

DOCUMENT: ORGANIZATIONAL INTERVIEW – THE RFP PROCESS

PLEASE NOTE THAT WITHOUT COMPLETE CONTACT INFORMATION WE CANNOT INCLUDE YOUR RESULTS. WE MUST BE ABLE TO VERIFY THE INFORMATION. PLEASE READ THE SURVEY CAREFULLY, AS SOME QUESTIONS WILL REFER TO CERTAIN STAGES OF THE PROCESS AND OTHERS WILL REFER TO THE PROCESS AS A WHOLE. PLEASE INCLUDE AS MUCH INFORMATION AS YOU DEEM RELEVANT.

ORGANIZATION:

ADDRESS:

CITY:

PROV/STATE:

POSTAL CODE/ZIP:

CONTACT PHONE:

CONTACT EMAIL:

PARTICIPANT'S NAME:

POSITION / RANK:

SECTION 1.0 - THE FOLLOWING QUESTIONS PERTAIN TO THE RFP PROCESS AS A WHOLE

1. Does your organization make a clear distinction between a proposal, a request for proposal and a tender? If so, what factors delineate the different processes? (It may be easier to provide a definition here)

2. Approximately how many RFP's have been released by your Organization in the last 24 months?

3. Were the RFP's produced in house, by an external party or a combination of the two?

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4. What was the reasoning behind this decision?

5. What input did vendors provide to the RFP document?

6. What is your overall impression about how the RFP process currently works for your organization?

7. What format(s) does your organization use to notify vendors or post RFP's? (IE municipal web site, local news media, RFP service such as Bid Navigator) Please list all that are applicable



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SECTION 2.0 - THE FOLLOWING QUESTIONS PERTAIN TO THE HIGHEST VALUE RFP ISSUED DURING THE LAST 24 MONTHS

1. What was the highest value RFP issued during the 24 month time frame?

2. What was the approx value? (< \$100,000, > \$100,000 & <\$500,000, > \$1,000,000)

3. Was the cycle completed for that RFP (IE was it issued, bid and awarded) or was it abandoned for any reason?

4. If it was abandoned what was the reason?

5. What category did the RFP fall into? (IE municipal infrastructure – roads, sewer, etc / procurement of goods – technology or consumable supplies / building / services / other?)

6. Approximately how much time was required to prepare the RFP? (Include all parties)

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7. How many people worked on the RFP document team?

8. How much time was allowed for vendors to respond to the RFP?

9. Please briefly describe the evaluation process for the RFP?

10. How many vendors were on your short list for the RFP?

11. How did the evaluator(s) feel about the quality of responses? Good / Fair / Poor?

12. What was the reasoning for the response to 13? (IE pricing not within range, good variety of solutions provided, etc)

13. Did the evaluator(s) feel that the response attracted top quality vendors?



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14. Please explain why or why not?

15. Was the pricing of responses within the expectations of the organization?

16. Please explain why or why not?

17. Were there any surprises in the responses? (IE solutions included that were not initially considered, key requirements that could not be met by the vendor, “no bid” responses submitted from what would normally be considered a short list contender) .

18. Were vendors required to attend a product demonstration meeting or a question and answer meeting either prior to bid close or post bid close?

19. Was there any subsequent follow up required from the vendors such as pricing clarification, solution configuration adjustment, specification adjustment, etc?

20. Did the follow up require project implementation time frames to be altered?



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21. Was the contract ultimately awarded as specified in the RFP or were changes required during the negotiations? If so, how extensive were the changes?

22. Did the implementation time frames submitted in the responses match the projected implementation time frames specified by the preparation or evaluation team?

23. What was the approximate shift in implementation time frame? (IE days, weeks or months)?

24. How long did the project take from start (award of contract) to completion?

25. Were there any surprises during the implementation phase? If so, please explain.

26. How long did the RFP process take from release to contract signing?

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27. Was the length of time for the process anticipated? If not, what obstacles were encountered?

28. Does the organization as a whole consider the project a success?

29. Why does the organization feel this way?

30. What criteria were used to determine success or failure of the project?

31. Did the vendor agree with these criteria?

32. Did the vendor help to set or select these criteria?

33. As a whole, how would you describe the entire RFP process?

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34. And finally, did the project finish within budget and time frame? Please indicate how close to budget and how close to the allotted time frame? (Can be expressed as a % or value)



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SECTION 3.0 - THE FOLLOWING QUESTIONS PERTAIN TO THE LOWEST VALUE RFP ISSUED DURING THE LAST 24 MONTHS

1. What was the lowest value RFP issued during the 24 month time frame?

2. What was the approx value? (< \$100,000, > \$100,000 & <\$500,000, > \$1,000,000)

3. Was the cycle completed for that RFP (IE was it issued, bid and awarded) or was it abandoned for any reason?

4. If it was abandoned what was the reason?

5. What category did the RFP fall into? (IE municipal infrastructure – roads, sewer, etc / procurement of goods – technology or consumable supplies / building / services / other?)

6. Approximately how much time was required to prepare the RFP? (Include all parties)

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7. How many people worked on the RFP document team?

8. How much time was allowed for vendors to respond to the RFP?

9. Please briefly describe the evaluation process for the RFP?

10. How many vendors were on your short list for the RFP?

11. How did the evaluator(s) feel about the quality of responses? Good / Fair / Poor?

12. What was the reasoning for the response to 13? (IE pricing not within range, good variety of solutions provided, etc)

13. Did the evaluator(s) feel that the response attracted top quality vendors?

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14. Please explain why or why not?

15. Was the pricing of responses within the expectations of the organization?

16. Please explain why or why not?

17. Were there any surprises in the responses? (IE solutions included that were not initially considered, key requirements that could not be met by the vendor, “no bid” responses submitted from what would normally be considered a short list contender) .

18. Were vendors required to attend a product demonstration meeting or a question and answer meeting either prior to bid close or post bid close?

19. Was there any subsequent follow up required from the vendors such as pricing clarification, solution configuration adjustment, specification adjustment, etc?

20. Did the follow up require project implementation time frames to be altered?



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21. Was the contract ultimately awarded as specified in the RFP or were changes required during the negotiations? If so, how extensive were the changes?

22. Did the implementation time frames submitted in the responses match the projected implementation time frames specified by the preparation or evaluation team?

23. What was the approximate shift in implementation time frame? (IE days, weeks or months)?

24. How long did the project take from start (award of contract) to completion?

25. Were there any surprises during the implementation phase? If so, please explain.

26. How long did the RFP process take from release to contract signing?

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27. Was the length of time for the process anticipated? If not, what obstacles were encountered?

28. Does the organization as a whole consider the project a success?

29. Why does the organization feel this way?

30. What criteria were used to determine success or failure of the project?

31. Did the vendor agree with these criteria?

32. Did the vendor help to set or select these criteria?

33. As a whole, how would you describe the entire RFP process?



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SECTION 4.0 - THIS SECTION OF QUESTIONS REFERS TO THE ENTIRE PROPOSAL PROCESS

35. What improvements in your opinion would make the process even better?

36. Do you have any general comments that have not been covered in the questions this far?

37. Would you like to receive a copy of the white paper when it has been completed? Please provide mailing and/or email information.

Thank you for your participation in this process. With this information we hope to identify some key areas that will provide cost savings for the entire process and provide better value to the agency and municipality as a whole.

If you have any questions or concerns, please feel free to contact us at (905) 852 – 1064 or at info@bhgroup.ca.

Regards,

Holly Barkwell-Holland
Partner