



BRENDA HAGGARD

BRITT AVRIT

THY MERRITT

HOW TO ISSUE A REQUEST FOR PROPOSALS AND EVALUATE RESPONSES

*RFP FOR A
COMPLETE
RETENTION
SCHEDULE
OVERHAUL/
UPDATE*



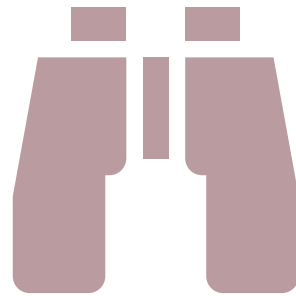
SARATOGA
California

BRITT'S PROCESS



SARATOGA
California

REQUEST EXAMPLES FROM COLLEAGUES AND LIST SERVE



Look for similar desired outcomes or
Agency "style"



Pay attention to verbiage and
requirements in examples received



SARATOGA
California

MEET WITH STAKEHOLDERS



- Who will be impacted?
- Are those impacted champions or potential adversaries/roadblocks?
 - Get their involvement early!



SARATOGA
California

PREPARE AND RELEASE THE RFP

- Prepare the RFP:
 - Ensure agency required verbiage is included
 - Incorporate verbiage from examples
 - Use feedback from those who will be impacted (if applicable)
 - Include a timeline



REVIEW SUBMISSIONS



IS THE RFP PREPARED/SUBMITTED IN
THE MANNER REQUESTED?



ARE THE REQUIRED ELEMENTS MET?



IF USING A COMMITTEE FOR REVIEW,
ENSURE THEY KNOW WHAT THE
EXPECTATIONS AND GOALS ARE



SARATOGA
California

CONDUCT REFERENCE CHECKS

DON'T BE AFRAID TO ASK THE
REFERENCES HARD QUESTIONS!



SARATOGA
California

NEGOTIATE, AWARD/SIGN CONTRACT

- Talk with the preferred vendor!
 - Any potential timing conflicts that have arisen since RFP submission?
 - Solidify deliverables!
 - Ensure the flow of the project is understood on both sides!



OUTCOMES - LESSONS LEARNED



SUCCESS!



Don't overthink it...



Give and accept grace



Ask for time if needed –
don't take advantage



SARATOGA
California

*RFP FOR A
RECORDS
REQUEST
MANAGEMENT
TOOL*



City of
Elk Grove

SCENARIO

Double digit percentage increases in number of requests

“Any and all” type requests

Multiple years of email records.

Impacts from SB1421 and increasing distrust in the conduct of government

No centralized RMS with digitized records

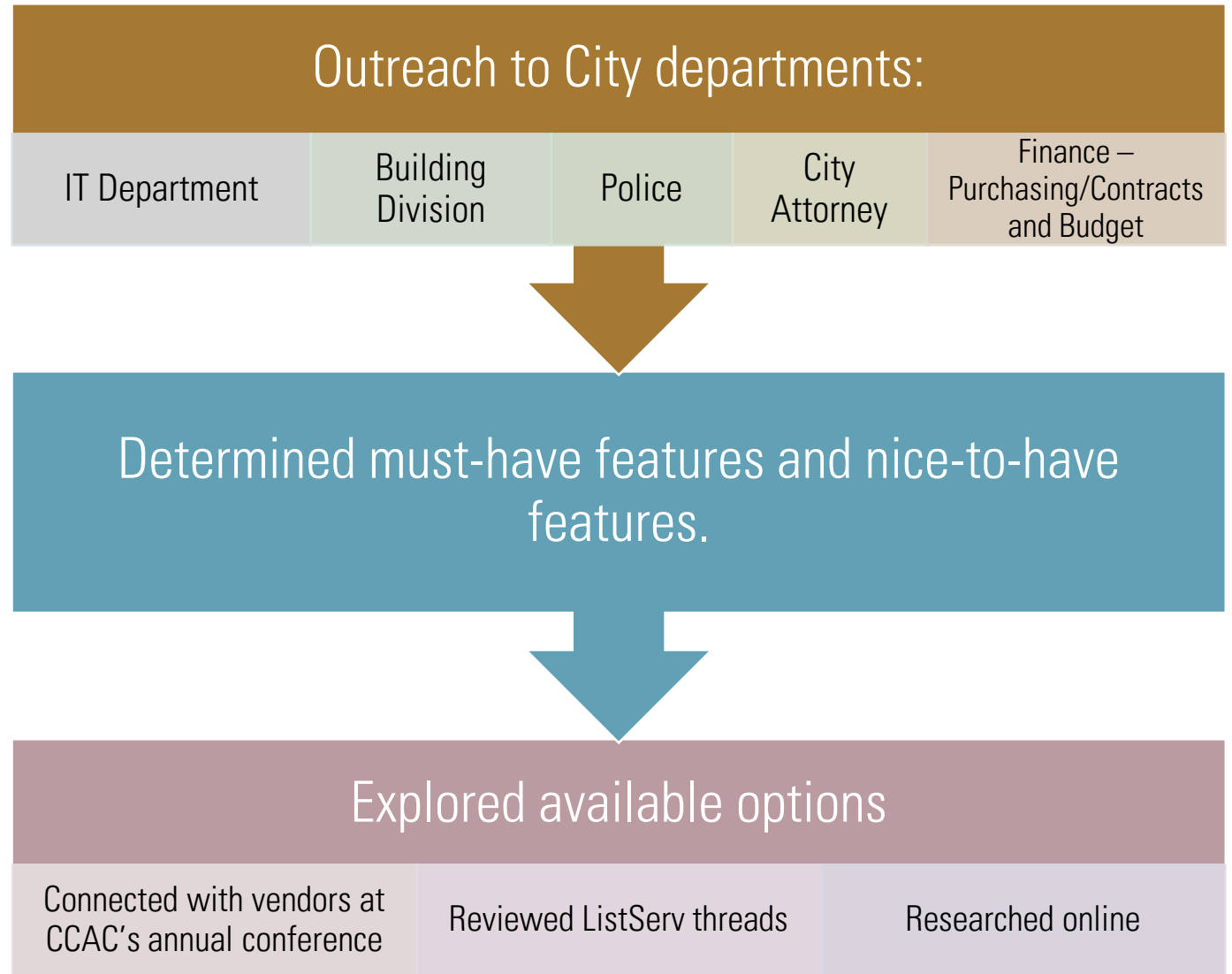
Records had to be gathered from multiple staff who demonstrated various levels of responsiveness

Completely manual process for confirmations of receipt, requests to staff to gather records, 10-day notices to requestors, reminders to staff, and exemption reviews.



City of
Elk Grove

WHAT WE DID...



WHAT WE DID NEXT...



REQUESTED DEMOS FROM
THREE COMPANIES



REQUESTED INFORMAL
QUOTES FROM TWO
COMPANIES



"THAT COSTS A LOT MORE
THAN WE THOUGHT!"



DRAFTED A REQUEST FOR
PROPOSALS BASED ON
ONE RECENTLY DONE FOR
SAAS BY ANOTHER
DEPARTMENT



ELECTED NOT TO PUBLISH
THE RFP SINCE ONE OF
THE COMPANIES
PRESENTED THE OPTION
TO PIGGYBACK ON
ANOTHER GOVERNMENT
AGENCY'S AGREEMENT

WHAT HAPPENED

SUCCESS!— we successfully implemented a records request solution.



WHAT WE WILL DO DIFFERENTLY NEXT TIME...



Establish a timeline with specific milestones for your department and others necessary to successful implementation.



Meet with critics and naysayers to understand their objections



Ask for more time to test or pilot a potential solution.



Set up a series of training sessions with department coordinators to coincide with going live.



Establish regular check-ins with the vendor and staff for the first six to twelve months of the contract term.



City of
Elk Grove



*RFP FOR AN
AGENDA
MANAGEMENT
SYSTEM*

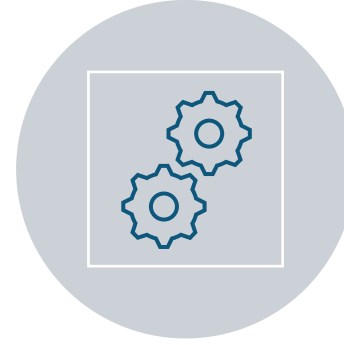
FIRST THINGS FIRST



WHAT IS EXPECTED OF
THE VENDOR



WHAT ARE THE AGENCY
NEEDS



SCOPE OF WORK



BUILD YOUR BID

USING AN ONLINE BIDDING SYSTEM



~~Work Smarter, Not Harder~~

Helps you work a little less hard

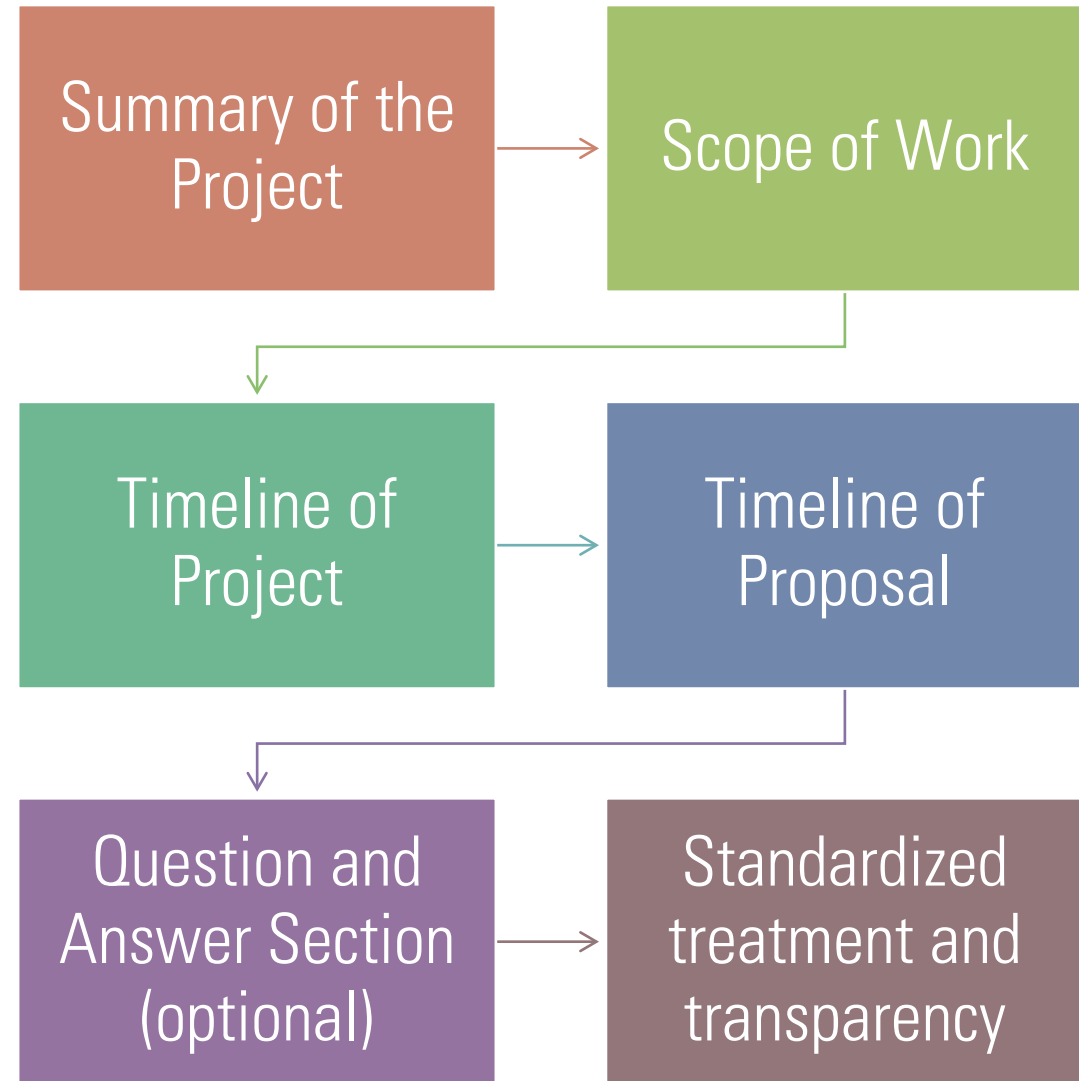


Modernizes Processes



Expands Your Reach

RFP FOR AGENDA MANAGEMENT SYSTEM



EVALUATIVE PROCESS

Evaluation
Committee

Criteria: Did they
meet the scope of
work requirements?

Recommendations
from other agencies

Scoring system for
each category in
your process



AWARD THE CONTRACT



STAY ON TOP OF COSTS



STAY ON TOP OF PROJECT
TIMELINE



"IT AIN'T OVER TILL IT'S
OVER" – LENNY KRAVITZ



QUESTIONS

- Brenda Haggard: bhaggard@elkgrovecity.org
- Britt Avrit : bavrit@saratoga.ca.us
- Thy Merritt : tmerritt@lakeforestca.gov

