minimizing the re-use of material, particularly in sections devoted to the specific work proposed.

Shelley: clarity

- Make sure all the requirements are met, and make it easy for the reviewer to verify this.
 - Consider including a table cross-walking criteria to page numbers; and
 - Consider identifying, early in the document, how pass/fail requirements are met.
- Ensure that spelling, grammatical, and formatting errors are caught.
 - Consider having a peer perform a “fresh eyes” review.
- Strive for clarity through brevity.
 - Minimize the degree of superfluous information (e.g., long history of firm);
 - Consider using summary sections to recap key information; and
 - Consider using tables, charts, or graphs to supplement the narrative discussion.

Shelley: team

- Some firms have confirmed that proposals are written by dedicated proposal-writers, rather than members of the prospective evaluation team. This reduces the degree to which the proposal can be used as a proxy indicator of the quality of the eventual report and the contribution of team members.
 - Consider ensuring greater congruence between the two sets of authors, or indicating clearly where separate talent has been engaged for the writing of the proposal.
- Some proposals overstate the degree to which senior team members will be involved, relative to their later involvement in the evaluation itself. Over time, this reduces trust in the proposals submitted by firms.
 - Consider providing a clear outline of the planned level of effort by team member (ranked by seniority, aligned to the different components of the work), to facilitate the subsequent monitoring of planned involvement levels.

Shelley: value-added

- The degree to which technical considerations are met by a proposal is weighted far more heavily than the proposed bid value (as long as it is within the maximum).
 - Showing how these considerations are met is important.
- Bidders can distinguish themselves by showing the value added by engaging the specific firm:
 - Expand on the stated requirements by linking the requirement to how it will be met, and what purpose this will serve.
 - Show that the methodology has been thought through by suggesting approaches that possess a clear rationale, are relevant to the project at hand, and are feasible to implement.
 - Since much of the methodology is mapped out in the RFP, the ability to propose ideas for the remaining portion is a strong indicator of value-added.

Stephen: context

- **Expired Standing Offer**
 - More use of limited competition (under NAFTA threshold), sole source; limited use of MERX, OGD SOs and PWGSC Supply Arrangements
- **Standard Bid Requirements**
 - Experience of the Firm and Individuals, Past Relevant Projects, Methodology, Understanding of the Project, Budget
- **Changing Need for Consultants**
 - Contracting for specific needs for a larger evaluation study (survey, case study, specialized report)
 - Hybrid model
 - Specialized expertise for areas being evaluated

Stephen: proposal writer do's

- Make it easy for the bid reviewer to identify how you meet the mandatory and technical requirements
 - Summary page
 - Clear and organized proposal
- Use the CV Template Provided or Standard CV templates for Proposed Individuals
 - Revise CVs to match proposal requirements
- Align proposed methodology to program and issues being evaluated
 - Add value by proposing different ideas/approaches
 - Use best practices identified from similar evaluations
 - Spell out assumptions/risks
 - Justify use of methodologies, ie. surveys, field missions
- Match the LOE of Principles and SMEs to the methodology proposed

Stephen: proposal writer dont's

- Repeat the SOW to show you know the context
- Forget to include any and all mandatory requirements
- Try to fit a square peg in a round hole
 - Relevant projects and experience
- Don't fish when asking questions
- Don't provide options for methodologies or costing

Stephen: towards an improved relationship/partnership?

- Provide greater access to original material and documents
- Clearer expectations of what is required
 - More use of bidders' conferences?
- Improved planning and timing of evaluations

Conclusion: same boat

Risks for purchaser

- Long review process (long proposals)
- Exceeding the budget
- Selecting a vendor who oversold or did not understand the task

Risks for vendor

- Losing work for technical / trivial reasons
- Excessive net costs developing proposals
- Getting work without full understanding of ramifications

Improvements in RFPs

- Clarity and completeness of information
- Adequate risk sharing
- Recognition of consultant's expertise
- Realistic timelines
- Maximum budget statements

Improvements in proposals

- Clarity and brevity
- Original materials
- Quality control
- Value-added
- Realistic promises (person-day allocation, time table, methodologies)