Perspectives

- **Owner:**
  - “Process” and “end-result” objectives
  - Results are subject to public scrutiny

- **Bidder:**
  - Fair process
  - Reasonable “biddable” requirements
  - Reasonable chance of success

- **RFP’s that cover a broad range of services and infrastructure:**
  - Outsourced property / facilities management services, design-build, P3’s, technology, other services
  - Encouraging innovation is always a challenge
Developing RFI/RFP Documents

- “Garbage in, garbage out”
- Consult with the supplier community if necessary
- Spend the time that is needed to produce comprehensive documents:
  - Incomplete documents generate a lot of questions – add delays to the process
  - Leaves a poor impression with the bidder community
  - Generates submissions that cannot be evaluated
- Develop the evaluation framework and criteria before the documents are released

Evaluation

- Be clear about the objectives:
  - Process objectives – avoid runaway process driven logic that drive a “garbage” result
  - End-result objectives – balance of public policy, financial, functional, common sense results; large number of stakeholders add complexity (incompatible objectives); often not clear
- Innovation can be difficult to evaluate:
  - By definition, you don’t know what you will get and therefore it is difficult to construct evaluation criteria
Evaluation

- Setting criteria:
  - Balance process and fairness objectives with flexibility
  - Use scenario analysis to understand what you might get
  - Multi-step evaluation and use of hurdles provide flexibility
- Normalizing bids:
  - “Apples and apples”
  - Clustering is positive
  - Intangibles
  - Financial modeling and deal valuation - can get complex when scope includes complex service contracts and termination options

Encouraging Innovation

- Multiple step processes
- Fix the smallest number of variables at each step
- Evaluation: “Hurdles”
- Process flexibility