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Request For Proposals

Decoding RFP Success

Consultants Insights on Mastering the RFP Process for Effective Project Outcomes



2025 PWOI Conference

Panel Introduction



Patrick Dobbins

- ▶ Public Works Director
- ▶ City of Gonzales
- ▶ 35+ years of experience
- ▶ 30 years with consulting firms



Robert Newman

- ▶ Southern California Municipal Services Director
- ▶ MNS Engineers
- ▶ Multi-service infrastructure consulting
- ▶ 40+ years of experience



Tim D'Zmura

- ▶ President/CEO
- ▶ Annealta Group
- ▶ Management Consulting
- ▶ 30+ years of experience



Jon Blanchard

- ▶ Director of Pacific Region
- ▶ Yeh & Associates
- ▶ Geotechnical Engineer
- ▶ 35+ years of experience

AGENDA

1

The Bad and The Ugly

Common Mistakes, Missteps and Horror Stories

2

The Good

Success Stories and Best Practices

3

Q&A

The Bad & The Ugly

*Common Mistakes,
Missteps, and Horror
Stories*





The Bad and The Ugly

1. What are examples of issues in RFPs that lead to missed opportunities?



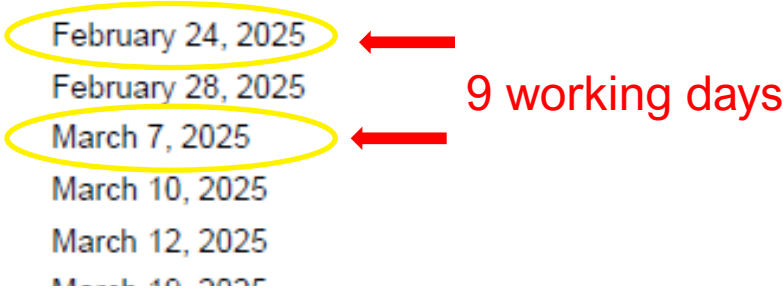
1

Recent Example

V. ANTICIPATED PROPOSAL SCHEDULE

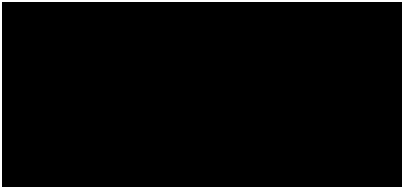
This RFP is subject to the following schedule:

- 1. Issuance of the RFP:
- 2. Last day for questions:
- 3. Deadline for submitting Proposals:
- 4. City Staff review of Proposals:
- 5. City staff selection of qualified Proposer(s)
- 6. Negotiation of PSA, by
- 7. City Council award of PSA, by
- 8. Execution of PSA/issue Notice to Proceed



B. Submittal

Proposers shall submit one (1) hard copy original, in a three-ring binder clearly marked original on the outside cover containing an original "ink" signature. Proposers shall also submit three (3) hard copies in separate three-ring binders, and one (1) separate USB flash drive containing the Proposal in a PDF or Word format to the following address:



Proposals are due no later than 12:00 pm Pacific Time, March 7, 2025. Proposals received after the deadline will not be considered.

1

Recent Example

OVERVIEW

Prospective Consultants:

The [redacted] (City) is seeking proposals from Professional Services Consultants to conduct on-call (as-needed) planning review services as described in detail in the attached Request for Proposal (RFP). The allocation for this contract is expected to be \$150,000 with a City option to extend an additional \$60,000 after July 1, 2026.

Estimated Schedule of Events from Issuance of the RFP to Award of Contract:

Task	Target Date
Release of RFP	February 22, 2025
Questions due on PlanetBids	February 28, 2025
Answers to questions posted on PlanetBids	March 4, 2025
Proposals due at 5:00 pm	March 9, 2025
Interviews by staff/selection of consultant	week of March 17th
Contract Negotiations	Late March
Contract presented to City Council	April 16 or May 6

2 weeks

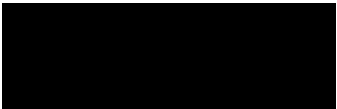
Due on a Sunday?

City Point of Contact:

The sole source of contact regarding this RFP is [redacted] at [redacted]. Individuals or firms interested in submitting a proposal are asked not to contact other members of the City of San Clemente staff or Councilmembers in connection with the RFP prior to the announcement of the consultant selected. Written inquiries related to this RFP are to be submitted confidentially to [redacted], on PlanetBids.

Proposal Closing Date:

The consultant's proposal must be received by the City not later than 5:00 p.m. on March 9, 2024. All proposals must be submitted electronically on PlanetBids. Hard copies are not required, but may be delivered to:



Errors in RFP; re-used old RFP without QC?

Proposals received after 5:00 p.m. on March 9, 2024 will not be accepted. Proposals will become part of the official files of the [redacted] and cannot be returned.

1

The Bad and The Ugly

2. What is an example of an RFP that led to misunderstandings and misalignment of the team selected or project delays?
3. What defines an RFP as going from bad to ugly? What went wrong?

1

Recent Example

VI. RESPONSE TO RFP

A. SUBMITTAL INSTRUCTIONS

It is the responsibility of the Proposer to ensure that any proposals submitted have been uploaded to PlanetBids prior to the RFP due date and time. Proposals, including all required sections and forms, shall be submitted electronically via the City's Bid Management System, PlanetBids. No other form of submittal will be accepted. Additionally, it is a requirement that five (5) hard copy proposals be delivered to the Public Works Agency drop box located on the City Yard Admin Building in the first floor lobby in an enclosed sealed envelope and marked clearly with the following:

← Electronic submittal only
← 5 hard copies

"SEALED PROPOSAL FOR DO NOT OPEN WITH REGULAR MAIL."

Gentle note: staff will not timestamp or sign any hard copy deliveries as the electronic submittal by the deadline will suffice. For further instructions regarding hard copy submission of proposals, refer to PlanetBids.

Best Practices and Success Stories

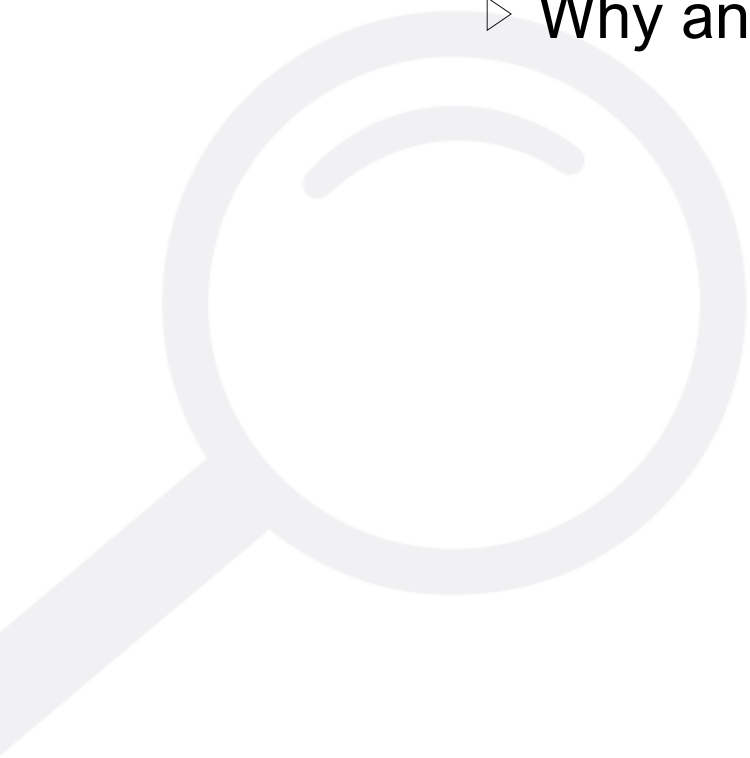


2

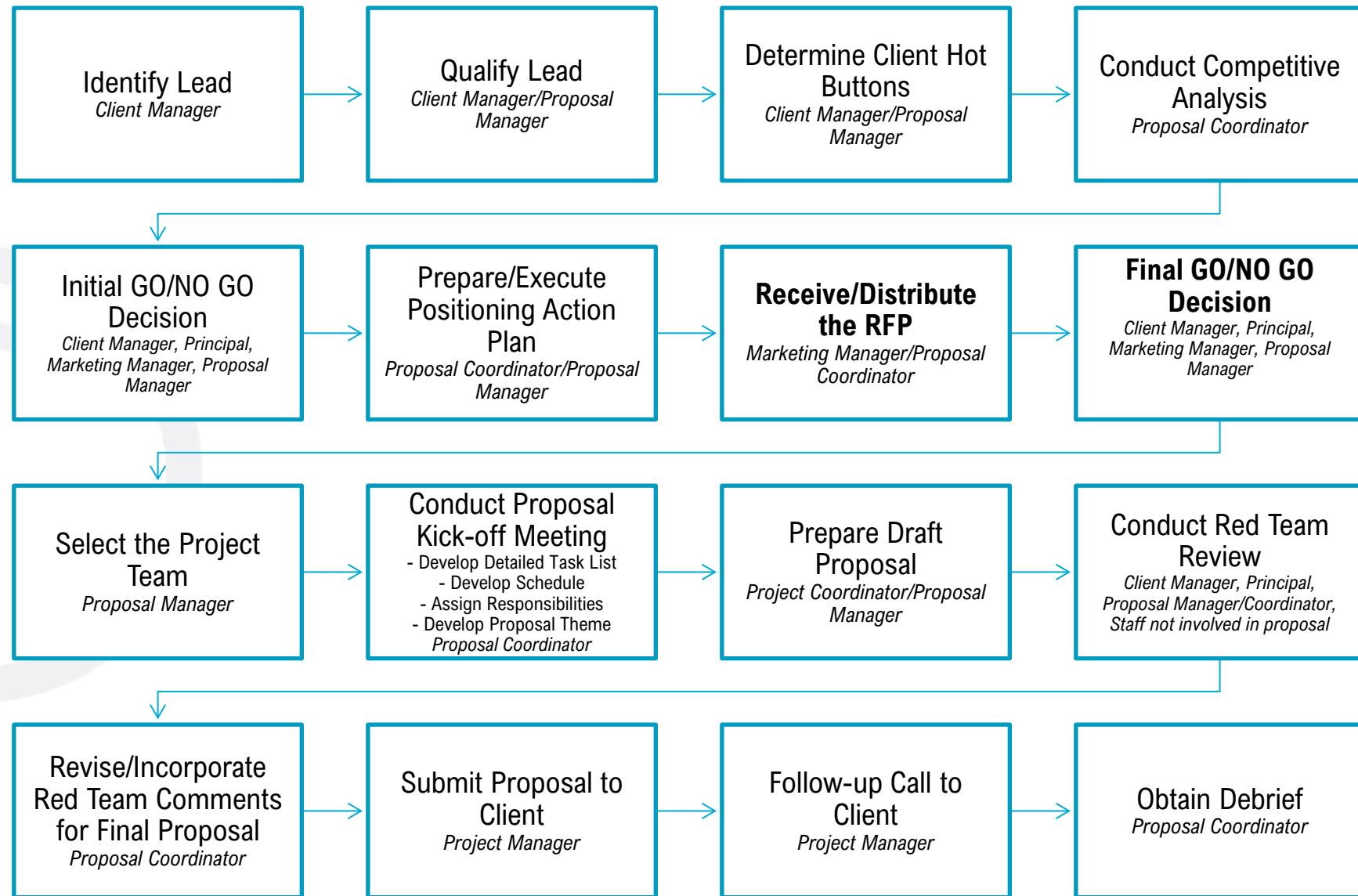
The Good

1. Preparing for RFQ/P

- ▶ Why and how do consultants pre-position for a RFP?



Understanding and Managing the Proposal Process



2

The Good

- ▷ What is the agency's process for releasing an RFP?
- ▷ When and why should an On-Call List (master service agreement) be used?

2. Creating an effective RFQ/P

- ▷ What are the key components to create an effective RFP?
 - » Provide relevant background documents
 - » Provide agency's standard consulting contract
 - » Qualifications Based Selection (QBS)

3. Issuing the RFQ/P

- ▷ How can an RFP balance being detailed enough for precision while remaining open to innovative solutions from consultants?
- ▷ What is a reasonable amount of time for proposal response?

Example of a Good RFQ/P

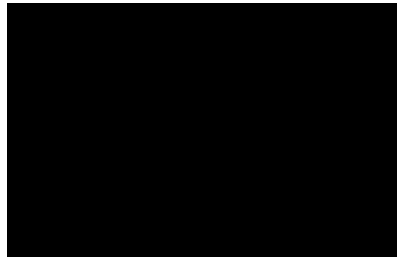
REQUEST FOR QUALIFICATIONS FOR
PEDESTRIAN UNDERCROSSING [REDACTED]

March 21, 2024

The Technical Qualifications Proposal must be submitted electronically and labeled:

"Request for Qualifications"
PEDESTRIAN UNDERCROSSING [REDACTED]

All qualifications must be submitted on or before 4:00 p.m. on Thursday, May 9, 2024 to the following email:



f. Exceptions

This Section shall discuss any exceptions or requested changes that Proposer has to the City's RFQ conditions, requirements and sample contract. If there are no exceptions noted, it is assumed the Proposer will accept all conditions and requirements identified in the attached "Agreement for Professional Services." Items not excepted will not be open to later negotiation.

All questions regarding the Request for Qualifications (RFQ) must be submitted in writing. Please send all questions regarding this Request for Qualifications in writing via email to [REDACTED]

(1) 7 weeks to prepare

(2) Electronic submittal

(3) Contract exceptions allowed

2

The Good

- ▷ What's the role of pre-proposal meetings, transparency and open communication in the RFP process?
- ▷ What is the typical cost of preparing a proposal and interview?
- ▷ What are the most effective criteria for evaluating consultant proposals?

2

Sample RFP Criteria

Criteria	Points Possible
Quality of proposal	25
Expertise and experience of listed team members	25
Related and recent experience completing similar projects	20
Demonstrated experience with community engagement	10
Ability to work cooperatively with and be responsive to agency staff, operations staff and stakeholders	10
Availability and staffing to complete the project within the timeframe and budget	10
Total Points =	100

4. Evaluating the Proposal

- ▷ Review criteria expressed in the RFP
 - »» Follow requested information precisely
 - »» How much is a point worth?
 - »» Understanding local preference – formal and informal
- ▷ To Interview or Not to Interview?
- ▷ When is an in-person interview better than virtual?

Example of a Good RFQ/P

City of Gonzales

1. Provide notice of upcoming RFPs to consultants

- ▷ Consultants can start doing their “homework”
- ▷ Some firms won’t pursue if BD staff wasn’t aware of RFP prior to issuance
- ▷ Results in more and better proposals

2. RFP Distribution list

- ▷ Consultants (on-call list or wider distribution?)
- ▷ Lead Services (Deltek, Integrated Marketing Systems)
- ▷ Ask colleagues for referrals for similar projects

Example of a Good RFQ/P

City of Gonzales

SCHEDULE

The RFQ schedule is:

Milestone	Date
City Issues Request for Qualifications	January 30, 2024
PreProposal Meeting at Community Meeting Room at Gonzales Police Station (109 Fourth Street, Gonzales)	February 15, 2024 at 10:30 AM
Proposal Submittal Deadline	February 29, 2024 at 3:00 PM
City Staff reviews submitted SOQs	March 5, 2024
Interviews	March 19, 2024
City negotiates scope/fee/schedule for initial Task Orders with top ranked consultant	March 21, 2024
Approval of Contract at City Council Meeting	April 1, 2024

← 4 weeks to prepare

← Pre-proposal meeting

← Negotiation

← Contract exceptions

CONTRACT

The City's standard consultant agreement is attached. Provide a statement in the SOQ regarding the firm's ability to execute the city's consultant agreement and include desired revisions to the city's agreement in the separate envelope transmitting the Consultant Rate Schedule.

Best Practices for Good RFPs

- ▶ City Manager, Finance staff, User Department Support
- ▶ Clarity, specificity, and alignment with project goals
- ▶ Clear budget and schedule
- ▶ Qualifications Based Selection (QBS)
- ▶ Advance notice of RFP
- ▶ Use of On-Call/Master Service Agreements
- ▶ Detailed scope of services and technical requirements
- ▶ Clear selection criteria
- ▶ RFP schedule +4 weeks
- ▶ Open/transparent communication with agency throughout process
- ▶ Negotiable contract terms & conditions
- ▶ Short list firms for interviews
- ▶ Formal notification of selection and offer debrief



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Request For Proposals

Questions and Answers

Contact Information



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