

# Modernizing the RFP: Utility and Consultant Perspectives on Creating Clearer, Smarter, and More Defensible Selections

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PNWS-AWWA Annual Meeting

# The RFP/RFQ process is a specialized, focused, and managed process more akin to getting in-sync with a dance partner than jumping into a mosh pit



There are ***Shared Objectives*** of project success because everyone benefits.

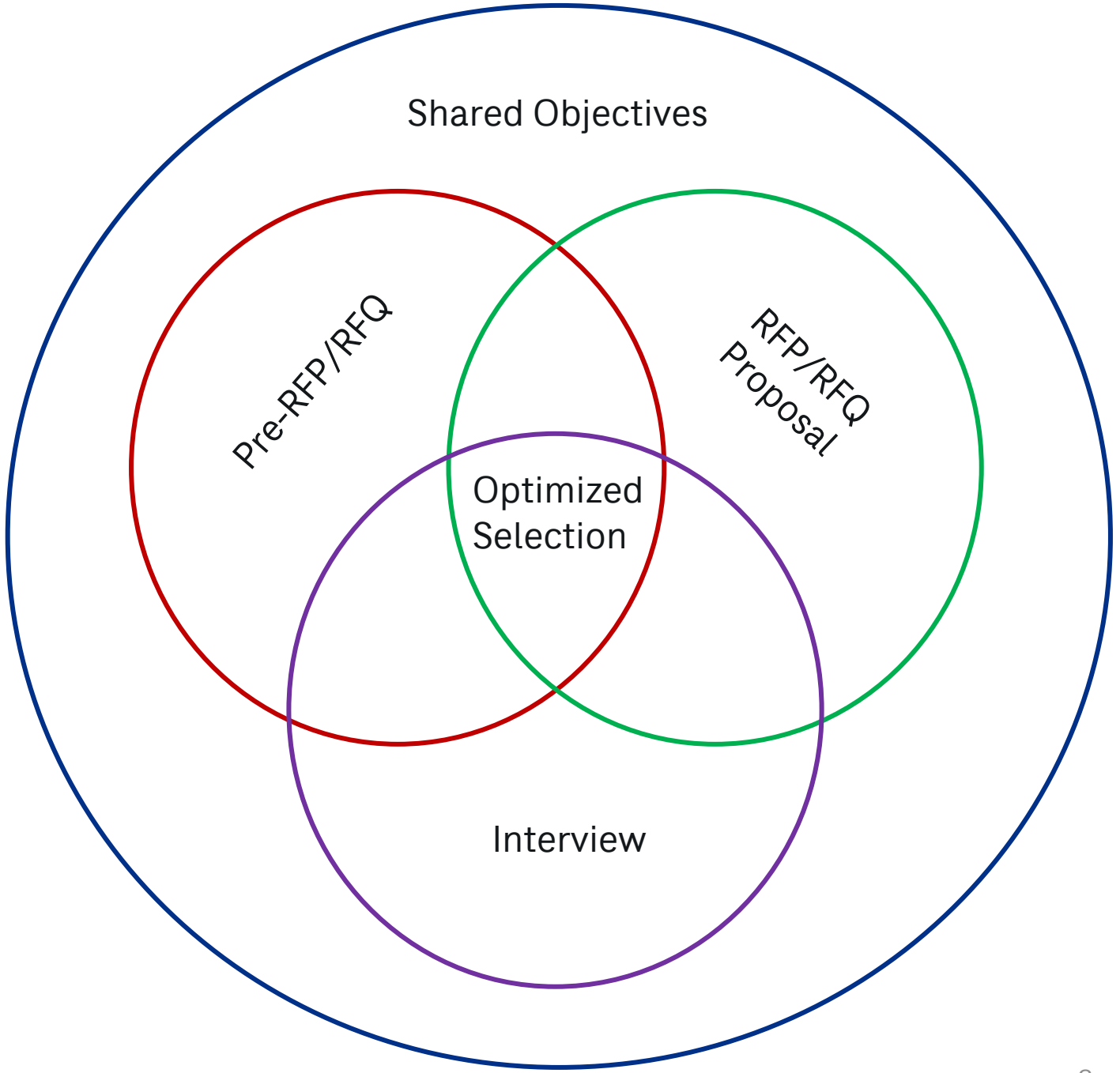
There is a ***Pre-RFP/RFQ Phase***. For consultants this starts long before an RFP/RFQ issuance.

The ***RFP/RFQ Phase*** is when clients seek specific information, and consultants seek to differentiate themselves.

The ***Interview Phase*** is the last step before selection, but perhaps the first time everyone comes together.

# Let’s start to understand each others needs and formulate a Win-Win outcome





# Today's Panelists



Moderator
Brian Murphy
Client Service Leader
CDM Smith



Moderator
Frank Dick
Wastewater Manager
City of Vancouver



Kari Duncan
General Manager
Canby Utilities



Tyler Clary
Water Division Manager
Clark Public Utilities



Jim Konigsfeld
Principal Engineer
Sammamish Plateau Water



Mike Hyland
Client Service Leader
CDM Smith



Mark Graham
Water Treatment
Practice Lead
Stantec



Kelly Kimball
Client Service Manager
Brown & Caldwell

# The Pre RFP/RFQ Phase

- Do Clients understand how early activities impact later results?
- What are Consultants AND Client's seeking/sharing?
- Do you see this as a two-way flow of information?
- Are Client's using the opportunity to use Consultant input to improve RFP/RFQ?
- Do you see early access as a Win-Win?

# The RFP/RFQ Phase

- Does the scoring criteria match the information requested?
- Does the stated budget match the scope?
- Are the right questions being asked to create differentiation?
- AI and “smart” proposals are here, do you use/allow it? QR codes? Iterative graphics?
- What are Red Flags in RFPs? Proposals?
- Are we overcomplicating things to be objective when subjectivity can never be removed?
- Is too much required information limit the opportunity to differentiate?
- Why are holiday RFP/RFQs a Lose-Lose?
- Does the page count match the complexity of the project?
- Are you imposing hard copy guidelines on digital submittals?
- A digital format offers opportunities, are you taking advantage? These are the same size font:

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# The Interview Phase

- What is the objective of the interview and is it going to swing the decision?
- Is it understood that interviews can be more involved and costly than the written proposal?
- Is your interview prep time congruent with what you are seeking?
- Is the interview structured to provide the information you are is seeking?

# Conclusions

Getting in-sync starts sooner than you think, both parties have a roll, and both benefit.






Nothing productive was ever accomplished in a spontaneous mosh pit.