

TRANSCRIPT

Tele-Workshop: Developing an RFP for Projects

Chel: We have some very talented speakers today because today we're going to cover:

- 1.) What is an RFP?
- 2.) Do RFP's have to be complicated?

Some of you posted those questions on the online forum:

- 3.) What is the difference between a bid and an RFP?
- 4.) Why do we do RFP's?
- 5.) What types of questions do you ask when you do an RFP?
- 6.) What is the structure of the proposal you anticipate receiving? In other words, how do you evaluate it?
- 7.) Where do byways go to get more information and help?

And to conduct our teleworkshop today, Mark Conley from our office who is the Federal Landscape scenic byways coordinator is going to facilitate the call with two talented and very valuable speakers. We have Chris Spurl in the line. And Chris is a landscape architect with the Rocky Mountain Regional Landscape Architect--in the Rocky Mountain Region; he's a landscape architect and recreational planner. He's worked in Colorado, Wyoming, South Dakota, and Nebraska, and Kansas. Chris has done a lot of work with interpretative design, and a lot of the LA Services out of Golden, Colorado. And Chris, I think, can provide a wealth of experience on just the work that he's done in working with various forest service folks and byways in that area on how to do RFPs. Other career experience included being a project manager for a private landscape architectural and [INDISTINCT] planning firm. He is also, was an assistant horticulturist for the New Orleans Botanical Gardens. So that might spur some phone questions. We also have David Guiney, coming from the other side of the country, and he's at Harpers Ferry Interpretative Media Center in West Virginia. And some of you may have met David in some of the trainings we've done before. He brings a wealth of experience in interpretative media planning. And David is the interpretative media specialist for the Park Service. He works to provide training and education as well as technical expertise for Park Service projects and interpretative and wayside exhibitry. David has worked extensively with parks across the country and has also taught many workshops and has a great deal of background on soliciting RFPs for interpretative projects. And some of you I think have even participated in the public courses that we've provided with Harpers Ferry in the past. So with that, I welcome our speakers. And I'll turn it over to Mark who's going to facilitate and I'll be quiet.

Mark: All right, good afternoon!

Participants: Good afternoon!

Mark: My name is Mark Conley I represent the Forest Service, The Bureau of Land Management and the other Federal Land Management Agencies here in Byway Resource Center. And I'm really delighted today to have two outstanding speakers that's done a lot of work writing and evaluating RFPs. And the way we're going to start the call as Chel mentioned, we have a number of questions and we're going to allow both Chris and David to give their perspective in a conversational manner. And then we'll hold all the questions until the end. And we'll leave about 15 to 20 minutes for questions. And then, you know, we'll have some follow up resources that we can provide after the call, as well as, we'll send out an e-mail with those resources. So, with that, I guess, first, I'd just like to, maybe, Chris and David, if you just want to say a few words before we jump into the questions, maybe, anything in general about the Byways Program that you're working on and David from your work at the Harpers Ferry Center.

Chris: Well, my position here in Colorado is--along with being the Regional Landscape Architect and Recreation Planner, I'm also a governor-appointed commissioner for the State of Colorado in the Scenic Byways Programs. So I've got a pretty good experience in reviewing grant proposals for the Scenic Byway Program here in Colorado, but I also oversee Wyoming, South Dakota, Nebraska and Kansas also. So, I do have quite a bit of experience in Scenic Byways. I don't know--David, if you want to go?

David: Yeah, this is David Guiney from Harpers Ferry. And I, I haven't done, that was, I guess, with it, I'm probably more of a media planner, someone who doesn't work as much with contracting as I do with trying to get media done for the Park Service, over the years at Wayside exhibits and in indoor exhibits principally, and have been involved in the contracts of those representatives that some of you know what that is in the government, you know, working often with contracts. But I think my strengths in this may be more on the media planning side, on what kinds of--what's involved in doing interpretive services. And so, we have an office here that does some very complex contracting for a whole range of interpretive media things such as films or wayside exhibit signs, door furnishings, publications. And one of the hand-outs, I think, that was available to you was a rather complicated and indefinite quantity contract, and we have many of them that are posted on our website which I can give you maybe here at the end of this call. So, we have people that know every aspect of contracting and I'm not a real contract expert, but I have worked on something to compare contracts, and worked with contractors. So I'm hoping that I can provide some information in that area.

Chris: And to add on to that, my experience here is more in relation to dealing with RFPs for indefinite quantities, contracts for A&E firms here, either architectural or engineering or landscape architecture. But also, the Forest Service in recent years has implemented the possibilities of using RFPs to procure construction contracts also, which is--it's new to the Forest Service. And we've had a lot of success in that regard. And I know I'll probably talking more about construction RFPs a little later in the presentation.

David: I think that this, this is David again, someone like this, just to allow this--I'm not really a real good business person. And I find some of that--some of the, let's say, administrative work that we have to do is a little intimidating from time to time. So, I think, my goal is to going to be to try to be, you know, to try to simplify some explanations of these processes as much as possible. If you have not been involved with contracting before, I think our goal of the call is to try to make it less imposing, a little bit more common sense. And I hope, when we get down to your questions, we'll be able to--if we've missed something along these lines or made it sound too intimidating, we'll try to make it easier for everyone.

Mark: Thanks, David and Chris. So, as Chel mentioned, we've structured six questions that kind of just guide us in this conference call. And so, I guess, I'm going to just start right off with the first question. And maybe Chris, you could start off, what is an RFP?

Chris: An RFP of course is--stands for Request For Proposals. And it's basically, an entity such as the Scenic Byway Committee or whatever that body would be requesting proposals either for services or for construction work to be completed at a--you know, by a certain time or date. It's, in our regards, typically, we, with, you know, before an RFP was available we would go with sealed bids where it was just a call for sealed bids on contractors. And an RFP is, it's really, it's a different approach or a different mechanism to procure either that service or that construction item. And if you'd like to add on to that, David, that'd be very, I know you did a, probably, a better job in describing it yesterday than I do.

David: Well, I guess, since I'm a non-contract technical person, I'm kind of look at it from a more of a layman's point of view. An RFP, Request For Proposal, we really have two documents that we're dealing with. The first is the request, which is a document. And the second is the proposal, which is a document. So, since you are the client, you're going to prepare the request. And then, the contractor or what they call the offeror, the person who's going to be making you an offer will prepare the proposal. So, it might be easier to think of an RFP in terms of thinking about the two documents and what they are. And the request is simply the fact that you're recognizing that

with the project or work you want to do, you can't do it all yourself. And you can't do it just with volunteers that might be in your organization. You're going to have to buy some services. And, so that's where, you know, why you would be approaching the concept of an RFP. And the other reason is, you want to demonstrate, perhaps, to whoever is giving you the grant money or to other stakeholders that you're trying to find the best price, the best value, a really good job, and that you're not just giving it to, you know, a good friend or something like that. But that you're really searching out the best talent to do this work that needs to be done. And by going to the RFP process, you actually are trying to find the best person, and also, you have documentation that you have done this that you would need to have to show it to someone else. But maybe early in this, we might look at, well, what's in the request document. And then, secondly, what's in the proposal documents that the contractor is going to send back to you. And in many cases, it's going to be multiple proposals that'll come back that you will have to evaluate. Chris, did you want to add something to that?

Chris: No. I think that pretty much answers it.

David: Well, I might just list a couple of things, just, you know, from this I had here of what might be in the request that would be sent out to the contractors. And the first thing might be a background statement about your organization and its goals, and the project that you see that's coming. It might be, and I could throw an example out here that would be familiar to someone like me, would be some wayside exhibits. These are outdoor exhibits. Then you have about, you think about ten of them, since you want a wayside exhibit planner to plan and possibly design. And, but before they get started, they need to know, everything about you, your organization, where are you from, how big your place is. And then, what your objectives are in the project, and describe it as best you can. When does this project start? When did the needs become identified?

And you might also want to give them some indication of the level of effort that they--the contractor is going to have to put forth. So, if you tell them ten wayside exhibits, and they've done wayside exhibit planning in the past, they'll get a good idea of about how much work that's going to be. If it was going to be a museum exhibit or an indoor visitor center exhibit, they might be wanting to know how many square feet are in the room that you want to plan. In some cases you might have to give them an idea of maybe what the budget is. And I'm not a technical expert on this, I think sometimes, maybe you're not supposed to tell what the budget is.

Chris: Yes, usually, Yeah, it's usually identified as a range.

David: In a range that's some sort of, the point is, you don't want people that can't make any money on your project to bid on it. If it's way too high or way too low, I mean, that's wasting everyone's time. So, they need to have some idea of about how much of the level of effort or, which can be translated into money would be involved in the project. So, that might be the first thing: the background, describe the project in general. That sound good, Chris?

Chris: Uh-huh. Uh-huh. And Mark to, basically what David is going through, right now, is number 4, the A part of number 4--

Mark: Correct.

Chris: On your agenda?

Mark: Right.

Chris: So that everybody knows where he's going with this.

Mark: Do you want to add anything, Chris, to that?

Chris: You know, the background project basically sets the foundation for the RFP. It, basically gives that contractor an idea of what they're going to be focusing on. Once that background is established, then, this is where you

develop your scope of work, where you've identified what is, what are the tasks and deliverables that you want that contractor to provide to you at the end of that contract. The scope of work can be very selectable. But, in my experience with RFPs, the more details you can become with your scope, the more information you're giving that contractor, the better price you're going to get from the contractor. And they'll be able to focus on, you know, according to these tasks and deliverables. What is it that they can describe and their proposal that best suits what you've identified in that scope of work.

David: Right. One thing that we didn't say here in the beginning was when we talked about preparing the request document is it has to be sent to somebody. And so, another thing is to be doing a little research to find out what kinds of people or companies are available to do this kind of work. And they could be looking on the Web, talking to other people that are in your group that might give you leads on who might be good people, you know, perhaps the Resource Center might be a good place to ask for information on who does this type of work. So, you will, want to have a number of people. I would say, you know, at least three, and maybe more. And if you have the time and the ability to send it out broader than that, you could do that. Chris, on the scope of work, one thing I was going to say, some people think of the scope of work as the whole RFP, like, the RFP is the scope of work. But it really the scope of work is a part of the RFP. And it's the part where you describe what you want the contractor to do. In the first part I was describing, the background, you're talking about your organization and what the objectives of your organization are, and maybe, a little bit about, you know, what the overall project is. But in the scope of work, you're giving a pretty complete description of what you specifically want the contractor to do.

Chris: Correct. It really, the scope of work is kind of the heart of the RFP. That's where it needs to be pretty precise or pretty accurate as to what you're looking for. And it's going to take some background work on the request author, so to speak. They need to know, you know, what are the disciplines? They need to find out what are the disciplines that are needed to complete this scope so that they can describe in the scope of work. You know, if it's a, for example, if it's a design in a construction project they're going to need to know, you know, is it our architect and landscape architect, structural engineers, civil engineers. You know, quite a few different disciplines will need to be identified, or not necessarily the disciplines but the scope of work, basically, of what's going to, what's needed to complete the project. The other part of the RFP, like you said, David, is the RFP is the background, the scope of work. But then, you also need to give the contractor that's going to be sending in the proposals, you know, what are the evaluators looking for when they receive the proposal. And that's where it's written there; describe requirements of the anticipated proposal. You know--

David: Well, I thought one way to approach this, Chris, might be to focus a little bit on the request part, which is what we're doing now. And then, focus on the proposal and the structure of the proposal that the contractor is going to send in.

Chris: Right.

David: And there's a couple of other things that we could cover that are in the request. And in the scope I, just had six things down here that I can just resolve and Chris, you could fill in on these. But, of six things that might be in this scope of work would be: description of what you want the contractor to do. This would include, secondly, perhaps individual tasks that they would do, for instance. They might facilitate a meeting for you of your stakeholders and your resource people, say for the wayside exhibit project. And then, they might draft some exhibit text or they might prepare some layout. So, all these tasks, especially things that you know that are going to take time that they're going to have to estimate time for, you want to include in that list of tasks that you're asking them to do.

And then, out of that, they're going to deliver some things to you. We call them deliverables. There might be a draft plan. There might be a final plan, might be a color chart or some other things that they would be submitting. So you want to identify what the deliverables are that they have to submit. And normally, their payments are going to be linked up with something that they send in. Then, you're going to give them a schedule. You're going to say we want to start this job, a certain date. And it needs to be finished by a certain date. And then, in between the beginning and

the end date, you can propose some dates the deliverables should be sent in. And, you know, so they know when you want this done. They might not be able to do it right away. They need to negotiate time with them. But you want to give them an idea of that. Then you might want to tell them how much you would intend to pay them for each of these stages of work. Like in the first day of work, we'll give you, when you send your draft in, we'll give you 20% of the cost of this contract. And then, when you submit your final plan, we'll give you 60% or something like that. And then, you'll want them, tell them to be able to break out for you, how the costs are structured. Like, how much is in your labor? How much in your travel? How much in supplies perhaps, that kind of thing. So, those are the kind of things that they would be mentioning in the scope of work asking for--

Chris: Uh-huh.

David: These different elements.

Chris: Yeah, you're basically setting up project milestones.

David: Right. And then, the last big thing in the request is a detailed description of what their proposal should look like and how it should be arranged and formatted.

Chris: Right.

David: And we can get a little bit more into what that is. But, if you don't clearly describe that, you're likely to get documents back that are greatly different from each other.

Chris: Uh-huh. And it's hard--

David: And it will be hard for you to be able to compare them.

Chris: The evaluators correctly.

David: Because you're going to have to evaluate them. And so, if you say, I want this proposal to be in five parts. And I want to see this and that in each part. And then, you'll be able to lay them on the table, get a little group of you them together and be able to decide which one is the best.

Chris: Right. That basically, is your measurement standards.

David: Right.

Chris: Correct. And one thing Mark that I want to touch base on really quickly that we didn't really touch on was the difference between a bid and an RFP.

Mark: Yeah--what--and you go back to that question, you know--

Chris: Right.

Mark: Maybe you could go ahead and--you gave a feedback earlier but, maybe--

Chris: Right.

Mark: More detailed.

Chris: Right. Typically, people are aware and keep in mind, I'm still talking, I just kind of, I still have my construction hard hat on as a project manager. Whenever we needed a project constructed, you know, in years past it's always been, you know, bid and we were tied to always having to go with the low bid on these construction projects. With the RFP it gives us the selectability to look at the experience and past performance of the construction companies or the A&E firms if it served in the contract. And we can evaluate them on their experience and their past performance. And there are other elements that can be set, you know, established in that as well. And then, we also look at the price and it basically gives us the best value. At least for the government, what is the best value? So, we're not tied to go into the actual low bidder when goes through an RFP process. One of the things that they discovered with the low-bid process was you could get a contractor that would be the low bid, initially, but because of their poor performance or their poor experience, through change orders a lot of times, suddenly, when you add in the change orders into their base bid, they're not, they're up there with the high bids. So, it gives us that selectability not to have to go with the low bidder.

The other advantage that we have with an RFP is it gives us the ability if we have two contractors, typically, on a construction project, we could get anywhere from five to ten proposals from different contractors. It's not uncommon to have two contractors that are so close together that we consider them, basically, a tie. We have the ability through the RFP to negotiate with those contractors to get a better price from them where we didn't have that ability with sealed bids. So, we really appreciate the RFP for that flexibility alone. And I know there probably are going to be some questions later on, so with that, we can go, we can move along.

Mark: Chris and David, now you've explained a lot of what goes into an RFP. And it comes back, you know, we've gotten questions about, do RFPs have to be complicated? Maybe, if you just give us your perspective on writing RFPs. How complicated is it to put one together?

Chris: You know, the first time that I had to do an RFP, it was pretty complicated for me simply because it was just a new process. Now that I've been compiling an RFP or I've sat in as an evaluator on a lot of RFPs, the more I become familiar with it, the easier it becomes. I, you know, any government agency is, you know, we do have some hoops that we need to jump through as far as our fees are concerned. But I know that the comfort level has drastically dropped since I've been more involved with them. David I don't know about you.

David: Well, I think that they can be very complicated again if you're working within a bureaucracy that does have a lot of compliance that you have to go through. So, that's one thing I would say is think about, are you doing the RFP so that you can, you know, get a really good contractor on board and to please yourself and to please, you know, your colleagues in the organization, or do you need to do it to demonstrate that you're complying with something that you need to comply with. So, you might, if you're in that situation where there's someone else saying, you need to do this because the government requires it, then, I would get what the government representative whether its the State or the Federal and, you know, a contracts office with a, you know, this contract officer or contract specialist and let them tell you what it is that you need to have in there. But, I think, it can be a lot simpler if you're just pleasing yourself by just kind of going through the elements of the request that we just went over. And then, I think, we want to be able to look at the, what goes into the proposal that the contractor is going to be sending because, you know, in your RFP, you're going to have to describe what they are to send you. And maybe, Mark, we're at that point where we can run over those things. Is it a--4 or 5 things there?

Chris: Yes.

Mark: That's a, really good David. Yeah, why don't you just go into that?

David: Okay. Well, you know, let's just say you're hiring an individual or a little company to do, let's just say, they're going to plan those ten wayside exhibits for you. And the first thing that you want to know is who are you that's going to work for me? So, you're, basically, looking for a resume of some sort for that individual or for the individual in the company who is going to do work for you. So let's have resume information.

What's your education? What positions have you held including your current one? Have you won awards for your work? And, you know, you can just refer if you're good at resume writing yourself, you'll have a good idea of what you might specifically want to ask for there. And you can be specific and say this is what I really want to know in your resume information. So that's your key personnel that are going to be working for you.

The second thing is a little simpler to deal with. And that is what kind of equipment or facilities do you have in order to be able to do this work? And in the case of construction, Chris and I were talking, well; you might need some bulldozers to build a road. Do you have them? But in other cases, like, in the work that I do, in interpretative media, it's probably more computer tools that we're interested in. And I'll just give you an example here. You might say, well this person is only going to just write up some documents for me, so they don't really need too much. But think about this, you know, let's say, they might need to have Adobe Acrobat to prepare documents that you can read. You know, they might need to have Microsoft office or they might need to have Adobe in Design to do layout work. And they might need to have a real office and not just a cell phone and an automobile somewhere. So if you think that any kind of facilities or equipment might be important for your work, then ask them what they are. You can tell them things like, you know the things I have just mentioned that you want to know that they have.

The third thing is you want them to describe how they would tackle your project, and this could probably be a series of paragraphs. Up here we call it the technical approach, technical approach, and it's just a description of how, how they understand this job and how they would go about it. And they might have some special qualifications to do a great job on your project. And this gives them an opportunity to tell you all about it and to tell them how uniquely suited they might be to be able to do your work. You'll also be able to know when they do this part whether they really understand what you want, because if they don't repeat back to you something that sounds like you want done, then maybe they don't understand your job and also they might not bid on it properly if they really don't understand what you want from them.

Chris: In some of the proposals that I have reviewed, hey, you hit it right on the head. A lot of time they'll, they go off on a tangent that is completely not related to the work that you're wanting and you know, that automatically is a red flag as an evaluator when we see something like that in their approach. It definitely sends up a red flag.

David: Uh-huh. But you might want then talk to them and just make sure that everybody's you know, seeing the same picture, because if you're not then it'll be bad down the line. There's two other parts here that I have in the proposal that you're asking for them to submit, and the fourth part is the samples of work. You want to see something they've done that shows they can do this type of work, say the wayside exhibits, they might show you a couple of photographs of exhibits they've done. They might show you a document that shows some of the exhibits texts they've written or some layout, layouts for wayside exhibit panels. In the case of, say, buying, somebody who's going to do training for you, you might want to see an evaluation of their training course. But in any case perhaps they should submit to you something so that you can, they can demonstrate to you that they've done similar work to what you're asking for.

And then in the last part, past performance, we call it the past performance section. You're going to ask them for the names of people, former clients or they might even be current clients that have done the type of work you want, so that you can contact those people and discuss their satisfaction with this contractor's work. And there's a couple of ways that once you get their proposal back that you can go about contacting these people. It might just be that you call them up and talk to them about it. You could send them a form and ask them some questions and maybe ask the exact same questions of every client to determine how well these contractors had done.

And then the last thing for the proposal, they're going to have to give you price information of how much money they're going to want to do, to do the job, and that's sort of the last thing I have there under proposal.

Mark: Thanks David. This is the last question we have here. It'd kind of be a good segue into opening up to the individuals on the call for specific questions but where can the Byway leaders and Byway Organization go to get more help or information about RFPs, do you have any suggestions on that?

Chris: Well, I know as the Phoenix Highway Program has grown the network, of people, just highway committees or people involved with highways, the networking has just increased dramatically. Give other, I know here in Colorado we've got so many different scenic highways that are right on top of each other. A lot of people know each other in different highways and it's pretty simple to just get on the phone, or I know Sally Pierce is the State Scenic Highway Coordinator here. She's a great resource in that regard for the byways. So I would recommend one of the outlets would be your State Scenic Highway Coordinator.

David: I would say if you're associated with a Federal agency, either you're in a Federal agency or you have a partner that is a Federal agency, a park or forest or refuge, very often they will have contract staff that are contract officers or contract specialists that can give them technical advice on the RFP's and can also probably provide models and I think Chel, to turn this over to you briefly, I think you have, are going to may be getting some samples that could be posted.

Chel: Yes, David. Actually we will take not only the samples that we provided or the information we provided in advance of this call, but we will solicit other byway examples and then synopsise this call and put it on our website and also on the discussion forum. So folks from this call will be able to access additional information in the near future.

Chris: One of the other things Mark, that we didn't mention on our call yesterday that we've discovered in going with the RFP approach is it does take a little time. It's not something that happens overnight. When you're setting up an evaluation panel, you know, you have to work out their schedules. You have to give the contractor sufficient time to put their proposals together. You don't want to, you know; give them a week to put these proposals together. We, typically we give them a month to put the proposals together. So, just a bit of advice, you know. Keep that in mind. This is not a quick turnaround.

David: I think something else when you are writing your request, after you've described what you want in your proposal and describe the job and your schedule of work, at the end you might want a paragraph or two to tell the potential contractors what's going to happen next. We're going to get your proposal in and we expect to take about two weeks to review it. We will notify you that we received your proposal, and when it's all over we might be notifying you that you have won this job or that maybe you didn't but we'll give you a call. We'll kind of let you know how it turned out. If there is something in your proposal that was missing, we might give you a call and ask you to provide more information or you know, in case you want to work with us again next time we can let you know what, that we saw some weaknesses in your proposal, what they were and then when we will expect to, you know, be able to award it. So, you want to know put yourself in their shoes, there towards the end of your request and kind of anticipate some of the questions they might have and just let them know how you're going to approach it.

Chris: One of the other things that we mentioned yesterday also is, typically with A&E design contracts, architectural or engineering contract it's not uncommon for that our request to go out to receive the proposals, evaluate the proposals and then create a shortlist of potential contractors, you know. You could have ten proposals and you could shortlist it down to three, and it's not uncommon to set up an interview with the evaluation panel, for those three firms to come in and ask, give to the evaluation panel an opportunity to ask some additional questions that they felt the proposal didn't cover. And that's something else that could be considered in when they're structuring their RFP's.

David: Normally, the contractors are going to be doing this work on speculation, preparing this proposal they're going to send in. Some of the proposals are quite nice. They take a good bit of time to pull information together and to write it and edit it and mail it out, and they're not getting any money for that. In some cases you may feel that it's a good idea to take a little bit of your cash and you know, maybe, you know pick five of them and say we're going to

give you \$100, each of you. You know, for printing costs or just for your time in putting something together for us and you know, because some will say, "Well you know I, there's not much money in this job anyway and it's going to take us a whole day of our time to put this together and we might be losing money." If you feel, you know, that you want to help the process along, you could offer them a nominal amount of money to do a good job for you on the proposal.

Chris: Right. So, Mark, I think we're ready for questions if you want to--

Mark: Right.

Chris: Time to open it up.

Mark: Right. We've got about 17 minutes left to the call and so we can just open up on any general questions from anyone that has questions about writing or anything about RFPs.

Participant: Mark, Laura Brewer.

Mark: Hello?

Participant: Yeah, I'm Laura Brewer from Santa Fe Trail National City, New Mexico, I have a question on what recourse do you have if the job or a stage of that job is not completed properly? What's the next step?

Chris: Once the contract is awarded, and I speak through Forest Service projects, you've got those deliverables identified in the contract.

Participant: Uh-hmm.

Chris: And it's the ability of the contracting officer and the COR to make sure that the contractor meets those deliverable items, and typically they are, you know, with construction it's, you know, it's pretty clear cut as far as quantities and things of that sort. If the contractor doesn't complete those items, then at the end of the contract, it's up to the contracting officer to negotiate with that contractor on a reduced price on the contract.

Participant: Okay.

David: Mark, I think in the Federal Government, it might be a little easier since we have this core of contract specialists and we can go all the way to Washington with lawyers and everything that are already on board.

Participant: Uh-hmm.

David: But I would say, just on a smaller scale, if you don't have, if you're not using that big government system, if you have the payment schedule where you're asking them for deliverables, you're asking them to submit things to you as you go down through the project so you're going to check out each one and with each one, you're going to give them a part of their money. So, if they're fulfilling it, you give them the money. When they send in their next deliverables, that looks good, you send them that. So, you're not going to give them any money if they're not submitting those deliverables and they're not acceptable, and in your schedule of work--

Participant: Just--

David: You've already listed exactly what you want so you'd be, you know, you don't want to be in a position where, you know, it's one big price or something and then, you know, you want to be able to divide that job up and as they succeed, then they get the money.

Participant: Right. And this has been done very often where someone will, oh, say, a company goes belly up, just isn't able to complete it, can you take that same RFPs and just hand it over to another company or do you have to start the process over again?

David: I don't know the answer to that.

Chris: You know, typically we, unfortunately, and this is the government approach is we do have to, typically it would be, terminate the contract to the convenience of the government and we have to start the process all over again.

Participant: Okay. Thank you.

Another Participant: If you don't have the right resources on that, you can do performance bonding if you've got big a enough budget.

Chris: Correct.

Participant: This is Debbie. You might talk a little bit. Just because they submit a proposal does not mean you have a contractual agreement with anybody. Once you accept the proposal and say, "You got the job," then you enter a contract with them that should lay out performance standards, arbitration methods, all those kinds of things to anticipate the unanticipated.

Chris: Correct.

Participant: And so you've got 2 documents that you have to go through and I would strongly recommend that you incorporate the scope of work and the contractual agreement that you put together with your contractor.

Other Participant: Okay. Thank you.

That's good.

Participant: Mark, this is Bob Koeplin, Sheyenne River Valley. Just a few comments that if you don't have a lot of funds when we got down to the final three and if we knew them, we save them an awful lot of money after they submit their package just doing phone interviews. Another thing, this is a comment we've done as we give them a budget range but we've also told them, "Tell us what it would do--cost to do it right," because maybe another \$20,000, we'd have a Cadillac versus a Chevy. And last but not the least, I guess, I'd be looking for somebody that might review our RFPs that we used that were from 4 to 8 pages that landed us 50, 180, \$125,000 contracts just to see what we might have missed in our simple format.

Chris: That's an excellent idea also.

Participant: All right. I didn't understand that point.

Chris: Pardon?

Participant: This is Glenda Pike from the Historic Route 66 Byway in Missouri. I have a question in regards to is there any words of wisdom to apply these things to a Corridor Management Plan?

Chris: Definitely. The Corridor Management Plan would be considered a service contract on which there's really not much different than an interpretive Master Plan or, you know, David, you can--

David: That would be like an interpretive plan--

Chris: Yeah, yeah. It's, the Corridor Management Plan would be very simple to do an RFP for--

David: I think you're asking them to do some facilitation perhaps, or run some meetings.

Right.

David: Take notes, do writing, perhaps some research, a little bit of research, so I think it would be a good candidate for a little RFP.

Chris: I think we had a question on the previous comments from the gentleman from Cheyenne.

Participant: Yeah, I didn't understand exactly--

Chris: Right. He, your third comment that you made, a person wasn't quite sure what you were talking about. Can you explain?

Participant: We had the three RFPs that we did for marketing visitor center and interpretation went from 50 to 125 to \$180,000 on three different projects. All I'm saying is ours are from 4 to 8 pages long and I guess I just want you to know if somebody out there would like a preview and to tell us what we might have missed, but we had fairly simple RFPs and still pulled off some pretty good-sized projects.

Chris: Right.

Participant: This is Pam Portwood with the Big Bend Scenic Byway in Florida, I don't think that I've had comments for your RFP but I sure would like to see them for examples because I would love to be doing RFPs that were 4 to 8 pages instead of fifty. And I also had a question when you were going through the scheduled work and you listed the six, part of that is a cost structure. I really missed what that was under the request portion.

David: We had, I think, five sections and the reason that, you know, I've been involved in evaluating proposals, and here in the Federal Government, the money part of it goes to a special group and not to people like me that are kind of the subject matter specialists. I'm more of a planner. I'm not, you know, so I don't get involved in the money side. So I'm not quite as familiar with it. But, in what they're proposing, obviously, they have to propose what they're going to charge. It might be an hourly rate that they're going to charge. That might be the way they represent it and they're going to work, so proposing work how many hours the company will work for you but they do have to submit what they're going to charge you for.

Participant: Yeah, I see.

Participant: This is Debbie again. There are numerous ways to include a price in the proposal. Some government entities do not want you to put the price that you're willing to charge them in initially because they truly want a consultant qualifications-based selection process rather than going directly to the bottom line. Some groups want to know the price right off the bat because they have a limited budget, but it's important, that's why it's important for you as the RFP producer to put in the range that you're going to accept. because you don't want someone to lowball the project totally and do a lousy job nor do you want someone to, you know, use your next ten years worth of funding for something that shouldn't cost that much, but there's a whole difference. Some people put the cost in a separate envelope from the rest of the proposal. Some people don't discuss cost till after the contractor has been chosen and enter a negotiation plea. Some do it during the interview process so there's a whole different variety of different ways that it can be done.

Chris: And it is up to you formulating the RFP to decide how you want to handle the pricing.

Participant: Right.

Chris: Those, those are pertinent--

Participant: You need to decide all of that ahead of time, and I think the beauty of writing your own RFP by the way, is the fact that it makes you clear in your own mind what it is you want to accomplish with this project. Because the clearer you are in what you want to do, the much easier it is to get a quality project out of the contractor.

Participant: Right.

Participant: I'm Lauren Kornel from the City of Ormond Beach, Ormond Scenic Loop and Trail. I think one of the previous questions about the scope of work was maybe that person was wanting a recap of what those five or six items were that she went over and I think 1. was like a description of work, 2. was deliverables, identifying deliverables and 3. was the schedule, and 4. was maybe like a list of percentages you might pay throughout the contract and then 5. was describe the format. In other words, how do you measure the standards for evaluation? I think there was like five steps if I'm not correct, then, I'm not sure. Maybe, I missed that one.

Chris: David, there were 5 steps or 5 items which you identified the scope of work is what we were talking about. So, the 4--

David: Yeah, I had--this was the part where I was describing the first part--well, there were main parts and then I broke the scope down into subparts.

Chris: Right.

David: Let's say the first part describes the background of the project. The second big part was the scope of work. And then under that, I had six things under scope of work. These would be like subtopics. The first is the description of what you want them to do. Second is the individual tasks that if you know enough about their work and how they're going to go about that, you can describe that individually, the tasks you want them to do. Then deliverables, what they're going to hand to you, the kind of a product or intermediate product, the schedule, the percentage of money they're going to get for each of the deliverables that are turned in, and then the break-out of cost. And then, the third large part would be describing what their proposal should look like and how it should be organized and formatted, so that all of the proposals that you get will be pretty much apples and apples to compare.

Participant: Okay. It was that breakdown of costs that I was kind of confused about under that, under the scope of work. What do you mean by that?

David: Well, you want to know, I mean some people, you want to know where they see the cost in this work. Is it, you know, say if they were going to be doing Corridor Management Plan, is half of what they're charging the cost to have it all printed and bound and mailed? Probably not. It's probably going to be in labor, but what's the labor going to be for?

Participant: Uh-hmm.

David: How much do they think it's going to be travel? Do they think they're going to have to travel across the country to your site, you know, five times? That could amount to a lot of money, so you want to see where they think it is going to cost money.

Participant: Okay.

Another Participant: Think of it in terms of a budget.

David: Right.

Participant: Yeah, that clears it right up for me. Thank you very much.

Other Participant: And also remember that private contractors are in it to earn a living and make a profit, so that needs to be part of that budget as well.

Chel: Thanks, Deb. We are rapidly approaching the end of the hour, and what I noted from this teleworkshop is that we have a lot of expertise on the line in addition to our speakers today, and one of the things we discussed as we planned for this workshop is that we do get a lot of requests from the byway community here at the Resource Center about "Oh please provide us with a sample RFP" or "how do you write them" and I think as both Chris and David stated earlier, one of the best ways to learn is through networking, and I would encourage everybody on this line who does have some expertise or even some experiences to utilize the discussion forum on Byways Online, to post your ideas and if you would happen to have samples that you would like to provide to the rest of the byway community, you're welcome to also send them to us at the Resource Center with your permission obviously, we can provide those to the rest of the byway community if they so choose.

As we stated earlier, we will have a Podcast available of this particular recording and we'll send everybody that's been on the line a certificate of participation. I would love to see this conversation continue. I think it was a very robust conversation. So, if you do post more questions on the online forum, we will make our attempt to try to get some answers for you, because I think this is a useful topic. You will also receive an evaluation form in the, within a week actually, and we encourage you to fill that out.

It's an online evaluation and that helps us determine how well we're serving you and answering your questions. So, with that, I want to thank our speakers and thank everybody on the line. I hope it was a useful call for you today.

Participants: Thank you.

Thank you.

Thank you.

Thank you.

Thank you.