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Sourcewell

When it comes to procuring vendors and services for your municipality's projects, Requests for Proposals (RFPs) are standard practice, and to a degree, for good reason.

Besides providing a familiar format for submission, RFPs also help create comprehensive criteria for the project, qualify and provide equal opportunity to applicants, present a clear snapshot of the market, and most importantly, create trust and transparency between vendors, your municipality, and its constituents.

Unfortunately, every step of actually creating a Request for Proposal is rife with complications and inefficiencies of its own. That means instead of focusing directly on the problem your

municipality is trying to address, you have to shift your efforts into solving process obstacles first.

While that isn't uncommon to complex procedures, it can further hinder your ability to find a timely solution – which is especially important when you're facing a pressing issue that grows more difficult to solve by the day.

There is, however, a way to shortcut the entire process, but to truly understand how it works and why it's necessary, we first need to look at the issues inherent to RFP procedure.

Common Pain Points of RFP Process

Laborious Drafting Requirements and Administrative Redundancy

When it comes to actually drafting a Request for Proposal, most of the preliminary work comes from collecting and organizing information – the kind of raw administrative work that, often justifiably, tends to eat up a lot of time. Considering most offices often produce well over 50 RFPs a year for any number of municipal needs, many of which include similar information, one can easily see the kind of redundancy created by this process, and yet very little can be cross-functionally applied.

For example, regardless of the RFP, you'll need to supply appropriate forms, requirements, and terms to applicants so they clearly understand the request and comply with contractual obligations. Although any number of those criteria may have been included in past requests, based on project differences, they will likely still require levels of specificity.

This can include but isn't limited to:

- o An agreement form;
- o Compliance and registration information for out-of-state bidders;
- o Bidder qualification criteria;
- o Information on contract or proposal interpretation;
- o Proposal submission instructions and criteria (understanding the city's requirements, approach and work plans, project team and firm experience and qualifications, references, proposal costs, hourly rates, and cost savings/reduction);
- o Terms for addenda, price adjustments, and multi-year bids;
- o Terms for payments, extensions, and delays;
- o Terms for acceptance, rejection, bidding errors, withdrawals, and collusion;
- o Terms for supplies/services, warranties/guarantees, defects, and subcontracting;
- o Terms for indemnification, liability, and insurance;
- o Terms for handling of proprietary information, release of information, and patents and royalties;
- o Terms for brokering.

Of course, none of this even addresses the primary purpose of the request.

In addition to terms and requirements, you also need to properly communicate the project details so bidders have a full understanding of

the five W's – who, what, when, where, and why. This, of course, is another step fraught with inefficiency, often requiring reviewing relevant resources and coordinating disparate parties and pieces of information.

That means rounding up, defining, and presenting project specifications, including:

- o An overview and/or project description;
- o A statement of intent/purpose;
- o A profile complete with project boundaries;
- o A scope of services;
- o A list of parties needed for project consultation;
- o Details of the evaluation process;
- o A detailed description of the award criteria;
- o Requirements for regulations and plans/ diagrams;
- o A proposed project schedule;
- o Expected deliverables;
- o Proposed progress meetings;
- o Detailed responsibilities to be upheld by the municipality;
- o A compensation structure.

Between collecting, organizing, and drafting necessary project information, there are more than enough opportunities for hangups and

inefficiencies that can protract the process of making bids, landing deals, and providing solutions to your organization.

Developing Scoring Systems and Conducting Evaluations

Outside of collecting information and drafting the RFP itself, developing scoring systems, conducting evaluations, and making a selection are easily the next most time-consuming steps.

If thorough during the drafting stage, scoring criteria may have already been created and outlined in your RFP. However, not every team prefers or has the time to generate and fully disclose the specifics of their intended scoring system and may simply stick to general award categories in their request.

Regardless of approach, it's rarely quick and easy, taking mutual buy-in from all parties on the evaluation team to determine priorities and create a system that appropriately scores submissions in a way that will best suit the project.

Before even reaching the scoring and evaluation process, however, an additional round of outreach may be required, as it's often necessary to follow up after proposals

have been submitted with clarifying questions so all proposals can be judged equally – another step that tends to cause delays, as do any physical or virtual presentations you may be curating, or references you need to review.

Beyond spending time establishing a proper scoring system – whether it's basic, weighted, single-category priority or anything in between – evaluation itself often takes a measure of charting. While some categories may be easily comparable, such as proposed timelines or costs, many others are not, requiring someone on the team to take the time to best standardize information across proposals so they can be appropriately evaluated. Then, of course, you still have to make a selection.

In the end, even with a well-defined scoring system developed in the drafting stage, there are still plenty of complications that can arise and further slow down an already lengthy process.

Completing the Contract

Even after you've made your choice about the vendor that best suits your project's needs, the work isn't entirely over – selection, after all, isn't a binding contract. To get pen to paper, you still need to negotiate.

If you're lucky, the terms included in the chosen proposal will be close enough to be mutually agreed upon with just a few small changes, but many contracts simply aren't that easy, requiring a fair amount of back and forth to reach a final agreement.

That means coming to terms on project scope, deliverables, timetables, compensation and payment schedule, and other influential factors – and investing the time doing it.

Now that we've covered the onerous steps of organizing and drafting a Request for Proposal, evaluating submissions, selecting a vendor, and finalizing the contract, we can now take a look at the solution that helps shortcut the entire process: Sourcewell.

The Sourcewell Solution

How It Works

Sourcewell is a self-sustaining government organization that operates as its own cooperative purchasing lead agency. Sourcewell is governed by an eight-member board of directors made up of local elected officials including county commissioners, city council members, mayors, and school board members.

Sourcewell offers publicly solicited contracts to government entities nationwide in an effort to shorten the RFP process and empower community success. In short, it allows municipalities to "piggyback" on contracts previously established between government entities and vendors to satisfy their project's needs while saving them time, money, and other resources.

To put it into context, let's say City XYZ wants to tender a bid for services to overhaul their current parking enforcement system.

Here's how Sourcewell helps facilitate that process.

First, Sourcewell identifies the contract need – in this case, the parking enforcement system noted above. They then begin the solicitation process and its evaluation committee evaluates the responses they receive, scores submissions based on the scoring system published in the RFP, and in turn presents its recommendations to the chief procurement officer (CPO) for final review and approval.

Upon approval by the CPO and ratification by the Sourcewell Board of Directors, a contract is awarded to the recommended supplier, and Sourcewell manages the award with the vendor.

Finally, through a Sourcewell membership, members are able to piggyback off that contract and are able to work with vendors to make purchases – all without the hassle of having to go through the entire RFP process themselves.

Benefits of the Sourcewell Solution

There are myriad benefits to taking this route over seeing a traditional RFP through from start to finish.

Since Sourcewell uses a publicly elected board

of directors, there is inherent objectivity, keeping the entire process fair and unbiased.

But of course, there are many benefits to the parties involved beyond this.

Purchasing using Sourcewell

Identify prospect and sell your value

Traditional Bid

- Spec out equipment
- Advertise tender/bid
- Respond to tender/bid
- Tender/bid opening
- Bid evaluation
- Award lowest bidder
- Protest period

P.O. issued

Deliver equipment

Receive payment

Sourcewell Contract

- Done by Sourcewell

P.O. issued

Deliver equipment

Receive payment

Benefits to the Proposal Team

When it comes to time and resources, few parties gain more than the person or team normally tasked with actually drafting a Request for Proposal.

Instead of going through all of the incredibly time-consuming steps of defining the need, organizing information, drafting the document, conducting evaluations, making selections, and completing the contract, all based on various

requirements and specifications for the project, municipality, and vendors, their job is already accomplished by the Lead Public Agency enlisted by Sourcewell.

In addition, Sourcewell also provides responsive customer service to help answer and facilitate contractual questions, so the proposal team is always keenly aware of all details of an impending or current agreement.

Benefits to the Purchaser/Procurement Officer

For the individual purchaser or procurement officer, the regular RFP legwork is already taken care of, saving them the time and responsibility of vetting hundreds of vendors a year. In addition, this process also guarantees end-user fair market pricing based on a national average as well as contracts built around best-value, ensuring the process is both easy and financially advantageous.

Through a free membership to Sourcewell's

website, members are also provided a platform through which procurement team members can not only easily access all necessary RFP and contract documentation, but also review the vendor overview, references, and links to their external resources. While certainly helpful for projects at hand, it's also incredibly beneficial for researching options the municipality plans to address in the future, instead of having to first define projects and issue RFPs to examine potential solutions.

Summary

Although there are many benefits to the Request for Proposal process, there are clearly just as many, if not more, drawbacks, including expending significant time, money, and resources most municipalities simply can't

spare. By adopting the Sourcewell solution for your project's needs, you'll be able to shortcut the process with no loss of potential options and effectively establish an even greater level of transparency and ease.

Contact Us

gtechna USA

2429 Military Rd #300,
Buffalo, NY 14304, USA

Tel: 866-308-2430

gtechna Canada

7075 Place Robert-Joncas,
suite M101 Montreal, Quebec
H4M 2Z2

Tel: 866-308-2430

gtechna.com