

SOW 2.0

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Objective

- **Build upon SOW Part 1 with more examples & tips**

Objective

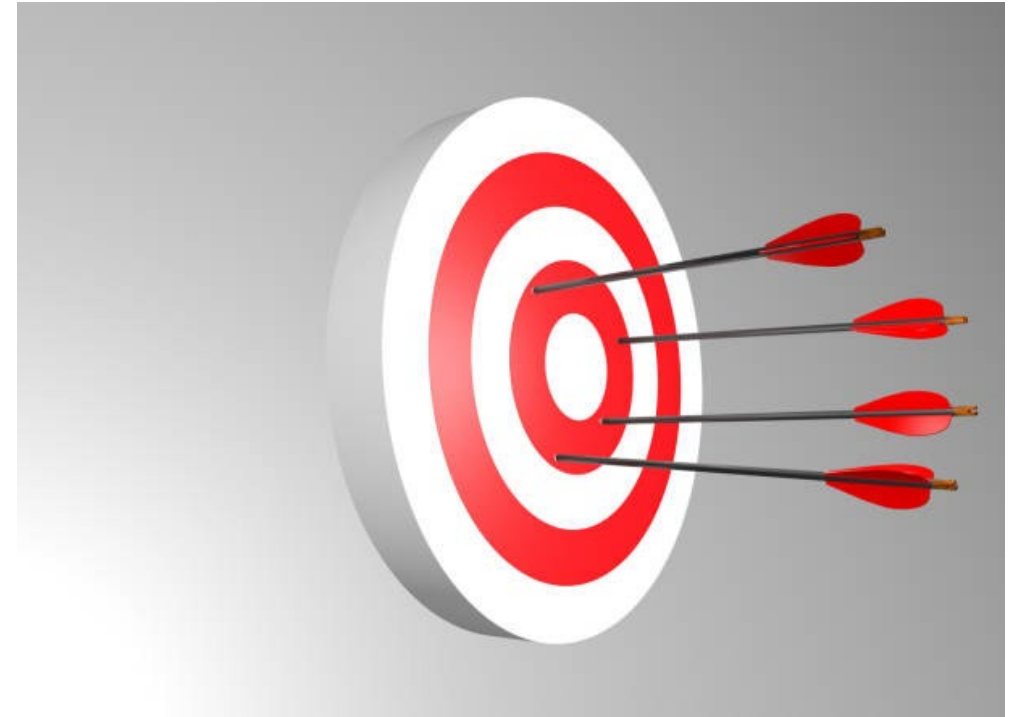
- **Build upon SOW Part 1 with more examples & practical tips**
- **3 Challenges + 3 Best Practices**
- **What to do when you don't know where to start (time permitting)**

Quick Recap

Goal Is Not Perfection!



***Goal Is Not
Perfection!***



***Do Our Best
Within Resource
Constraints***



***...But We
Can't Totally
Miss The
Target!!!***

Too Much

Not Enough



Impact of a Poor Scope

Perceptions of Owner Scopes

- **Unclear**
- Information is missing
- **Overly prescriptive**
- Unrealistic
- **Discourages innovation**
- The owner is “fishing”
- **Misunderstands Needs**
- *Procurement is Not Fair*



Impact

- **Fewer proposals**
- Low quality proposals
- **Less qualified teams**
- Less competitive pricing
- **Less consistent pricing**
- Open to interpretation
- **Have to believe the Proposer**
- *Brings Risk to the Project*

A “High-Performing” Scope requires the appropriate perspective...



UMPIRE MECHANICS

Theory of Proper Positioning

“Angle is primary; distance is secondary;
Closer is better, up to a point.”

TEXAS BASEBALL UMPIRES ASSOCIATION
TBUA



SOW Objective

What would a High-Performing Vendor want to know?

ALWAYS question whether the SOW....

- Prevents vendors from **walking away**?
- Allows vendors to provide the **best price**?
- Gives vendors **information to plan** their approach?
- Enables vendors to **minimize contingency**?

SOWs:

3 Challenges

+

3 Best Practices

(for SOWs, with examples)

Summary:

Challenges

- 1.
- 2.
- 3.

Best Practices

- 1.
- 2.
- 3.

Summary:

Challenges

1. SOWs that are too long & detailed
- 2.
- 3.

Best Practices

- 1.
- 2.
- 3.

SOW Challenge #1: Too Long, Didn't Read (tl;dr)

Mistaken Mindset:

- *“If I don't specify it, then I won't get what I want”*

Result:

- **SOWs that are long, detailed, and complex
(which also take more time to prepare!)**

SOW Challenge #1: Too Long, Didn't Read (tl;dr)

- **Large, enterprise level software**
 - ERP with FIN and HR modules
 - \$5M total cost for 5 years
- **Spent 4 months with a full-time project team collecting requirements, documenting needs, holding workshops...**

Ex: Table of Contents for HR Module Current State

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Ex: Content & Embedded Files for HR Current State

SECTION 2: HCM – Core HR Management

2.1 PAIN POINTS WITH THE CURRENT SYSTEM

a. Pain Points:

1. Delegation of authorization tasks in and out of hierarchy affects workflow (job change, etc.).
2. Occasional training issues as some processes are straight forward (i.e. how employee sets up a direct deposit)
3. Need to better utilize the notification and messaging.
4. Not a good way to make codes that are no longer used to be hidden.
5. Manually entering new hires is labor intensive given multiple data sources.
6. Synchronization of exception time (vacation, sick) plans between core system and time & attendance module.

b. Workarounds: List the “Workarounds” that have been built up to support the Current System.

1. Manual communication efforts due to limited notification/messaging.

2.2 STRENGTHS OF THE CURRENT SYSTEM

Major strengths, advantages, & “things people like” with the existing system, including:

1. Generally user friendly.
2. Less risk due to more rigid processes.

2.3 CORE FUNCTIONS, CAPABILITY, AND CALCULATIONS

Most critical functionality, capabilities, calculations, etc. that the system possesses.

- Functionality to dynamically manage employee personal and organizational data residing in internal systems and mobile devices.

2.4 REPORTING, VISUALIZATION, AND DASHBOARDS

Reports, dashboards, and other visualization aspects that are critical to the system.

- Standard basic HR reports.
- EEO-1 reporting.

2.5 BUSINESS PROCESSES & WORKFLOWS

Workflow diagrams and process maps for all critical business processes.

See process documents in Appendix A.

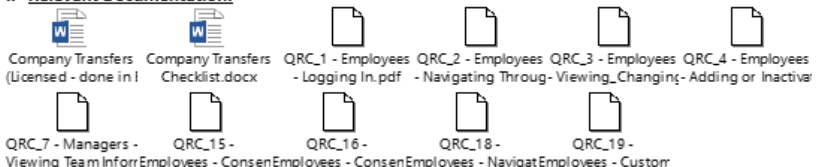
2.6 CURRENT USER CHARACTERISTICS & VOLUMES

STAKEHOLDER GROUP	USER TYPES	VOLUMES	USER ROLES, CHARACTERISTICS, AND NEEDS
Human Resources	Payroll User	Less than 5	Supply payroll authorization for new employee.
Human Resources	Executive Administrator	Less than 25	Entry of organization changes, team designations.
Human Resources	HR Ops Admin	1	Administer employee access control.
Human Resources	HR Core User (basic & super user)	Less than 5	Entry of fundamental data for reports; generates reports for consumption.

2.7 USERS & STAKEHOLDER GROUPS

- a. User Stories: See the sequenced user story document in Appendix B.

b. User Assessment of Current Conditions:

Stakeholder Group: Human Resources, Payroll
A. User Backgrounds: Exec Admin, HR Ops Administrator, HR Core User
B. Critical Tasks & Processes: Enter organization changes, team designations, administer employee HRM access control, enter fundamental data for reports; generate reports for consumption.
C. Critical Functionality: Dynamic management of employee personal and organizational data, access control, reports.
D. Top 10 Strengths: Captured in aggregate at the module level above.
E. Top 10 Pain Points: Captured in aggregate at the module level above.
F. Critical Data: Employee and organizational data.
G. Needs: See pain points in subsection 1 above.
H. User Stories: See the user story document in Appendix B.
I. Relevant Documentation: 











2.8 HISTORIC DATA CHARACTERISTICS & VOLUMES

- a. **Critical Data:** Critical data sets & sources that are used by the current system.
Employee and organizational data.
- b. **Data Volumes:** Describe the volume, size, quantity of transactions/calculations, size of data storage, etc.
To be supplied at RFP.
- c. **List of Data Sources:** Data sources that currently feed the system.
Employee HR self-service, Manager HR self-service, HR Admin data entry, onboarding system inputs
- d. **List of Data Outputs:** Data outputs (and associated destinations).
Employee information to Hyperion Essbase, HR data files to Technology Enablement.
- e. **Missing Data:** Critical data that will be missing (or will not be able to provide to vendors).
Additional technical depth for this business capability will be provided at the time of the RFP.

2.9 DATA STORIES

50 pages long...

Ex: after 50 pages of dense content...

Appendix A – Human Capital Management Business Process Workflows		Appendix B – Human Capital Management User Stories
<p>The embedded document is a compilation of the user stories provided in the course of HCM requirement sessions.</p>	<p>Onboarding  HR Onboarding_AV072</p> <p>Payroll & Tax  HR Payroll and Tax_AV072319.pdf</p> <p>Position Management  HR Position Management_AV072</p> <p>Recruiting  HR Recruiting_AV07231</p> <p>Self-service (Employee and Manager)  HR Employee and Mgr Self Service_AV07231</p> <p>Succession Readiness  HR Succession Readiness Process F </p> <p>Talent Management  TA Process Review, draft.pdf</p> <p>Tax Reporting & Payment Tax Reporting & Payment Administration workflow is captured in the HR Payroll & Tax process flow.</p> <p>Time & Attendance  HR Time and Attendance_AV0723</p>	<p> HR USER STORIES 0807p kh.docx</p> <p>..... END OF SCOPE OF WORK SECTION #2</p> <p>22 pages long</p> <p>15 more embedded files</p>

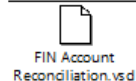
And then the CC's for the FINANCE Module...

APPENDIX A - Finance ERP Business Process Flows

Business Process Flows by Business Function

The embedded documents below represent the as-is business function and SOX process flows that were elicited during Finance ERP requirement sessions.

Account Reconciliation



Accounts Payable



Accounts Receivable

Accounts Receivable workflow is captured in the SOX diagrams below.

Cash Management

Cash Management workflow is captured in the SOX 'Cash Flowchart' diagram below.

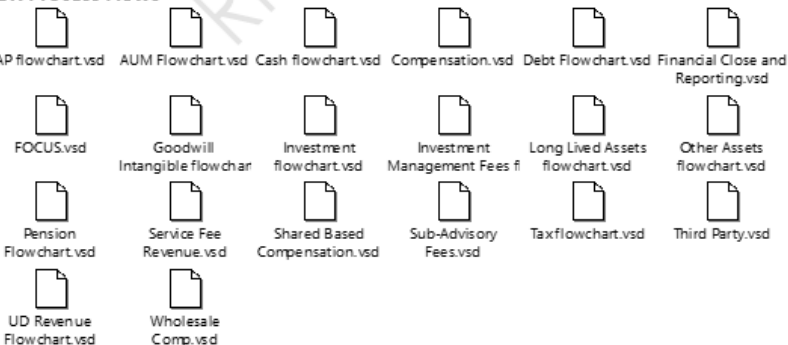
Contracts



Expense Integration



SOX Process Flows



Finance Reporting & BI



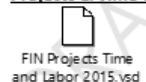
Fixed Assets

Fixed Assets workflow is captured in the SOX diagrams below.

General Ledger

General Ledger workflow is captured in the SOX diagrams below.

Projects & Time-Labor



Purchasing & iProcurement



Workforce Planning & Revenue/Expense

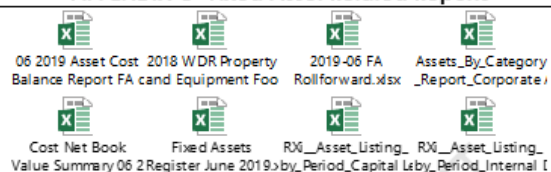


APPENDIX B - Finance ERP User Stories

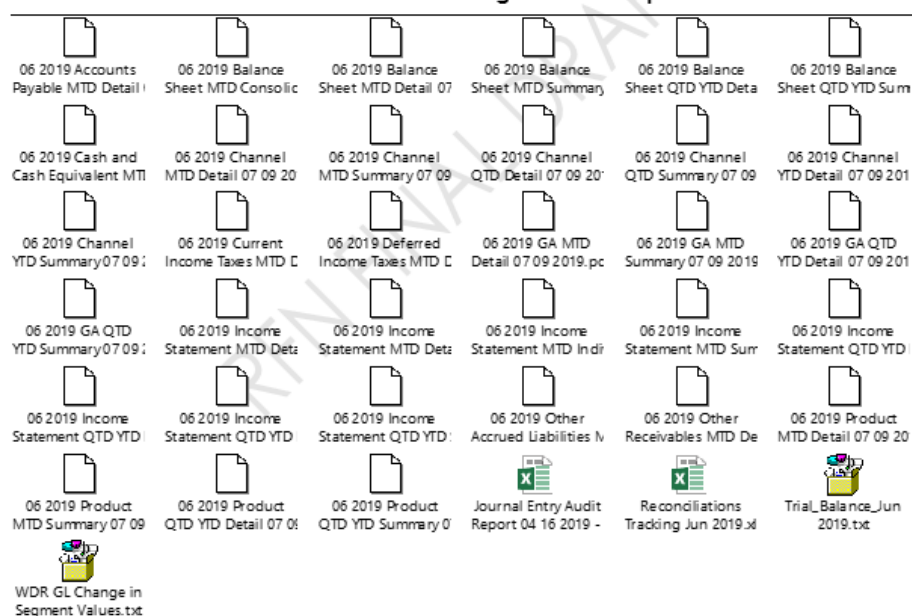
A compilation of the user stories provided in the course of Finance ERP requirement sessions.



APPENDIX C - Fixed Asset Related Reports



APPENDIX D - General Ledger Related Reports



And then the CC's for the FINANCE Module...

APPENDIX A - Finance ERP Business Process Flows

Business Process Flows by Business Function
The embedded documents below represent the as-is business function and SOX process flows that were elicited during Finance ERP requirement sessions.

- Account Reconciliation**
FIN Account Reconciliation.vsd
- Accounts Payable**
FIN Accounts Payable.vsd
- Accounts Receivable**
Accounts Receivable workflow is captured in the SOX diagrams below.
- Cash Management**
Cash Management workflow is captured in the SOX 'Cash Flowchart' diagram below.
- Contracts**
FIN Contracts ERP and Vines.vsd
- Expense Integration**
FIN Expense Integration.vsd
- SOX Process Flows**
 - AP flow chart.vsd
 - AUM Flow chart.vsd
 - FOCUS.vsd
 - Goodwill Intangible flowchart.vsd
 - Pension Flow chart.vsd
 - Service Fee Revenue.vsd
 - UD Revenue Flow chart.vsd
 - Wholesale Comp.vsd
- Finance Reporting & BI**
FIN Finance Reporting + BI Solu
- Fixed Assets**
Fixed Assets workflow is captured in the SOX diagrams below.
- General Ledger**
General Ledger workflow is captured in the SOX diagrams below.
- Projects & Time-Labor**
FIN Projects Time and Labor 2015.vsd

APPENDIX B - Finance ERP User Stories

A compilation of the user stories provided in the course of Finance ERP requirement sessions.

FIN USER STORIES 0807p.kh.docx

APPENDIX C - Fixed Asset Related Reports

- 06 2019 Asset Cost Balance Report FA
- 2018 WDR Property Equipment Foo
- 2019-06 FA Rollforward.xlsx
- Assets_By_Category_Report_Corporate
- Cost Net Book Value Summary 06 2 Register June 2019
- Fixed Assets by_Period_Capital
- RXG_Asset_Listing_Laby_Period_Internal

APPENDIX D - General Ledger Related Reports

- 06 2019 Accounts Payable MTD Detail
- 06 2019 Balance Sheet MTD Consolidated
- 06 2019 Balance Sheet MTD Detail 07
- 06 2019 Balance Sheet MTD Summary
- 06 2019 Balance Sheet QTD YTD Detail
- 06 2019 Balance Sheet QTD YTD Summary
- 06 2019 Channel Summary 07 09
- 06 2019 Channel QTD Detail 07 09 2019
- 06 2019 Channel QTD Summary 07 09
- 06 2019 Channel YTD Detail 07 09 2019
- 06 2019 Deferred Taxes MTD Detail 07 09 2019
- 06 2019 GA MTD Detail 07 09 2019
- 06 2019 GA MTD Summary 07 09 2019
- 06 2019 GA QTD YTD Detail 07 09 2019
- 06 2019 Income Statement MTD Detail
- 06 2019 Income Statement MTD Indirect
- 06 2019 Income Statement MTD Summary
- 06 2019 Income Statement QTD YTD
- 06 2019 Income Statement QTD YTD
- 06 2019 Other Accrued Liabilities MTD Detail
- 06 2019 Other Receivables MTD Detail
- 06 2019 Product MTD Detail 07 09 2019
- 06 2019 Product Summary 07 09 2019
- Journal Entry Audit Report 04 16 2019
- Reconciliations Tracking Jun 2019
- Trial Balance Jun 2019.txt



SOW Document	Length
Current Conditions (HR Modules)	52 pages 56 embedded files
Integration Lists (HR Modules)	4 pages
Current Conditions (FIN Modules)	51 pages 27 embedded files
Current Condition Appendices (FIN Module)	4 pages 74 embedded files
List of Requirements (HR Modules)	18 pages 399 requirements (or 446?)
List of Requirements (FIN Modules)	29 pages 540 requirements (or 570?)
Cost Center Structure	4 pages (size 8 font)
Security Requirements	89 items (x2, 1 for each module)
Technical Requirements	86 items (x2, 1 for each module)

158 pages + 157 embedded files + 1,289 requirements

Note: took me 45min to open these files and get page counts



Result:

- **Client's Scope must:**

- Make it easy for Proposers to find & understand the benchmark.

Example: Reviewing 4 Cost Proposals for an ERP System

- **Quoted licenses ranged from 0 – 2,200.**
 - 0 (TBD later **after they are awarded** the contract)
 - 1,260 to 1,450
 - 1,300
 - 2,200

How can you compare the Cost Proposals?

Other Examples:

Other Examples:

Professional Services:

Table of Contents:

(NOTE: the Available Supporting Documentation of Sections 8 – 14 is provided in a .zip file posted to the online Drexel RFP site)

Section 8:	Site Characterization Studies and Reports
Section 9:	Corrective Action Documents
Section 10:	Consent Order Documents
Section 11:	Remedial Action Plan and Supporting Documentation
Section 12:	NPDES Permit and Groundwater Monitoring Documentation
Section 13:	RCRA Site Remediation Plan and Supporting Data
Section 14:	Storm water Management Plan and Supporting Documentation

**Hundreds of pages of
reference materials**

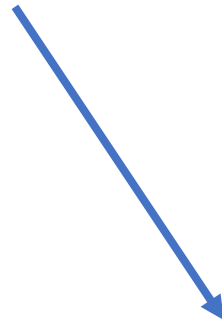
Remember, vendors are busy!!!

Q's from Vendors

vs.

Content in RFP

7. Is there a defined budget for this project that you can share?



BUDGET

The Client's anticipated spend for the EAM Software Product is \$150,000 per year.

We are currently budgeting around \$200,000 across 2024 and 2025 for one-time implementation services.

Remember, vendors are busy!!!

Q's from Vendors

vs.

Content in RFP

13. In the pre-bid meeting they said the presentations will be the week of August 14th in the morning. Will the presentations be in person or virtual?



ACTIVITY	DATE & LOCAL TIME
Virtual Software Demonstrations (shortlisted Offerors only)	Morning Timeslots on Aug 14, 15 & 16

DEMONSTRATION

Venue: The Presentations and Demos will be conducted virtually via Microsoft Teams.

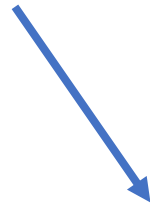
Remember, vendors are busy!!!

Q's from Vendors

vs.

Content in RFP

1. What is the expected Go Live date?



SCHEDULE

The following timeline is expected:

- The goal is to award a contract starting in early 2024.
- 5-year contract for Asset Management Software with optional renewals.
- Implementation to start in early 2024 and be completed sometime in 2025 as mutually agreed upon.

Summary:

Challenges

1. SOWs that are too long & detailed
- 2.
- 3.

Best Practices

- 1.
- 2.
- 3.

Summary:

Challenges

1. SOWs that are too long & detailed
- 2.
- 3.

Best Practices

1. Carefully select mandatory vs. desired requirements
- 2.
- 3.

Tip#1: Focus on Goals & Current Conditions

Largest Bookstore Contract in History – less than 8 page SOW

PROGRAM AND SERVICE EXPECTATIONS

The ASU Bookstores are the only official bookstores of Arizona State University and are owned and operated directly by the University. All revenues generated by the bookstores are put back into the University. The ASU Bookstores have new and used textbooks, school supplies, ASU apparel and gifts, new and used general and reference books, art and technical supplies, calculators, electronics, computers, and more. The ASU Bookstores offer convenient one-stop shopping on all four campuses allowing students to buy books, supplies and anything else they need for school. The Bookstores accept cash, personal checks, Sun Dollars (deposits to identification card accounts), Visa, MasterCard, American Express, Discover, Bookstore gift cards, University P-Cards, Bookstore order forms, internal Purchase Orders, as well as financial aid checks.

Existing services include:

- Year-round textbook buyback
- Computer hardware, software and accessories
- Gift certificates
- Extended hours at the beginning of each semester
- Custom graduation announcements
- Graduation caps and gowns
- Class rings
- Thesis and dissertation binding

- support and extend University branding strategies
- promote sales of new and used textbooks, including a buyback program
- support a financially sustainable textbook rental program
- sell and support computer hardware, software and accessories
- support the University Faculty and Staff
- support graduation (gowns, announcements, rings etc.)
- offer supplies to support the different programs on campus (for example: art, architectural, engineering, math, and general schools supplies)
- provide reference books including but not limited to medical, nursing, engineering, etc.
- dominate the local ASU market, including textbooks, trade books and related soft goods
- convince departments and colleges to use their services instead of alternatives driven by product and service superiority
- achieve world class supplier diversity spend
- develop and operate facilities with features that make them an attractive customer destination rather than simply a place to buy course materials
- work with existing University contractors and service providers to build complementary programs for mutual benefit
- maintain value pricing and keep textbook prices as low as possible
- maintain a high level of service and provide requested low margin or no margin services

5.2 Management Expectations

5.5 Measurement of Performance and Cost
Vendor shall develop and maintain a system of measurement for performance and cost, with performance measurements of Sales, Service, and Student satisfaction. The objective is to show through measurement that ASU is a leader in providing bookstore services.

5.6 Additional Information. The University issued a Request for Information (RFI) on June 18, 2010 to assist in the development of the highest possible quality Request for Proposal (RFP). From that RFI, the following questions were submitted.

5.6.1 What are the net sales for fiscal years ending June 2009, June 2010, and budgeted for June 2011?

Net Sales	FY 2009	FY 2010	FY 2011
New Textbooks	\$16,320,363	\$17,163,573	\$16,889,000
Used Textbooks	7,727,744	6,954,839	7,225,000
General Books	313,094	225,847	229,800
Supplies	1,642,656	1,329,131	1,259,300
Insignia	5,226,694	3,990,767	3,876,100
Misc & Other	950,943	739,839	919,400
Computer Products	6,833,387	7,904,572	8,052,100
Total Revenue	\$39,014,881	\$38,308,568	\$38,450,700

- 5.6.2 What is the retail value of inventory as of June 20, 2010? \$8,536,497
- 5.6.3 What percentage or dollar amount of sales are ordered online?

FY 2009/2010		
InSite Sales		\$3,362,899
(includes all stores and pay at store)		
Textbook Sales		\$2,813,078
(includes New, Used, and Digital – this is 12% of all textbook sales)		
Merchandise, Apparel and Supplies		\$398,512

Note: this does not include Text Reservations

5.6.4 Please describe any current ASU textbook initiatives and/or requirements. The ASU Bookstores carry both new and used copies of required, recommended, and optional textbooks regardless of publisher restrictions. Additionally, 1) the ASU Bookstore has partnered with a company to provide price comparison on our web site. Students are able to compare prices and purchase books from the ASU Bookstore or any of the comparison sites right from the store's site; 2) textbook rental options mentioned above; 3) textbook best price guarantee; 4) Campus Marketplace peer-to-peer textbook selling. The ASU Bookstore provides an

online marketplace service for students to sell to their bookstore now provides a gift registry on the store web site; 6) store and online, as well as the end-of-term buyback; 7) it supports the Arizona Board of Regents' textbook initiative to as possible, i.e., when possible we sell the components separat the provost office to ensure the expeditious adoption submit Bookstore works with the financial aid office to allow students aid to get their textbooks on an agreed upon payment option.

- 5.6.5 What percentage of textbooks sold are used? We achieve a ratio.
- 5.6.6 What is the new textbook gross margin formula (i.e. cost/0.75) increase for custom and/or bundled textbooks? The bookstore margin formula of (cost/79). At this time there is no margin in and/or bundled textbooks.
- 5.6.7 During textbook buyback, what price (as a percent of selling) for titles being used in an upcoming term? 50% of the regardless of if they purchased the book new or used.
- 5.6.8 Does the bookstore work with eBook vendors such as **Cour** sell 500-600 e-titles every semester predicated upon what titles adopted.
- 5.6.9 Provide rentals availability for percentage of titles. The currently running two (2) complimentary rental programs consist an in-store program through our MBS partnership that has 200+ for students. This translates to 1.6% of all titles. We also have Booksrenters.com to provide online rentals. Booksrenters.com (3) million titles in their inventory.
- 5.6.10 How many online sales are picked up locally in the store and in dedicated pick up area? All text reservations and other orders are stores from a dedicated pick up area.
- 5.6.11 How are Distance Learning materials provided? The ASU Bookstore materials for the MBA online programs and other Internet online have shipping operations at all campus stores so when an order particular campus, through our website solution, the store on the fulfill the order. We have partnered with FedEx for prompt efficient
- 5.6.12 What are the current purchase discounts? The ASU Book Faculty/Staff/Departmental/Alumni discount of ten percent (10% discount is offered for quantity orders and special events. Annual of approximately \$523,000.
- 5.6.13 Please provide any additional details on general books, such as sales the campus. 1) The ASU Bookstore is heavily invested and support general book needs including author signings and events on all throughout the Phoenix area. The ASU Bookstore provides staff retail services for each of the events regardless of potential sales year, the ASU Bookstore did over 60 of these sales. 2) The ASU operates a week long offsite "bookstore" for the Virginia Conference. 3) The ASU Bookstore supports various other book Crow's lecture circuit. 4) The ASU Bookstore conducts several sales at each campus. The store also promotes discounts on through the year.

- 5.6.14 Are there restrictions on sales in the bookstores? Yes. Convenience food and drink product are not to compete with Aramark and convenience stores. The ASU Bookstore is not to compete with campus UPS products at Hassayampa and PV East, W.P. Carey and Ira Fulton School of Engineering products, Canon print and copy services. The ASU Bookstore cannot compete with ICA games and athletic event product at the stadium and athletic venues.
- 5.6.15 In order to accurately evaluate the sales to square foot ratios, could you indicate if there has been any limitation within the store in the past – such as general merchandise selection – due to local competition? Private Enterprise restrictions have been softened. Merchandise selection is determined by customer need and desire and prioritized by space availability.
- 5.6.16 What is the approximate square footage of each current bookstore?

Tempe Campus	40,000 sq ft	22,000 retail – 18,000 storage and office
Downtown Phoenix Campus	4,280 sq ft	3,950 retail – 330 storage and office
Polytechnic Campus	4,050 sq ft	3,150 retail – 900 storage and office
West Campus	8,045 sq ft	6,305 retail – 1,740 storage and office
Computer Store	1,950 sq ft	1,700 retail – 250 office

- 5.6.17 During non-rush periods, does the University reconfigure the space? Yes.
- 5.6.18 Are the existing bookstore fixtures owned by the University? Yes.
- 5.6.19 What are the number of POS registers used per store during the first week of class? 38 total

Administrative Service Fee	477,319
Credit Card Fees	570,447
Total Operating Expenses	\$1,878,084

- 5.6.33 Please provide unrestricted annual and/or one-time donations. Approximately \$143,000 in donations and scholarships are funded by the ASU Bookstore.
- 5.6.34 Please provide an organizational chart showing management structure. Refer to Exhibit 1.

- 5.6.24 What type of computer inventory is kept on campus for immediate purchase? Approximately 500 – 1000 CPUs.
- 5.6.25 Does the University recommend brands and models? Yes, Apple and Dell laptops.
- 5.6.26 Does the bookstore computer store sell to institutional customers/departments (via department Pos or requisitions) or just to individual faculty, students, and staff using their own individual form of payment. If to both, can you estimate the sales ratio to individual purchases? The ASU Bookstore sells to departments (35% institutional) and individuals (65% personal).
- 5.6.27 Are there any mandatory student computer purchase programs in place either for individual departments/schools or campus-wide? The College of Business MBA Executive Program has a mandated policy.
- 5.6.28 Do individual departments/schools develop minimum and/or preferred computer specifications that the bookstore promotes/supports in their selling efforts? Yes, the College of Law, the College of Business, the School of Engineering, and ASU 1.1.
- 5.6.29 Is the Technology Studio (repair service) affiliated with the bookstore? The Technology Studio is not a repair service facility. It is not affiliated with the ASU Bookstore, the University Technology Office operates it. The ASU Bookstore operates the Apple and Dell Warranty Service and Repair Programs in the Computer Commons Building.
- 5.6.30 Please describe the web affiliate program. The Apple Affiliate program pays the ASU Bookstore two percent (2%) of sales linked from our site to Apple online. ASU Bookstore pays two percent (2%) of 1:1 Programs sales to ASU UTO.
- 5.6.31 What is the retail relationship/partnership between the bookstore and the Athletic department? ICA contracts the Team Shop, athletic event sales and their website to outside vendors. The ASU Bookstore offers game day concessions/sales at non-stadium locations, through our website and on-campus stores, and we partner with the Alumni Association and others which support athletics in campus wide endeavors and programs, i.e. Go Gold.

5.6.35 Please provide employee salary information.

Fiscal Year 2010	
Full-time Salaries	\$2,756,349
Student/Temporary Wages	\$1,073,630
Total Personnel Expenses	\$3,829,979

- 5.6.36 Please list ASU Bookstore benefits information. This information can be found at <http://cfo.asu.edu/hr-benefits>
- 5.6.37 Are there currently any classified/union ASU Bookstore employees? All ASU Bookstore employees are State Employees.
- 5.6.38 Can the University identify specific enrollment information and desired bookstore support for the campus expansion plans in the next ten (10) years? No.
- 5.6.39 Provide enrollment data for Fall 2009 and Fall 2010.
Fall 2009 – 68,064 head count
Fall 2010 – 70,400 head count
- 5.6.40 Describe the University's plans for enrollment growth and any pedagogical or major curriculum/academic program changes. The University plans to grow to 85,000 students by 2018. We also plan on growing our University On-Line Program from 3,000 students to 30,000 students by 2018.
- 5.6.41 Are there any initiatives with the Arizona University System that vendors should be aware of? No, not at this time.
- 5.6.42 Does the bookstore have integration into the registration system? Yes, on two different levels. Class registration size and actual class enrollment information to enable course materials orders and integration to enable posting information for HEOA requirements.
- 5.6.43 Please provide any information regarding faculty behaviors such as: compliance to adoption dates, adoption process, faculty relationships with publishers, and special needs/challenges. ASU Faculty are leaders and experts in their field of instruction and research. The University and the ASU Bookstore cater to their needs and work to extend service to assist them in achieving their mission.



Programmatic Goals

1. achieve world class customer satisfaction
2. provide capacity for growth of student population and program expansion
3. offer market-competitive pricing
4. drive an increase in sales annually
5. make significant investment in facilities and program
6. provide a significant financial return to the University
7. facilitate a growing online sales volume
8. provide innovative solutions to problems
9. provide Community outreach and contribute to University spirit
10. continue to support University sustainability efforts
11. support the Athletics department
12. support and extend University branding strategies
13. promote sales of new and used textbooks, including a buyback program
14. support a financially sustainable textbook rental program
15. sell and support computer hardware, software and accessories
16. support the University Faculty and Staff
17. support graduation (gowns, announcements, rings etc.)
18. offer supplies to support the different programs on campus (for example; art, architectural, engineering, math, and general schools supplies)
19. provide reference books including but not limited to medical, nursing, engineering, etc.
20. dominate the local ASU market, including textbooks, trade books and related soft goods
21. convince departments and colleges to use their services instead of alternatives driven by product and service superiority
22. achieve world class supplier diversity spend
23. develop and operate facilities with features that make them an attractive customer destination rather than simply a place to buy course materials
24. work with existing University contractors and service providers to build complementary programs for mutual benefit
25. maintain value pricing and keep textbook prices as low as possible
26. maintain a high level of service and provide requested low margin or no margin services

Other Goals

Management Expectations

1. A Bookstore Manager that is a leader in the Bookstore management field that offers a best practices approach to implementation and delivery, and views the University as a flagship account and an incubator for new programs, technology, services, and management strategies.
2. A management team that is the best in the field, and one that is exceptionally knowledgeable, experienced, competent and professional in managing all aspects of a large and diverse university academic environment. The management team should be collaborative and collegial with ASU and key customer stakeholders.
3. A seamless interface with University systems where necessary.
4. Ongoing, proactive business development and program growth and evolution.

Human Resources Expectations

1. That current ASU Bookstore employees will be retained for a period of two (2) years from the beginning date of the contract.
2. Wage, benefits and human resource practices that conform to the University's Values Based Standards for Business Relationships With Significant University Service Providers (see policy here...)

Other Goals

Financial Expectations

1. A fair and balanced compensation agreement that supports both the Proposer and the University in meeting their respective financial objectives.
2. Compensation to the University sufficient to cover the University's direct and indirect costs and provide funding for future growth.
3. A vendor-contributed capital investment plan designed to support the capital development needs over the life of the contract.

Measurement of Performance and Cost

1. Vendor shall develop and maintain a system of measurement for performance and cost, with performance measurements of Sales, Service, and Student satisfaction. The objective is to show through measurement that ASU is a leader in providing bookstore services.

Rest = Current Conditions

5.6.1 What are the net sales for fiscal years ending June 2009, June 2010, and budgeted for June 2011?

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New Textbooks	\$16,320,363	\$17,163,573	\$16,889,000
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West Campus	8,045 sq ft	6,305 retail – 1,740 storage and office
Computer Store	1,950 sq ft	1,700 retail – 250 office

5.6.19 What are the number of POS registers used per store during the first week of class? 38 total

Tempe Campus	21	8 (after rush)
Downtown Phoenix Campus	5	3 (after rush)
West Campus	6	5 (after rush)
Polytechnic Campus	6	4 (after rush)

5.6.32 What are the current Operating Expenses for Fiscal Year 2010?

Operating Expenses FY 2010	
Services	\$226,968
(RMSA, Risk Mgmt, Repairs, Maintenance, Printing, Security, DPS, others)	
Advertising	110,797
Supplies	177,420
Non-Capital Equipment	28,358
Communications/Postage	58,253
Equipment Rent	7,890
Building Rent	80,708
Utilities	88,722
Miscellaneous Expenses	51,202
Administrative Service Fee	477,319
Credit Card Fees	570,447
Total Operating Expenses	\$1,878,084

Tip#1: Focus on Goals & Current Conditions

In Summary:

- Start with your Current Conditions & constraints (90% effort)
- Then add your goals/objectives (remaining %)

Beware:

- Vendors will still ask: *“What do you want me to do?”*
- Never say HOW they should do their job.

Summary:

Challenges

1. SOWs that are too long & detailed
- 2.
- 3.

Best Practices

1. Carefully select mandatory vs. desired requirements
- 2.
- 3.

Summary:

Challenges

1. SOWs that are too long & detailed
2. Purposely omitting key information
- 3.

Best Practices

1. Carefully select mandatory vs. desired requirements
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SOW Challenge #2: Omitting Key Info

Ex: Professional Services, client team refused to provide the schedule duration

SOW Challenge #2: Omitting Key Info

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	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5	Vendor 6	Vendor 7	Vendor 8	Vendor 9
Price	\$1.7M	\$1.4M	\$1.8M	\$1.0M	\$1.1M	\$1.4M	\$1.4M	\$1.1M	\$1.2M

SOW Challenge #2: Omitting Key Info

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	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5	Vendor 6	Vendor 7	Vendor 8	Vendor 9
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- Range from \$1.0M to 1.8M = 80% difference!

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Price	\$1.7M	\$1.4M	\$1.8M	\$1.0M	\$1.1M	\$1.4M	\$1.4M	\$1.1M	\$1.2M
Total Points	46.3	81.0	44.9	82.5	73.3	85.6	68.4	85.9	71.8

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- Vendor 8 was 27% cheaper than Vendor 6

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- Range from \$1.0M to 1.8M = 80% difference!
- Vendor 8 was 27% cheaper than Vendor 6
 - Price was worth 25 points, so 27% difference ~ 6 or 7 points (pro-rated)

SOW Challenge #2: Omitting Key Info

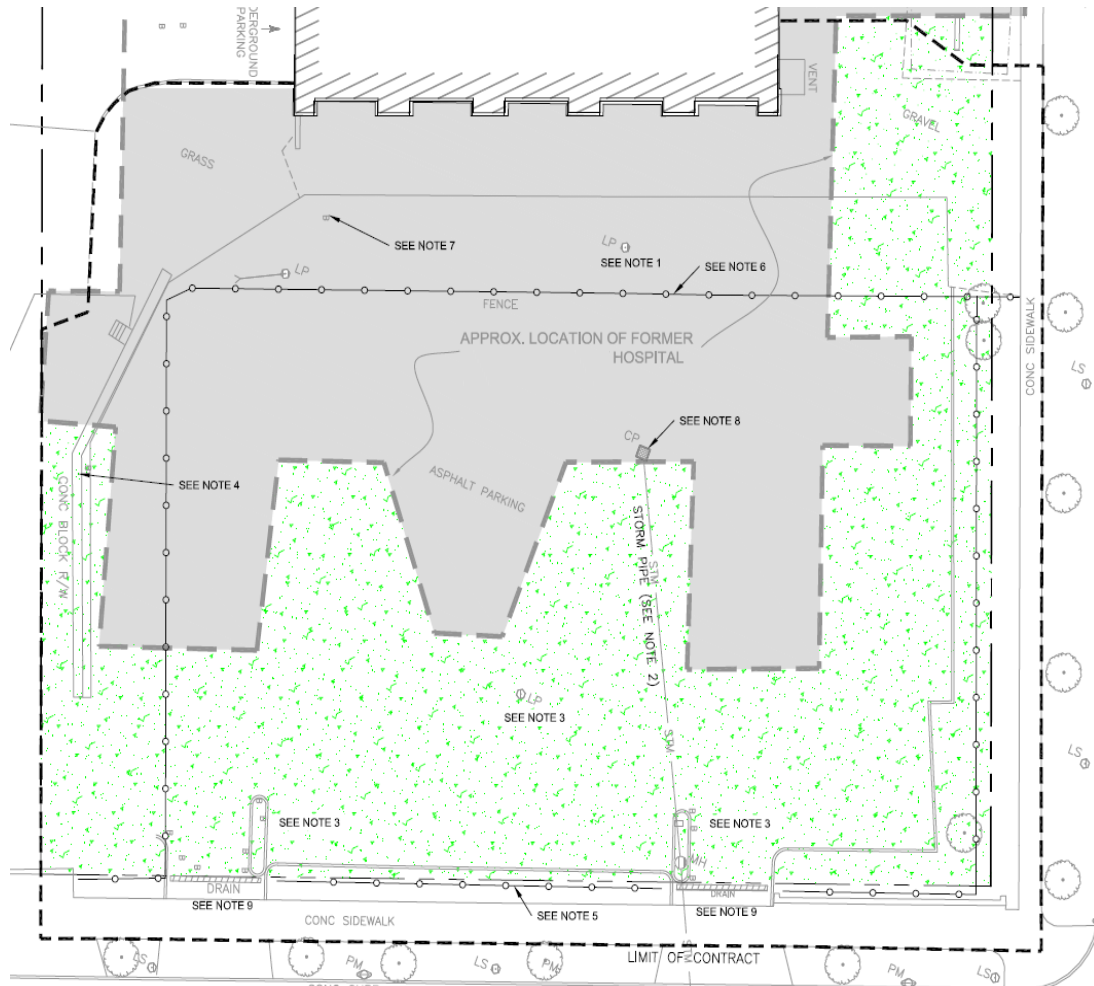
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Total Points	46.3	81.0	44.9	82.5	73.3	85.6	68.4	85.9	71.8

- Range from \$1.0M to 1.8M = 80% difference!
- Vendor 8 was 27% cheaper than Vendor 6
 - Price was worth 25 points, so 27% difference ~ 6 or 7 points (pro-rated)
 - **Why? Vendor 8 assumed a shorter schedule by more than 6mo**

SOW Challenge #2: Omitting Key Info

Ex: Site Remediation



SOW Challenge #2: Omitting Key Info

Ex: Site Remediation



SOW Challenge #2: Omitting Key Info

Ex: Site Remediation



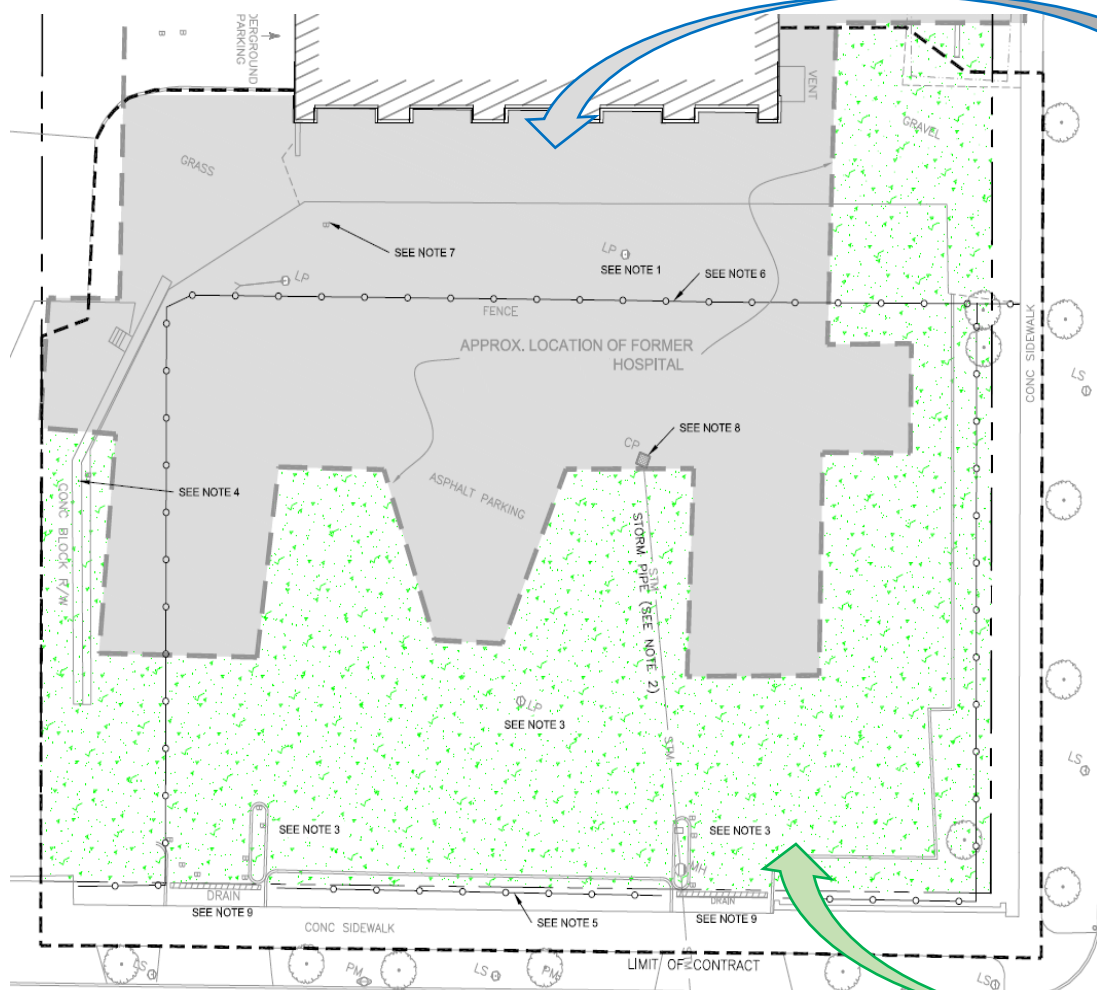
SOW Challenge #2: Omitting Key Info

Ex: Site Remediation



SOW Challenge #2: Omitting Key Info

Ex: Site Remediation



“Silt and sand soil, mixed with debris from the demolition of the hospital, and often underlain by a concrete slab or footings ranging from 1.8 to 3m thick.”

Contaminants: petroleum hydrocarbons, metals (arsenic, lead & iron), PAHs, & asbestos-containing materials, etc.

➤ No benchmark to propose to...

(Contractors caught between a “no bid”
or adding contingency for unknowns)

“Primarily dark brown/grey silty sand with gravel.”

SOW Challenge #2: Omitting Key Info

Ex: Site Remediation

1. Replace Pricing Table in Proposal Summary Form with the following:

Item	Description	Unit of Measure	Estimated Quantities	Total Lump Sum Price
1	Base Bid (Section 31 23 33.01, Clause 34.2.1) to excavate, remove and dispose of 400 m ³ of asphalt, 2,800 m ³ of in situ Type FD material and 350 m ³ of in situ concrete material	Lump Sum	<ul style="list-style-type: none"> 400 m³ asphalt 2,800 m³ Type FD 350 m³ concrete 	\$
TOTAL PRICE (excluding HST):				\$
2	Unit price (Section 31 23 33.01, Clause 34.2.1) of removal and disposal of in situ Type FD material for credit or extra to contract lump sum estimated quantity	Unit price per ton	1 tonne	\$
3	Unit price (Section 31 23 33.01, Clause 34.2.1) of excavation, removal and disposal of in situ concrete material for credit or extra to contract lump sum	Unit price per ton	1 tonne	\$

Set a Benchmark to Propose to!!!!

- Ensure proposals are apples-to-apples (**as much as possible**)

EXAMPLE

Question: What is the existing water pressure?

Set a Benchmark to Propose to!!!!

- Ensure proposals are apples-to-apples (**as much as possible**)

EXAMPLE

Question: What is the existing water pressure?

Answer:

For the purposes of the proposal, Proposers should assume that the existing water pressure is adequate. The waterline (described in RFI #4) is the main line for the CLIENT's main building and currently cover all fire suppression and other needs.

Set a Benchmark to Propose to!!!!

- Ensure proposals are apples-to-apples (**as much as possible**)

- This is the answer to...

“How do I know if I am too Open-Ended?”

- *If you've established a solid benchmark to bid to...*
- *... you have probably provided “enough” Scope info to avoid being open-ended.*

Summary:

Challenges

1. SOWs that are too long & detailed
2. Purposely omitting key information
- 3.

Best Practices

1. Carefully select mandatory vs. desired requirements
- 2.
- 3.

Summary:

Challenges

1. SOWs that are too long & detailed
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Best Practices

1. Carefully select mandatory vs. desired requirements
2. Focus on Current Conditions + Overall Goals/Objectives/Outcomes
- 3.

Tip#2: Balance the Mandatory vs Desired Reqs

Question:

How to distinguish the difference between what should be a mandatory qualification and what should be a desirable?

Answer:

A requirement is mandatory if you wouldn't even consider the proposer for missing that 1 item.

Examples:

Recent EAM Software:

- 4 Mandatory vs. 100 Desired

Recent ERP Software

- 53 Mandatory vs. 295 Desired
- (6x larger than the prior example, which had 1,000+ reqs!)

Mandatory Requirement

- 12ft diameter boring job, 8 miles long, 60ft below surface

Mandatory Requirement:

- Work on a similar project in the last 5 years in < state >

Questions to ask:

- How many borings like this happen per year in the state?
- How many vendors might be qualified?
- Is this project more/less complex than the typical boring project in the state?

Major Overhaul for a Power Plant (Minimum Qualifications)

- Minimum 10 years experience
- At least 10 projects in Design-Build (DB) contracts.
- Experience in working on behalf of both owners and DB contractors.
- Minimum of 5 DB projects in [specific State]
- Must have completed 1 DB project working on behalf of a public owner.
- Have completed 1 DB project that was not new construction, but was a refurbishment, remodel, or addition in a secure operating facility.
- And more...

Tip#2: Balance the Mandatory vs Desired Reqs

- When in doubt, the answer is to ***not*** make a requirement mandatory!

Summary:

Challenges

1. SOWs that are too long & detailed
2. Purposely omitting key information
- 3.

Best Practices

1. Carefully select mandatory vs. desired requirements
2. Focus on Current Conditions + Overall Goals/Objectives/Outcomes
- 3.

Summary:

Challenges

1. SOWs that are too long & detailed
2. Purposely omitting key information
3. Over-specifying means & methods

Best Practices

1. Carefully select mandatory vs. desired requirements
2. Focus on Current Conditions + Overall Goals/Objectives/Outcomes
- 3.

SOW Challenge #3: Over-Specifying Means & Methods

SOW Challenge #3: Over-Specifying Means & Methods

Ex: Waste Hauling



- “An adequate fleet of collection vehicles should be used and maintained by the Proposer...”
- “It is the [Owner’s] expectation that collection vehicles designated for service should at a **minimum be less than two years old at the start of the contract**”

SOW Challenge #3: Over-Specifying Means & Methods

Ex: Waste Hauling



- “In order to support accurate measurements towards the [Client’s] sustainability goals, all vehicles must be solely dedicated to [the Client] and cannot be used for other sites.”

SOW Challenge #3: Over-Specifying Means & Methods

Ex: Waste Hauling



- Average Proposal Price: +46% over the Budget
- Maximum Proposal Price: +106% Over the Budget
- Scope was put together with great intentions
 - Seeking high quality services & impressive sustainability goals.
- **Over-emphasis on the inputs (restricting Proposer means & methods) can detract from the outcomes (results)!**

Waste Hauling Scope

5,000+ tons of waste collection across urban area



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- Maximum Proposal Price: +106% Over the Budget
- Scope was put together with great intentions
 - Seeking high quality services & impressive sustainability goals.
- Over-emphasis on the inputs (restricting Proposer means & methods) can detract from the outcomes (results)!

Elevator Maintenance (campus-wide)



- The Proponent shall assign a **dedicated maintenance technician** to this contract.
- This individual must be **solely assigned** to this contract and will perform all preventative maintenance & major repairs within the building zone.
- **Over-emphasis on the inputs (Proposer resources) can detract from the outcomes (results)!**

Impact of Overly Prescriptive Scope

- Can significantly increase cost & schedule
 - Removes flexibility to offer strategies & innovations for the specific environment
 - “tie the hands” of Proposers regarding the work and manner in which it is undertaken
 - Limits the maximum accountability & responsibility Proposers have to perform
- **Brings Risk to the Project!**

Summary:

Challenges

1. SOWs that are too long & detailed
2. Purposely omitting key information
3. Over-specifying means & methods

Best Practices

1. Carefully select mandatory vs. desired requirements
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Summary:

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1. SOWs that are too long & detailed
2. Purposely omitting key information
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Best Practices

1. Carefully select mandatory vs. desired requirements
2. Focus on Current Conditions + Overall Goals/Objectives/Outcomes
3. In special circumstances, you can use a “Vendor Generated Solution”

Tip#3: Proposal Alternates & VGS

Tip#3: Proposal Alternates & VGS

- Set the Baseline SOW for the RFP competition (apples-to-apples)
 - Assume X → propose what is best?
- Then provide 1-2 optional scenarios
 - Assume Y → now propose what is best?
 - Open-Ended → propose what is best overall?

Example: Public-Private-Partnership for Student Residence

Base Case

(30yr, 250 beds, pre-set financials)

Option 2

(Open Term, 250 beds, pre-set financials)

Option 3

(Wide Open)

SUBMITTAL FORM H-1

Financial Proposal Option 1 = 30 Year Term

Requirements:

- Proposer must accommodate the Student Housing Building as described in Section 2 – Scope of Work, which includes 250 beds with room configurations as described.
- Ownership of the facility transfer to KCKCC upon conclusion of the lease.
- Please use this form and do not add additional information.

Term:

Please complete this submittal based on the following lease term	30 years
--	-----------------

Proposed Investment:

Total Minimum Guaranteed Financial Investment	\$ Lump Sum
Total Initial Construction Value of the Investment (excludes all costs and fees associated with design, development, or any other costs that are not directly applicable to the construction)	\$ Lump Sum

Anticipated Facility Parameters:

Total Square Footage (all floors and program)	# SF
Total Square Footage for Living Space (includes all space behind a Living Unit entry door including bedroom, kitchen, living space, bathroom, etc. and does not include common spaces, hallways, etc.)	% of Total SF

Proposed Annual Lease Rate:

Year	Lease Rate	Year	Lease Rate	Year	Lease Rate
1	\$	11	\$	21	\$
2	\$	12	\$	22	\$
3	\$	13	\$	23	\$
4	\$	14	\$	14	\$
5	\$	15	\$	25	\$
6	\$	16	\$	26	\$
7	\$	17	\$	27	\$
8	\$	18	\$	28	\$
9	\$	19	\$	29	\$
10	\$	20	\$	30	\$

SUBMITTAL FORM H-2

Financial Proposal Option 2 = Term Recommended by Proposer

Requirements:

- Proposer must accommodate the Student Housing Building as described in Section 2 – Scope of Work, which includes 250 beds with room configurations as described.
- Ownership of the facility transfer to KCKCC upon conclusion of the lease.
- Please use this form and do not add additional information.

Term:

The Proposer recommends the following lease term	# years
--	----------------

Proposed Investment:

Total Minimum Guaranteed Financial Investment	\$ Lump Sum
Total Initial Construction Value of the Investment (excludes all costs and fees associated with design, development, or any other costs that are not directly applicable to the construction)	\$ Lump Sum

Anticipated Facility Parameters:

Total Square Footage (all floors and program)	# SF
Total Square Footage for Living Space (includes all space behind a Living Unit entry door including bedroom, kitchen, living space, bathroom, etc. and does not include common spaces, hallways, etc.)	% of Total SF

Proposed Annual Lease Rate:

Please adjust the table based on the number of years for the lease term recommended by the Proposer.

Year	Lease Rate	Year	Lease Rate	Year	Lease Rate
1	\$	11	\$	21	\$
2	\$	12	\$	22	\$
3	\$	13	\$	23	\$
4	\$	14	\$	14	\$
5	\$	15	\$	25	\$
6	\$	16	\$	26	\$
7	\$	17	\$	27	\$
8	\$	18	\$	28	\$
9	\$	19	\$	29	\$
10	\$	20	\$	30	\$

SUBMITTAL FORM H-3

Financial Proposal Option 3 = Proposer Created Solution

Requirements:

- No requirements for length of term nor scope of work.
- Must complete the table information below. Cannot exceed **3 pages maximum**.
- This Submittal is optional and is not evaluated.

Narrative of Optimal Financial Model:

Add space as needed

Optimal Term:

The Proposer recommends the following lease term as being optimal	# years
---	----------------

Optimal Investment:

Total Minimum Guaranteed Financial Investment	\$ Lump Sum
Total Initial Construction Value of the Investment (excludes all costs and fees associated with design, development, or any other costs that are not directly applicable to the construction)	\$ Lump Sum

Optimal Facility Parameters:

Minimum Guaranteed Number of Beds	# beds
Total Square Footage (all floors and program)	# SF
Total Square Footage for Living Space (includes all space behind a Living Unit entry door including bedroom, kitchen, living space, bathroom, etc. and does not include common spaces, hallways, etc.)	% of Total SF

Optimal Annual Lease Rate:

Please adjust the table based on the number of years for the lease term recommended by the Proposer.

Year	Lease Rate	Year	Lease Rate	Year	Lease Rate
1	\$	11	\$	21	\$
2	\$	12	\$	22	\$
3	\$	13	\$	23	\$
4	\$	14	\$	14	\$
5	\$	15	\$	25	\$
6	\$	16	\$	26	\$
7	\$	17	\$	27	\$
8	\$	18	\$	28	\$
9	\$	19	\$	29	\$
10	\$	20	\$	30	\$

Tip#3: Proposal Alternates & VGS

SUBMITTAL FORM H-3

Financial Proposal

Option 3 = Proposer Created Solution

Requirements:

- No requirements for length of term nor scope of work.
- Must complete the table information below. Cannot exceed 3 pages maximum.
- This Submittal is optional and is not evaluated.

Narrative of Optimal Financial Model:

Add space as needed

Optimal Term:

The Proposer recommends the following lease term as being optimal	# years
---	---------

Optimal Investment:

Total Minimum Guaranteed Financial Investment	\$ Lump Sum
Total Initial Construction Value of the Investment (excludes all costs and fees associated with design, development, or any other costs that are not directly applicable to the construction)	\$ Lump Sum

Optimal Facility Parameters:

Minimum Guaranteed Number of Beds	# beds
Total Square Footage (all floors and program)	# SF
Total Square Footage for Living Space (includes all space behind a Living Unit entry door including bedroom, kitchen, living space, bathroom, etc. and does not include common spaces, hallways, etc.)	% of Total SF

Optimal Annual Lease Rate:

Please adjust the table based on the number of years for the lease term recommended by the Proposer.

Year	Lease Rate	Year	Lease Rate	Year	Lease Rate
1	\$	11	\$	21	\$
2	\$	12	\$	22	\$
3	\$	13	\$	23	\$
4	\$	14	\$	14	\$
5	\$	15	\$	25	\$
6	\$	16	\$	26	\$
7	\$	17	\$	27	\$
8	\$	18	\$	28	\$
9	\$	19	\$	29	\$
10	\$	20	\$	30	\$

Can be structured

and/or

Wide Open

4.0 Price Option D: Alternative Proponent Generated Solution (optional)

4.1 Use the space below to provide a Narrative of the Optimal Financial Agreement to meet the base specifications and scope of services as described in the RFP (Cannot exceed Two (2) Pages). Proponents may provide this Alternative Solution for both University Travel (including Group Travel) and/or the Athletics Fee model. The alternative solution shall identify clearly as to whether there is any deviation in the pricing should Athletics not be awarded.

- 4.1.1 At a minimum, Proponents must address the following in their Price Option D submission:
- .1 Pricing Structure for all Travel Management Services (may or may not include Athletics Travel)
 - .2 Optimal Contract Length
 - .3 Identify any significant changes to roles and responsibilities that are different from the traditional model provided in the Scope of Services.

Add Space as Needed (2 page maximum):

Summary:

Challenges

1. SOWs that are too long & detailed
2. Purposely omitting key information
3. Over-specifying means & methods

Best Practices

1. Carefully select mandatory vs. desired requirements
2. Focus on Current Conditions + Overall Goals/Objectives/Outcomes
3. In special circumstances, you can use a “Vendor Generated Solution”

Summary:

Challenges

1. SOWs that are too long & detailed
2. Purposely omitting key information
3. Over-specifying means & methods

Best Practices

1. Carefully select mandatory vs. desired requirements
2. Focus on Current Conditions + Overall Goals/Objectives/Outcomes
3. In special circumstances, you can use a “Vendor Generated Solution”
4. Use the RFN when you don't know where to start!

What to do when you
don't know where to start

SOW Objective

What would a High-Performing Vendor want to know?

ALWAYS question whether the SOW....

- Prevents vendors from **walking away**?
- Allows vendors to provide the **best price**?
- Gives vendors **information to plan** their approach?
- Enables vendors to **minimize contingency**?

One Of The Greatest Challenges In Any Procurement Is Preparing The “Statement of Work”

SOW

- Expectations
- Requirements
- Objectives
- Constraints
- Existing Conditions



Solicitation

RFP

Contents

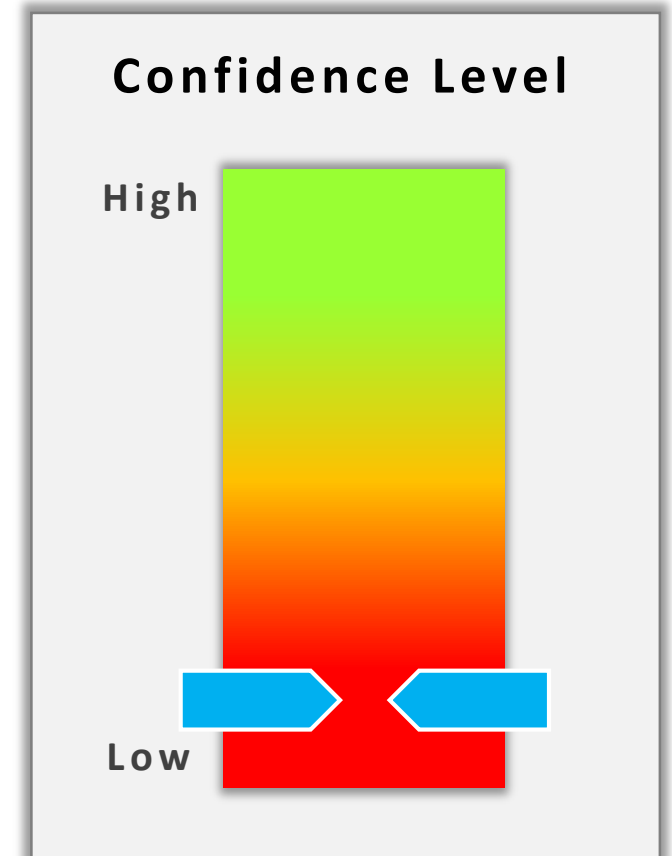
- Section 1 Scope of Work
- Section 2 Evaluation Criteria and Procedures
- Section 3 Administrative Requirements
- Section 4 Submittal Forms & Exhibits

What If...

- **Client has never procured the project before?**
- **Client is unsure what to include in the SOW (and what not to include)**
- **Client is unsure what vendors need to accurately price?**
- **Client is unsure the best approach to take?**
- **Client is unsure if any vendors can do all the work?**

SOW Confidence Index

- Where do you start?
- How do you know what to put in the SOW?
- What does not need to put in the SOW?
- How much background information to include?
- What background information do they need?



Creating the SOW: **which projects are most difficult?**

Traditional Definition of Market Research

- Examining available sources to gathering information about your project and it's market environment:
 - Find available goods, services, and sources of supply which might meet your needs
- Provides information that is critical to developing effective **procurement strategies**.

Simple Solution

**Simple
Solution**

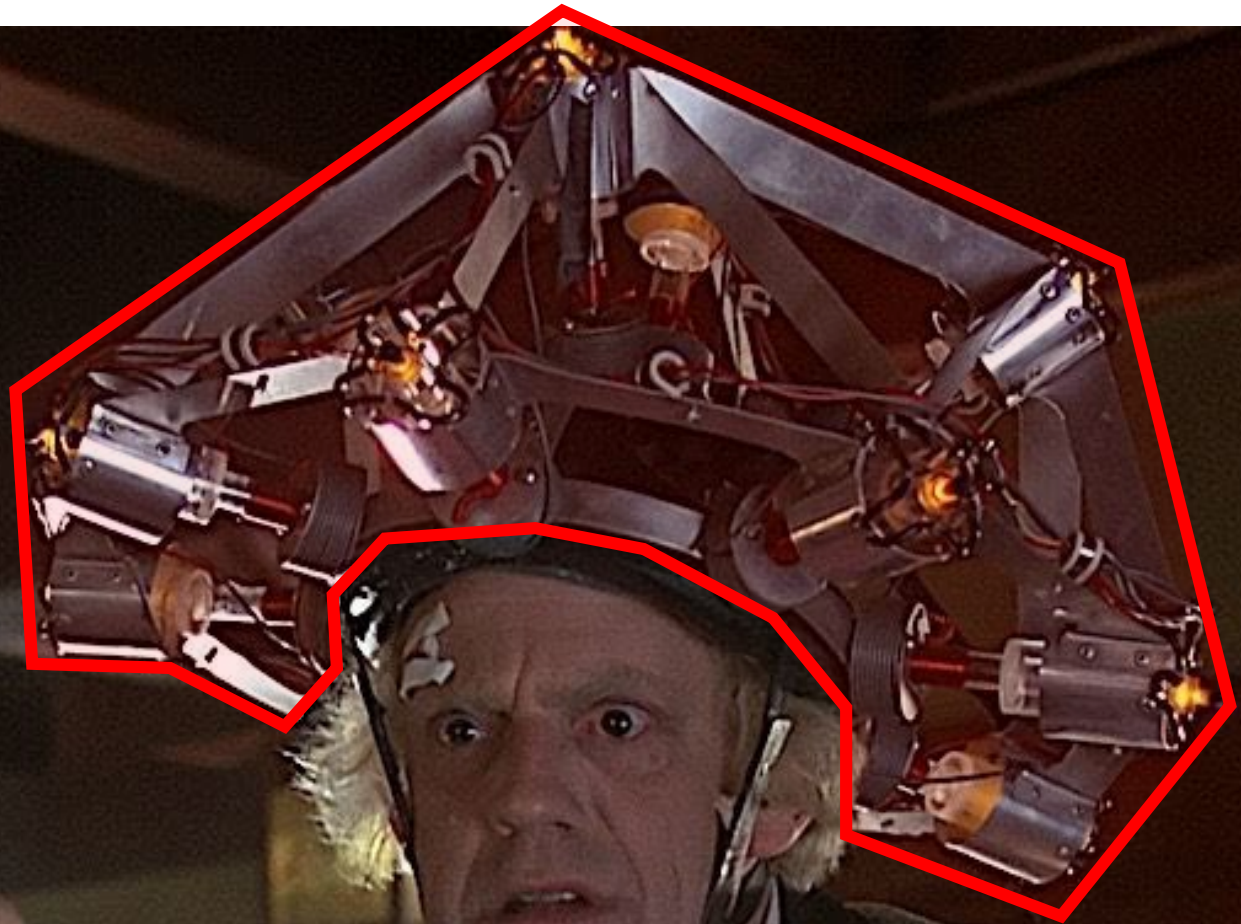


**Ask Your
Suppliers!**





*Procurements
would be much
easier!!!*



REMEMBER THIS!!!

Core Objective: What would a **High-Performing Vendor** need (or want) to know?

ALWAYS question whether the SOW....

- Allows vendors to provide the **best price**?
- Gives vendors **information to plan** their approach?
- Enables vendors to **minimize contingency**?
- Prevents vendors from **walking away**?

What does an Expert Vendor

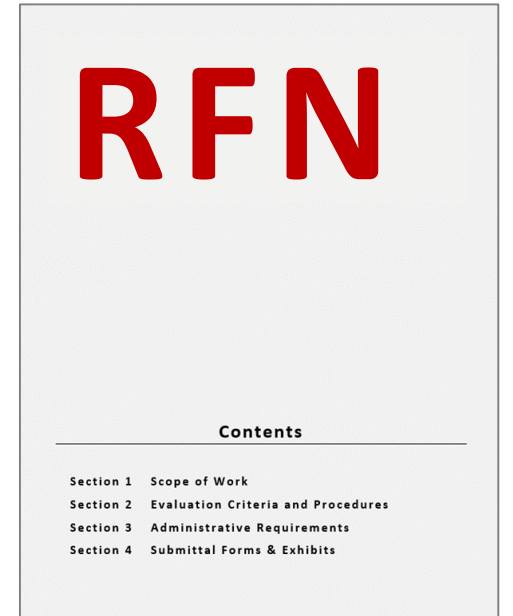
Need to Know

**to submit their best proposal
with minimal contingency?**

What is the RFN?

Request For Needs

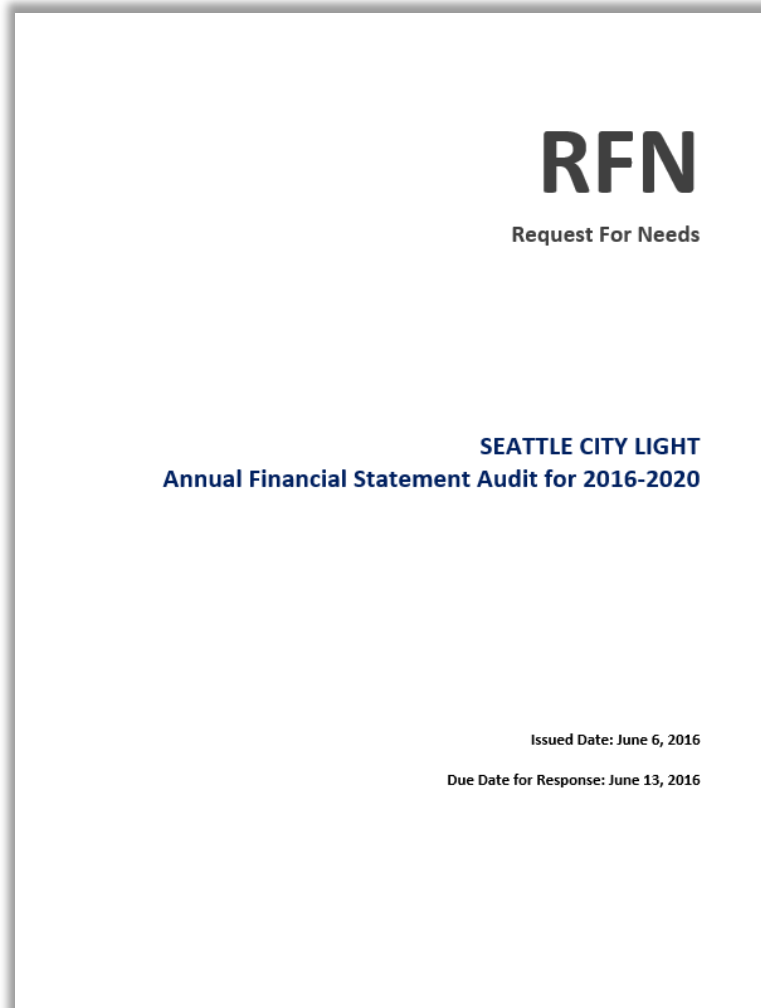
- **Informal Process**
- **Used to conduct market research**
- **Used as a preliminary fact-finding document**
- **Gather supplier feedback or advice**
- **Better define a problem, need, or solution**
- **Help define the next steps (with ITB, RFQ, or RFP)**





- Client creates & issues RFN document
- Suppliers prepare **written responses**
- Client SME's review
- **Client improves their SOW accordingly!**

Document Contents & Size



General Recommendations:

- **Current Conditions (1-2 pages)**
- **Goals, Outcomes, & Expectations (1-2 pages)**
- **RFN Response Forms (1-5 pages)**
(what you want vendors to answer)

An RFN improves the SOW...

... AND speeds up the project

Strengthen & Improve Your Solicitations by improving the SOW

***If You Are
Unsure About
the SOW***

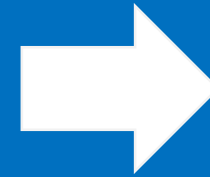
ITB

Solicitation



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- Section 2 Evaluation Criteria and Procedures
- Section 3 Administrative Requirements
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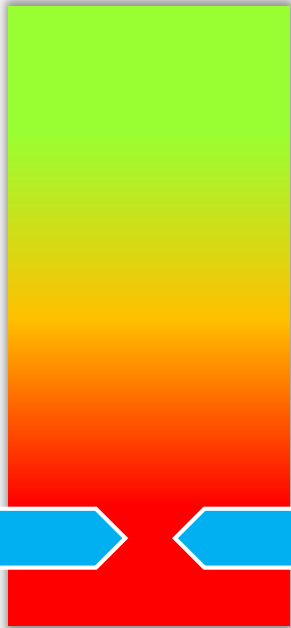


Contract



Confidence Level

High



Low

ITB

Solicitation



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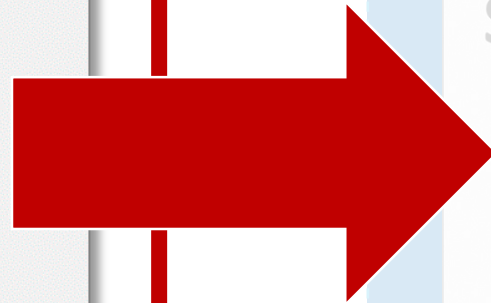
Contract



RFN

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ITB

Solicitation



Contents

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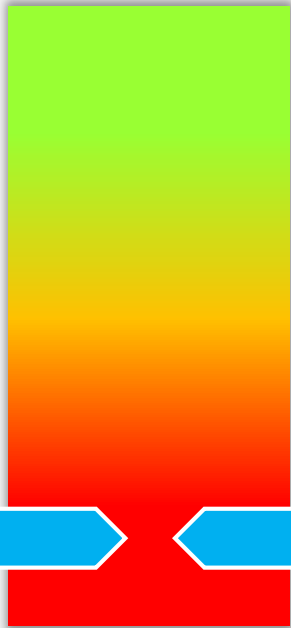


Contract



Confidence Level

High



Low

RFP

Solicitation



Contents

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- Section 4 Submittal Forms & Exhibits

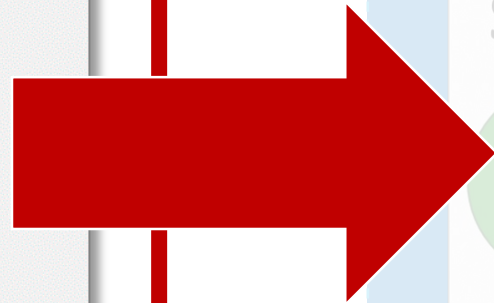
Contract



RFN

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- Section 4 Submittal Forms & Exhibits



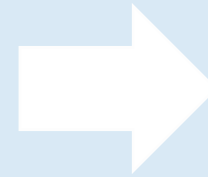
RFP

Solicitation



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Contract



Quick Review of Solicitations

ITB

Solicitation

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ITB

Solicitation



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ITB

Solicitation



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Contract Award



RFO

Solicitation

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RFO

Solicitation



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RFO

Solicitation



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Contract Award



RFP

Solicitation

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RFP

Solicitation



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RFP

Solicitation



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Contract Award



RFN

Targeted Market Research

Solicitation

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RFN

Targeted Market Research

Solicitation

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RFN

Targeted Market Research

Solicitation

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Contract



Developing the RFN

Successful RFN Format & Structure



Existing Conditions or Current Situation



Successful RFN Format & Structure



Existing Conditions or Current Situation



Desired Outcomes, Goals, Expectations

Successful RFN Format & Structure



Existing Conditions or Current Situation



Desired Outcomes, Goals, Expectations



Response Form



Document Size Matters!!!

If your RFN is over 10-pages...Vendors may be:

- Less likely to read**
- Less likely to provide a specific response & more likely to provide 'copy-and-paste' material**

Remember...Vendor is not getting paid for this!

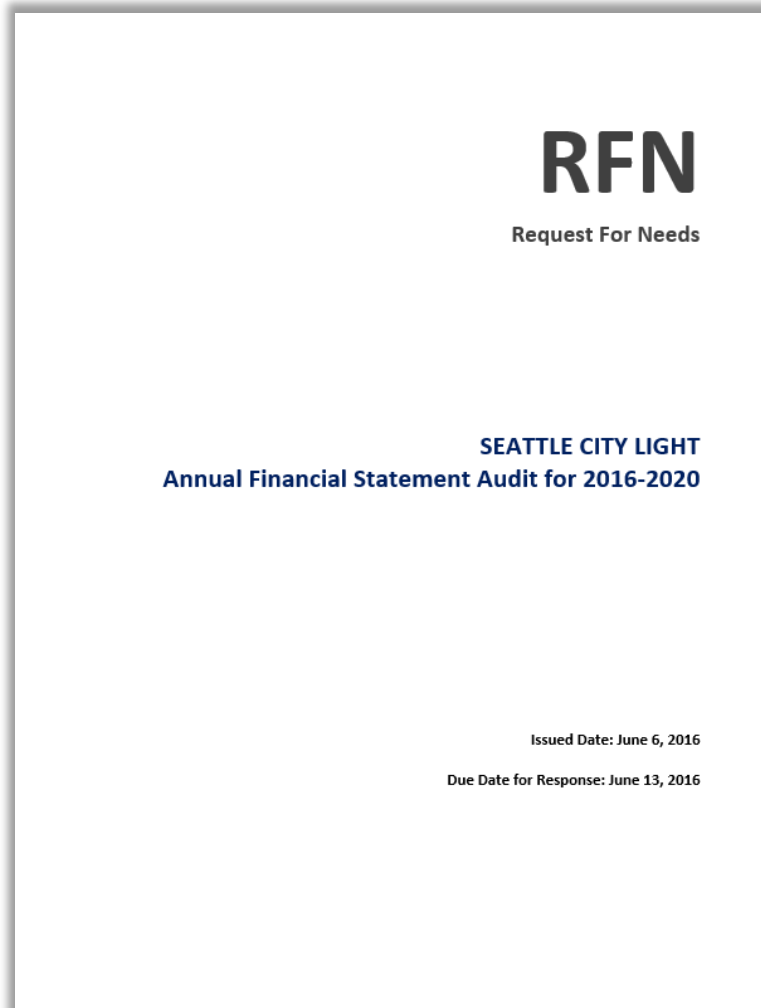


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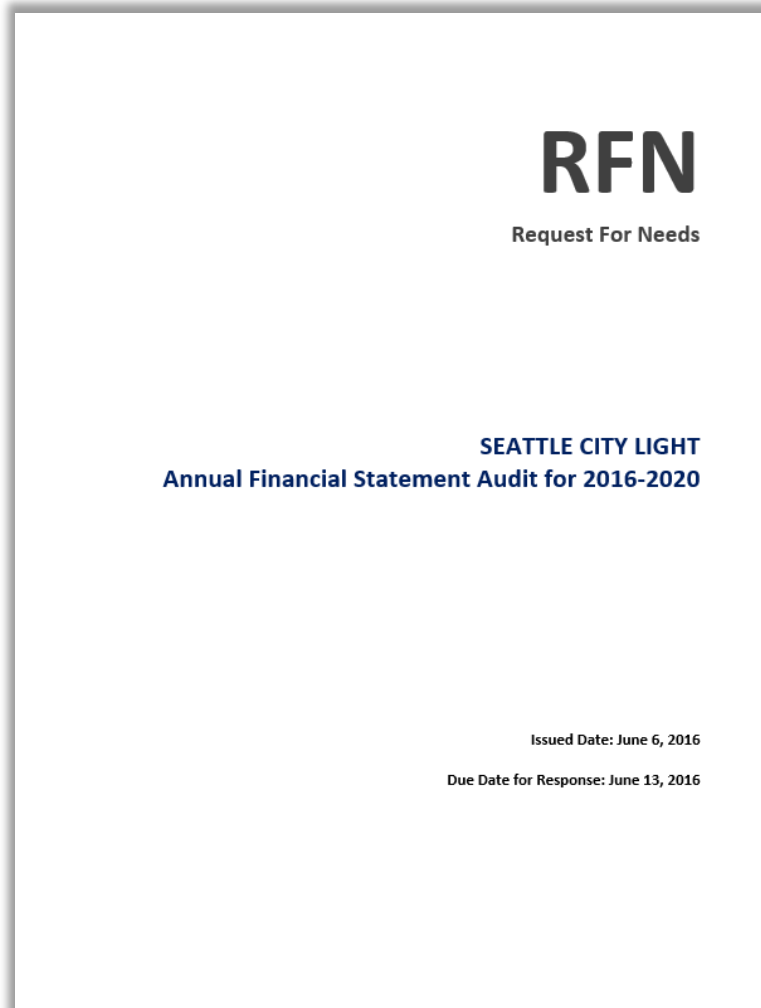
Document Contents & Size



General Recommendations:

- **Existing Conditions (1 page)**
- **Goals, Outcomes, & Expectations (1-2 pages)**

Document Contents & Size



General Recommendations:

- **Existing Conditions (1 page)**
- **Goals, Outcomes, & Expectations (1-2 pages)**
- **Response Forms (1-5 pages)**

RFN Response Form

- Avoid open ended responses
- Be specific/direct with information you are looking for:
 - Yes or No
 - True or False
 - 1-10 Scale

RFN RESPONSE FORM
Please respond to the questions below. Vendors are encouraged to be open and candid in their responses.

1. Are the expectations (as stated in Section 3) achievable? Please provide feedback if the expectations are realistic or not, or what changes you would recommend and why? **(2 Page Maximum)**

The major goal of the new program solution is that it will help the University decrease operational costs, reduce waste, and increase the user-to-device ratio.	Yes / No
The vendor can provide devices that print in Black and white/color printing, scanning, and copying as well as direct print/copy "off the glass", direct online print/copy, print from USB, collating, and stapling capabilities.	Yes / No
The vendor can centrally track toner levels and device errors, can proactively conduct toner replacement and device repairs without client initiation.	Yes / No
The devices must be able to work with both mac and windows.	Yes / No
The devices must be able to scan to fax, scan to email, scan to document storage, scan to Adobe PDF, scan to TIFF, and scan to USB functionality.	Yes / No
The devices must have scanning while printing capability, automatic document feeder with duplex functionality, bypass tray, support partially/fully recycled paper, and support locked print jobs.	Yes / No
The vendor can integrate all devices with the University's directory (both for user authentication to devices and for cost accounting reporting).	Yes / No
The vendor can provide services for their equipment (maintenance, toner, etc.).	Yes / No
The vendor can provide ongoing technical support for their equipment.	Yes / No
The vendor can provide a centralized print server that allows users to release print jobs anywhere on campus in addition to routing jobs to the central copy/print center on campus or the production print center off campus.	Yes / No
The vendor can provide a scalable solution, meaning that the equipment must be expandable/contractible if needs and demands change.	Yes / No
The vendor can collect measurements and metrics that will allow devices to be moved around campus and the type changed if the location or size is not appropriate on an annual basis to best meet these changes in usage patterns.	Yes / No
The vendor can provide a cost accounting solution interfacing directly with campus data systems to bill users/departments for their usage.	Yes / No
The vendor can provide usage reports grouped by building, device, and/or user/department as well as the ability to enforce quotas on users/departments.	Yes / No
The vendor can provide data on usage reports that can be tied into campus recharge/billing system (peoplesoft) for ease of department billing.	Yes / No
Vendor can provide single invoice to UCR for all document services on an ongoing basis.	Yes / No
The vendor can provide high-volume printing services.	Yes / No
The vendor can staff and manage a document print/services quick-copy retail center on central UCR campus.	Yes / No
The vendor can provide off-set and digital printing and reprographics services to produce high resolution materials such as brochures, marketing flyers, textbooks, and other publications.	Yes / No

6

RFN Response Form

- Avoid open ended responses
- Be specific/direct with information you are looking for:
 - Yes or No
 - True or False
 - 1-10 Scale
- Limit to 3-5 questions
- Responses should be limited to ½ page to 1 page max (per question)

RFN RESPONSE FORM

Please respond to the questions below. Vendors are encouraged to be open and candid in their responses.

1. Are the expectations (as stated in Section 3) achievable? Please provide feedback if the expectations are realistic or not, or what changes you would recommend and why? **(2 Page Maximum)**

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The vendor can centrally track toner levels and device errors, can proactively conduct toner replacement and device repairs without client initiation.	Yes / No
The devices must be able to work with both mac and windows.	Yes / No
The devices must be able to scan to fax, scan to email, scan to document storage, scan to Adobe PDF, scan to TIFF, and scan to USB functionality.	Yes / No
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The vendor can provide services for their equipment (maintenance, toner, etc.).	Yes / No
The vendor can provide ongoing technical support for their equipment.	Yes / No
The vendor can provide a centralized print server that allows users to release print jobs anywhere on campus in addition to routing jobs to the central copy/print center on campus or the production print center off campus.	Yes / No
The vendor can provide a scalable solution, meaning that the equipment must be expandable/contractible if needs and demands change.	Yes / No
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The vendor can provide a cost accounting solution interfacing directly with campus data systems to bill users/departments for their usage.	Yes / No
The vendor can provide usage reports grouped by building, device, and/or user/department as well as the ability to enforce quotas on users/departments.	Yes / No
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Vendor can provide single invoice to UCR for all document services on an ongoing basis.	Yes / No
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The vendor can staff and manage a document print/services quick-copy retail center on central UCR campus.	Yes / No
The vendor can provide off-set and digital printing and reprographics services to produce high resolution materials such as brochures, marketing flyers, textbooks, and other publications.	Yes / No

Keep it SIMPLE!!

Example: \$0.5B Service over 10 years

RFN included:

- **1pg of SOW overview**
- **½ pg RFN schedule (including info session)**
- **½ pg Instructions to Vendors**
- **1 pg of RFN Questions**

Keep it SIMPLE!!

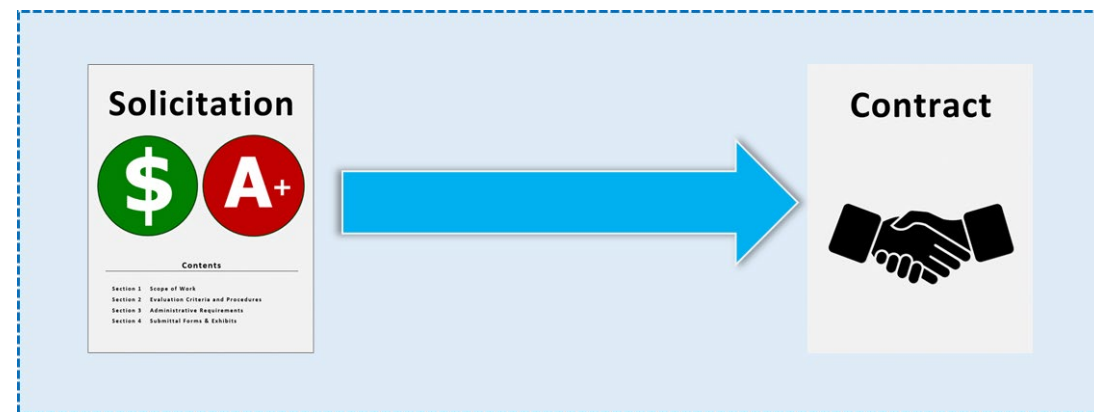
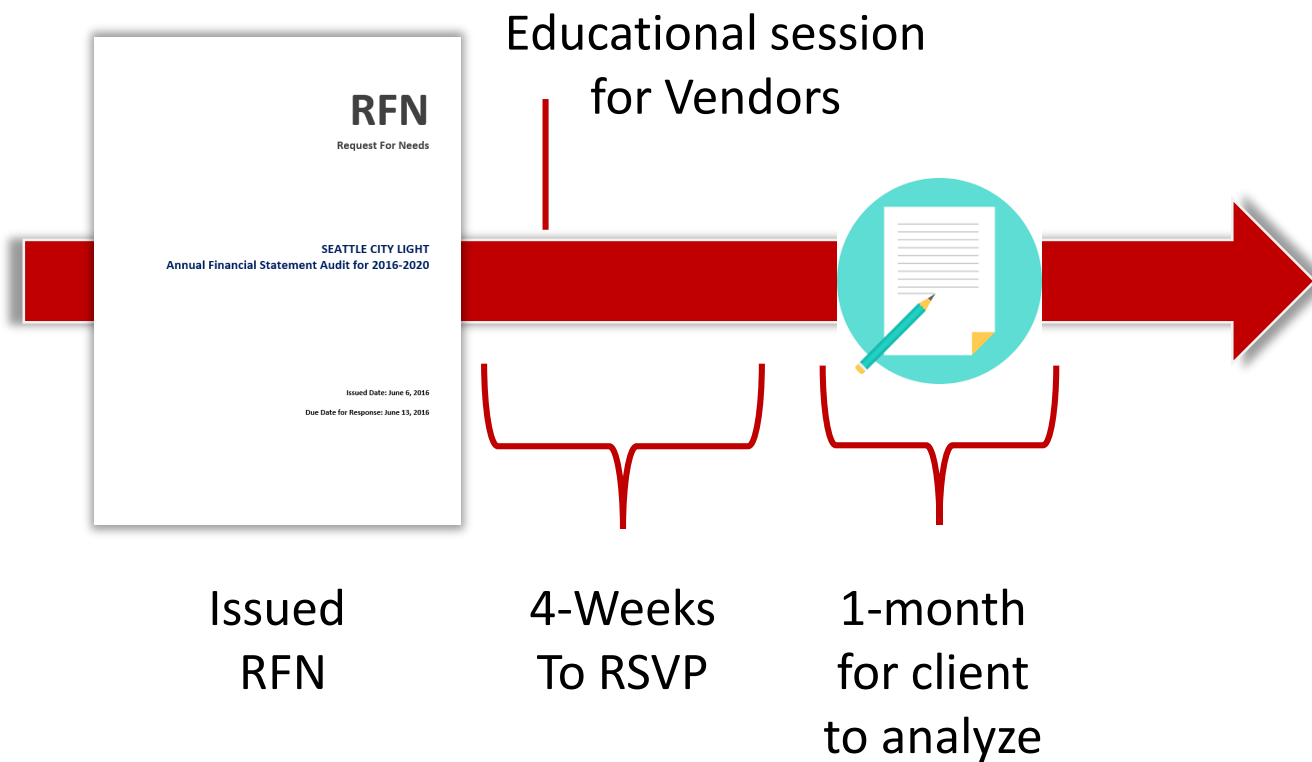
Example #1: \$0.5B Service over 10 years

RFN questions:

- 1. What information you will need in the RFP to prepare the best quality and accurate proposal, including an accurate and binding financial proposal?**
 - Please be as specific as possible so we can provide you with the appropriate information and data in the RFP.
- 2. Understanding that the financial proposal will be a critical aspect of the RFP evaluation proposal, what financial aspects should the University include in their evaluation that will most fairly represent the complete offerings of the proposers?**
 - What all should be considered, i.e. commission percentage, guaranteed payments, capital investment, new facilities, rebates, etc.?
- 3. What is your recommended length of contract and why?**
- 4. The University is planning on providing approximately six (6) weeks for proposals to be submitted, is this sufficient time? If not, please indicate how much time should be allotted and why.**
- 5. If there are specific items (internally) the University can begin working on now to facilitate a more efficient solution should a vendor be selected, please describe what those would be.**
- 6. Please provide any other comments or recommendations that could improve the probability of project success.**

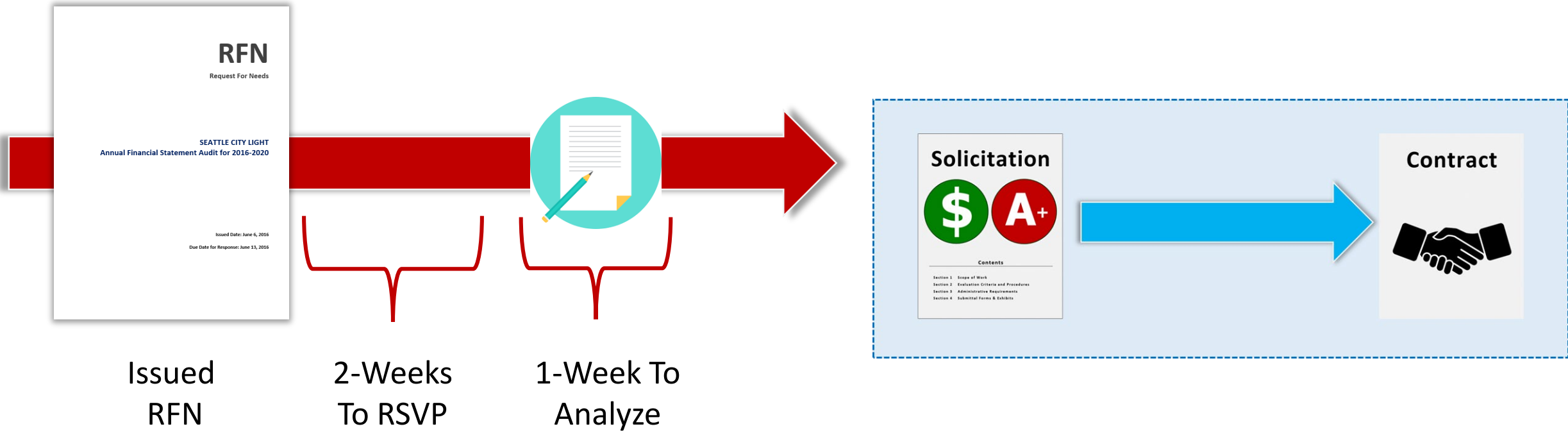
Keep it SIMPLE!!

Example #1: \$0.5B Service over 10 years



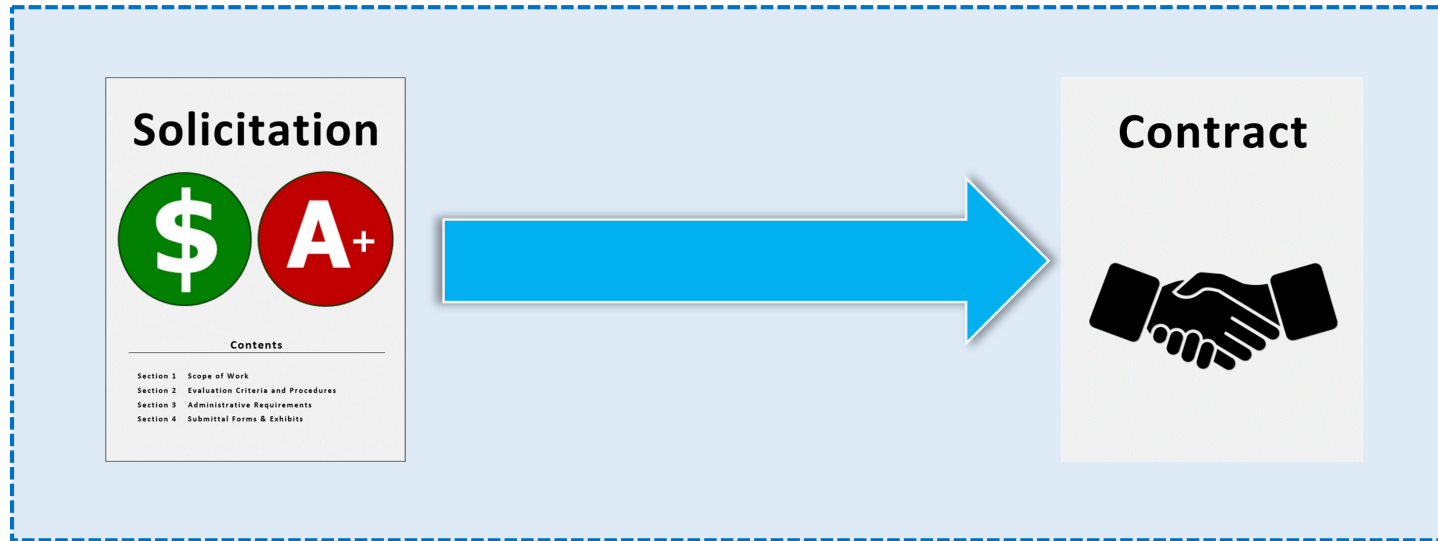
Timeline

Example #2: Professional Services



Timeline

Timeline



*Issue The
RFP*

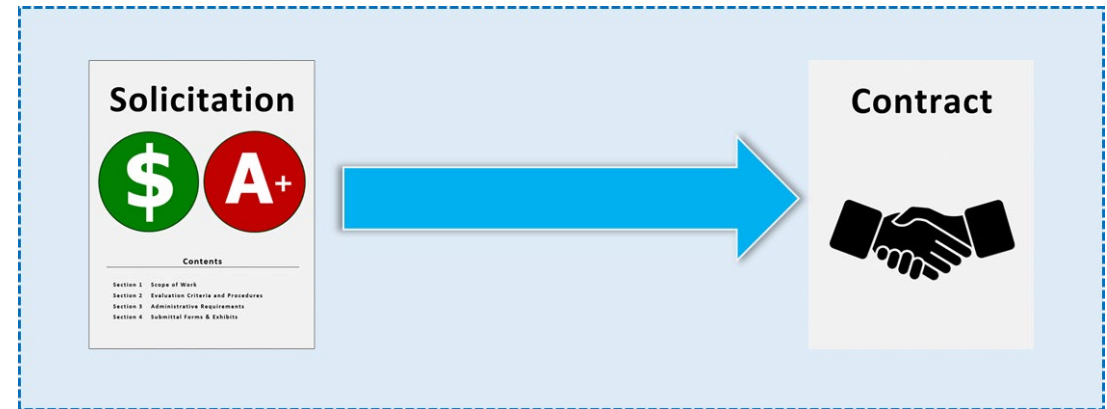
*Contract
Signed*

Timeline

Preparation Period

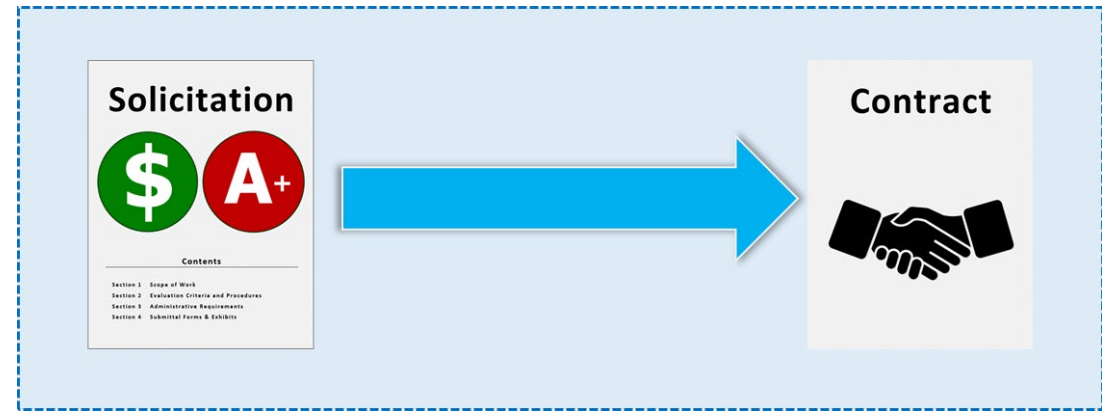
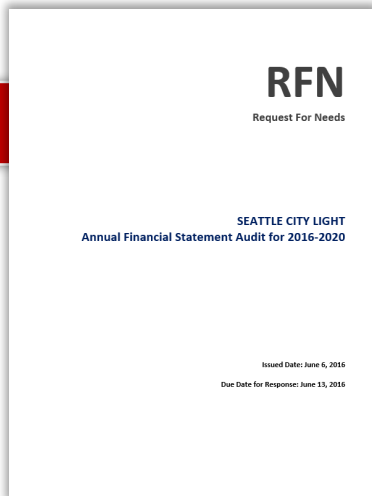


- Prepare the scope
- Obtain Approvals
- Finalize Schedule
- Coordinate with Evaluators
- Prepare Solicitation



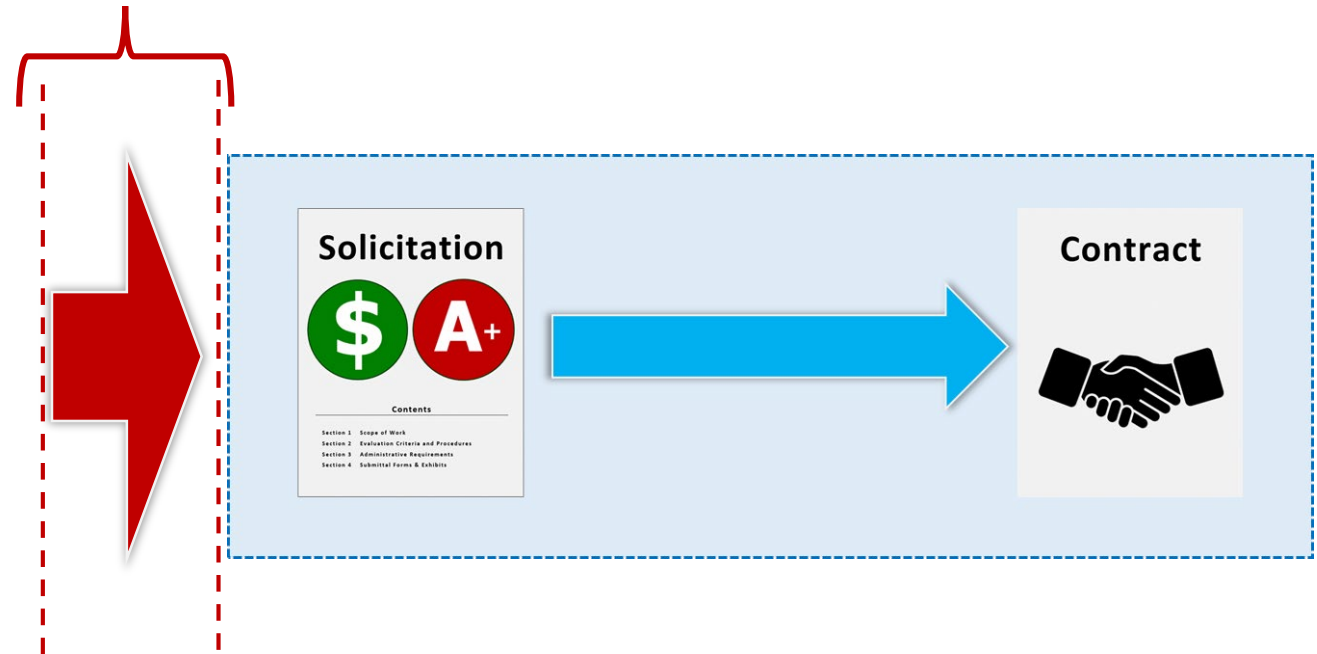
Timeline

- Prepare the scope
- Obtain Approvals
- Finalize Schedule
- Coordinate with Evaluators
- Prepare Solicitation



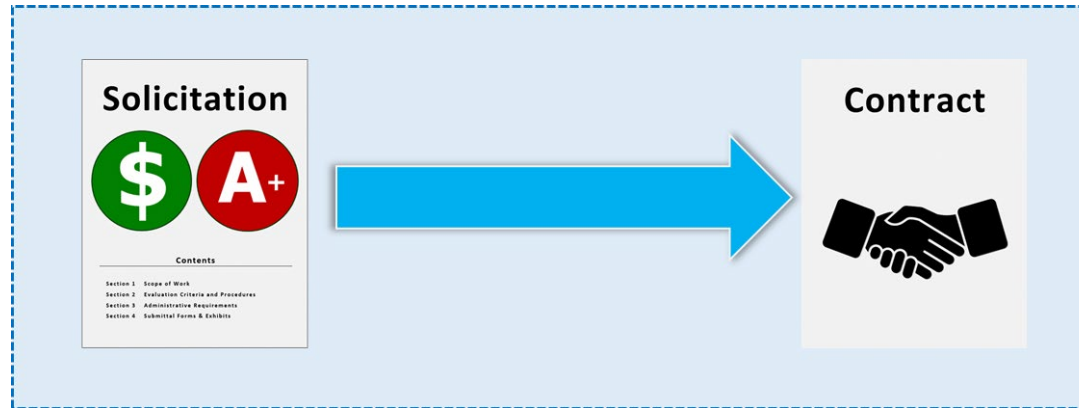
Timeline

*If Client Does
Not Prepare...*



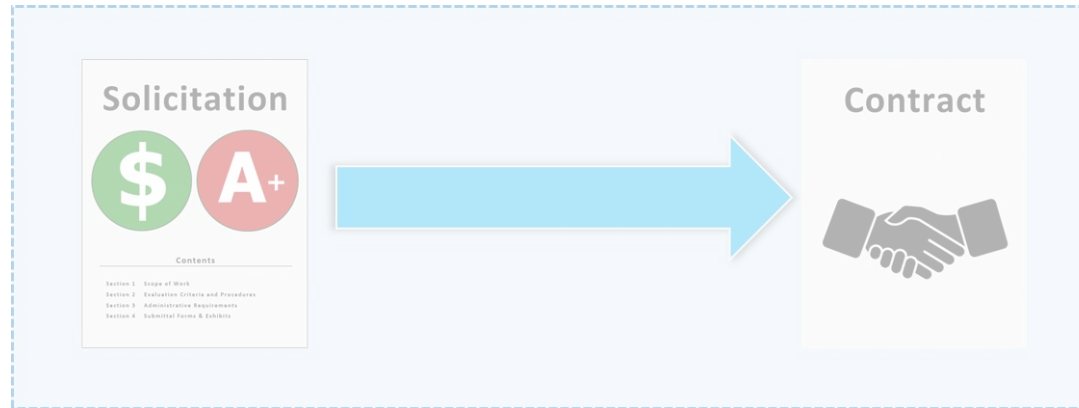
Quality of Scope

High Quality Scope
(Complete, Concise, & Accurate)

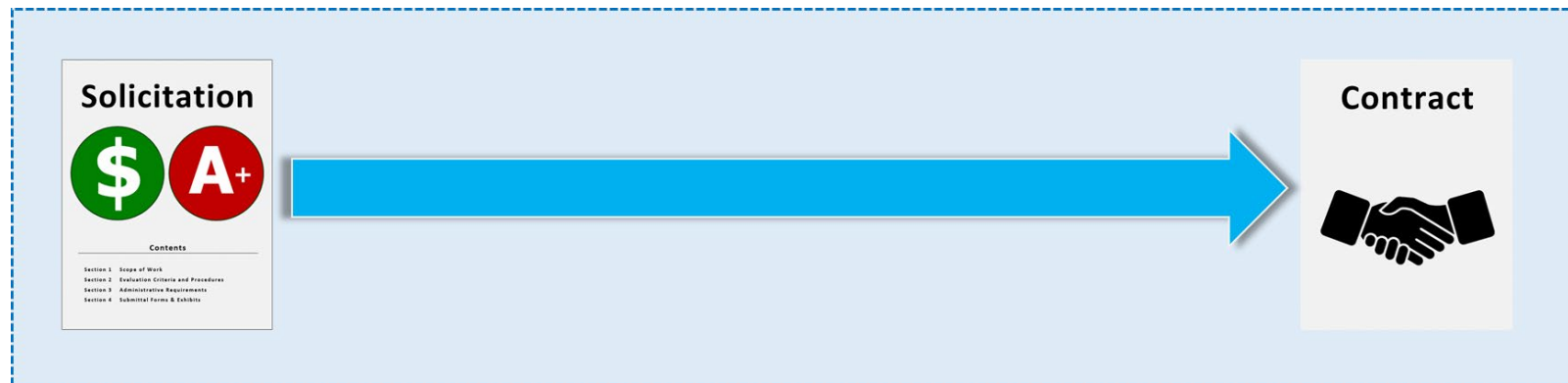


Quality of Scope

High Quality Scope
(Complete, Concise, & Accurate)



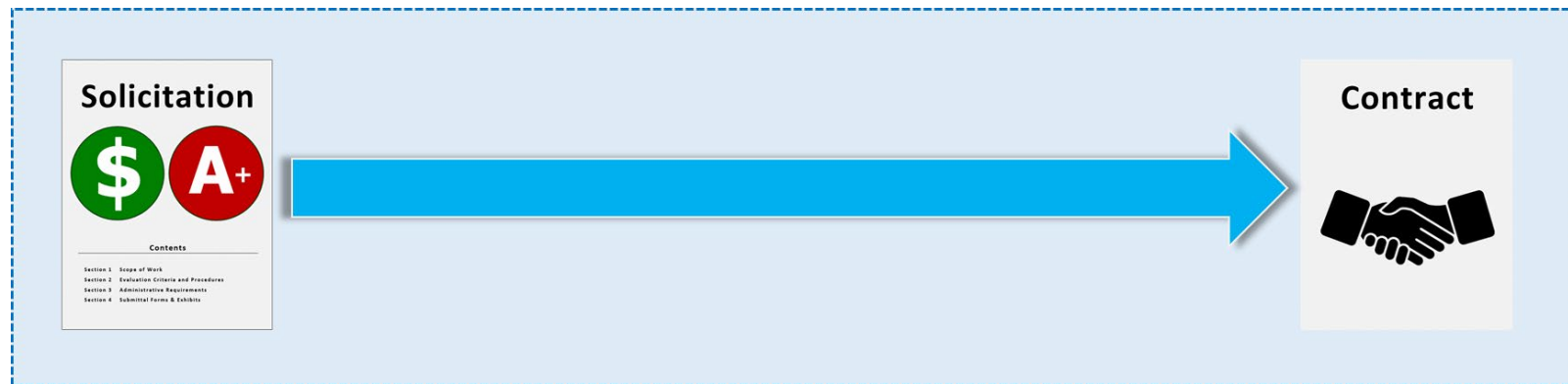
Low Quality Scope
(Complete, Concise, & Accurate)



Quality of Scope

- Significant Q&A
- Proposal Time Extension
- Evaluation Difficulty (Apples-to-Oranges)
- Contract Negotiation (Scope Adjustment)

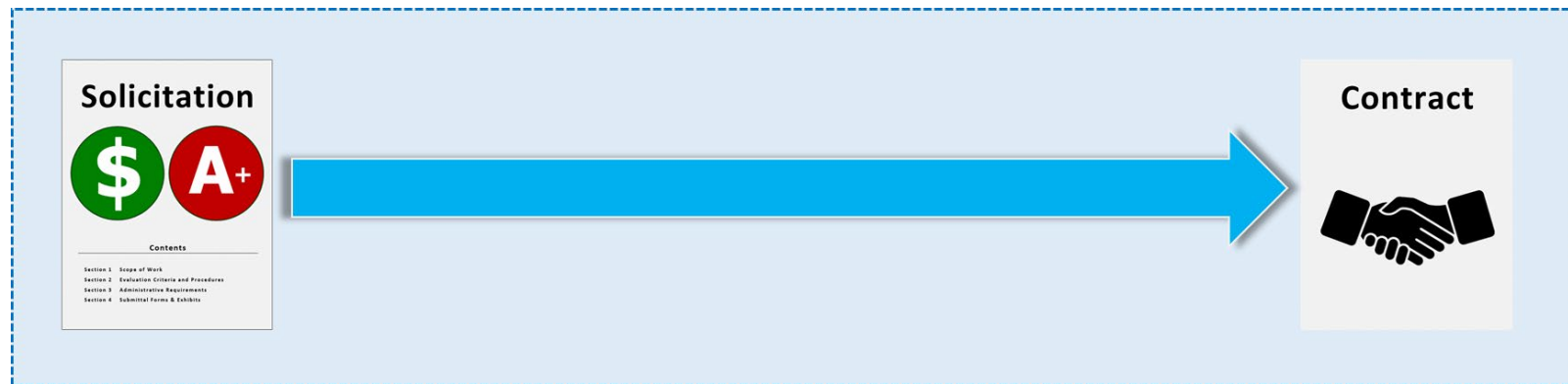
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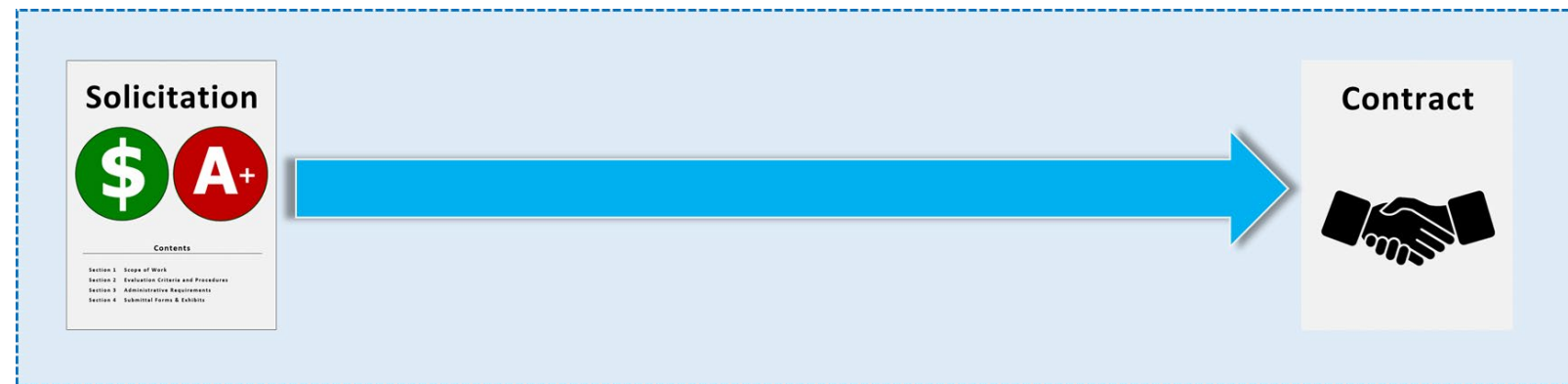
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(Complete, Concise, & Accurate)



Quality of Scope

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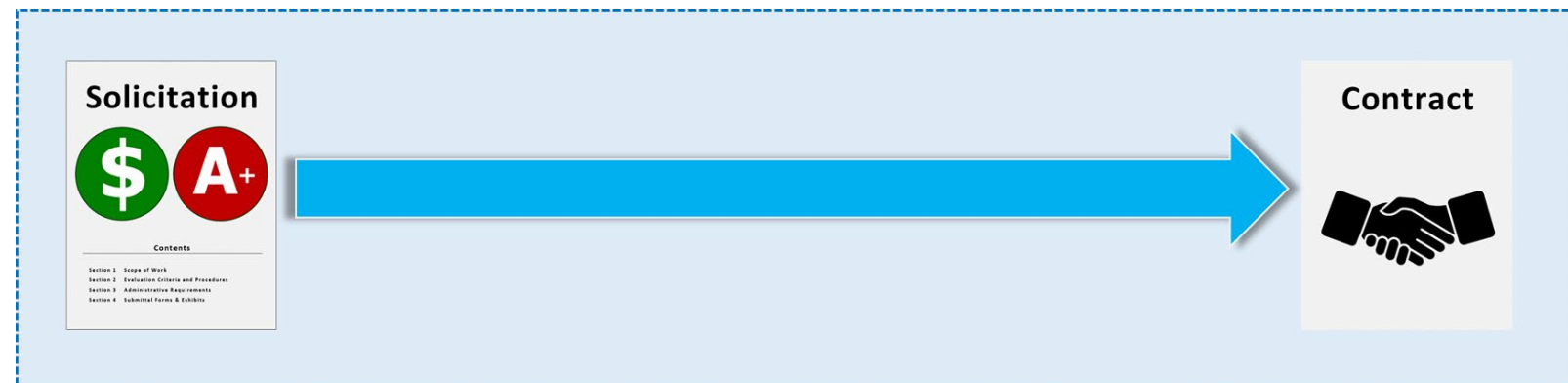
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Quality of Scope

- Significant Q&A
- Proposal Time Extension
- Evaluation Difficulty (Apples-to-Oranges)
- Contract Negotiation (Scope Adjustment)

Low Quality Scope
(Complete, Concise, & Accurate)



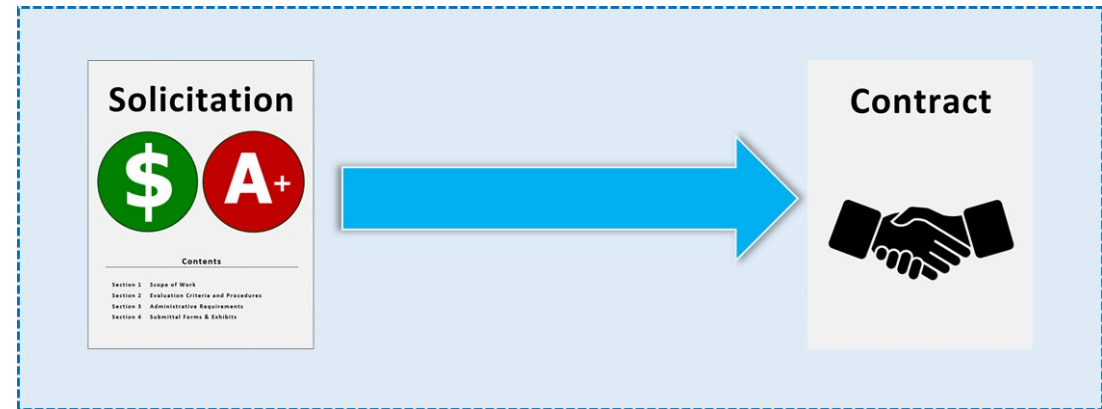
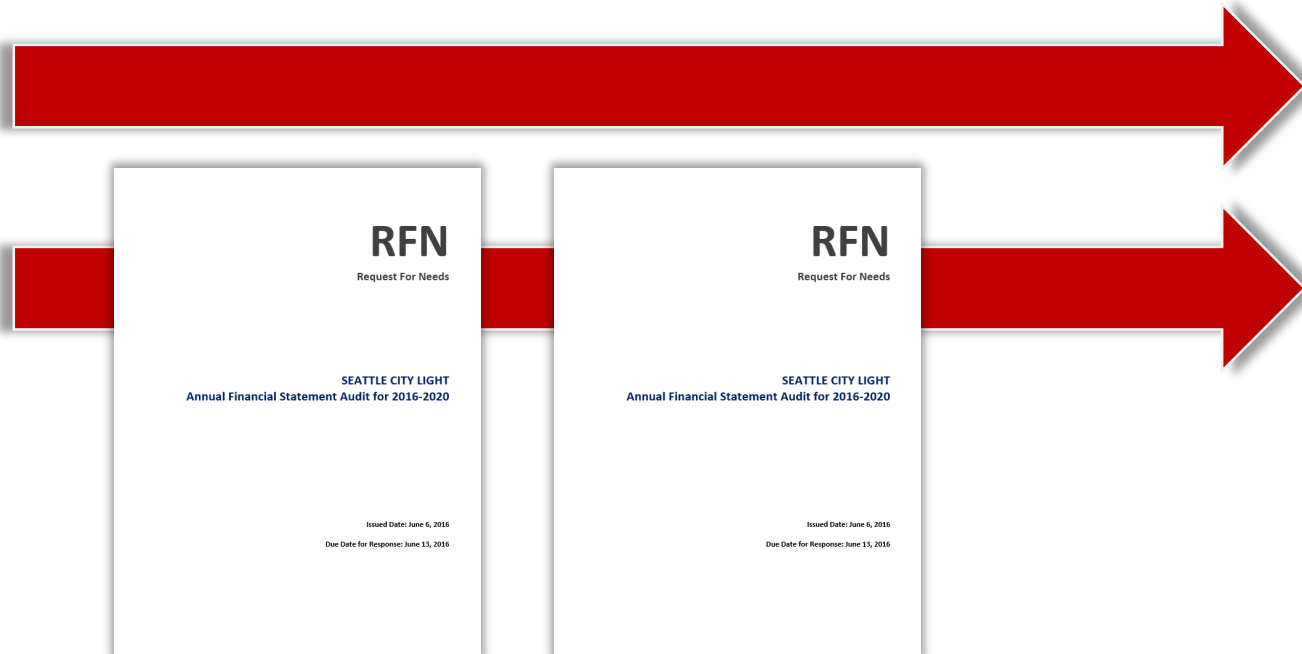
Timeline

- **RFN is completely informal (non-mandatory, non-binding)**
- **RFN can be performed at ANY time during the preparation phase**
- **RFN can be performed in 1-2 weeks!**
- **RFN can be skipped!**

What If New Questions Are
Discovered After Initial RFN
Responses Have Been Received?



Perform a Second RFN!

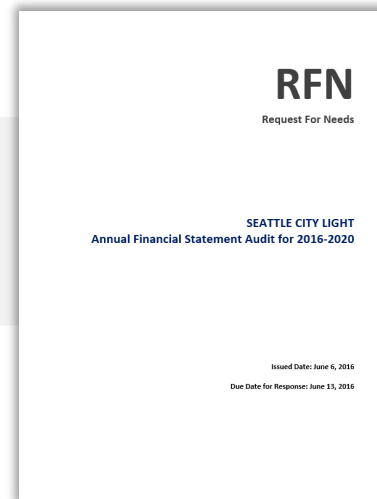


If Client Has Too Many Questions....

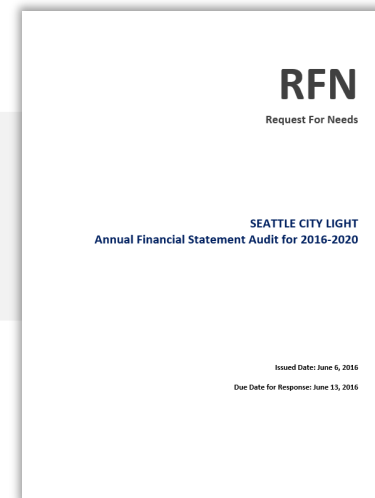
If Client Has Too Many Questions....

Prioritize!

#1



#2



For Large/Complex/Risky Projects...RFN is a Great Tool To Pre-Advertise



RFN vs RFI

What's The Difference?

Industry Perception on RFI's



RFI

Contents

Section 1 Scope of Work
Section 2 Evaluation Criteria and Procedures
Section 3 Administrative Requirements
Section 4 Submittal Forms & Exhibits

**Poor
Perception of
RFI's**

Common “Mistakes” in RFIs

Most Common “Mistakes”

X Request ‘trade secrets’



Most Common “Mistakes”

X Request ‘trade secrets’

X Request ‘costing’



Most Common “Mistakes”

- X Request ‘trade secrets’**
- X Request ‘costing’**
- X Request ‘wrong’ information**



Negative Impacts of Traditional RFI's

X Can increase the time to procure the project or service

Negative Impacts of Traditional RFI's

- X Can increase the time to procure the project or service**
- X Can increase the amount of effort and resources to solicit**

Negative Impacts of Traditional RFI's

- X Can increase the time to procure the project or service**
- X Can increase the amount of effort and resources to solicit**
- X Can increase the amount of resources required to review the responses**

Negative Impacts of Traditional RFI's

- ✗ Can increase the time to procure the project or service**
- ✗ Can increase the amount of effort and resources to solicit**
- ✗ Can increase the amount of resources required to review the responses**
- ✗ May not result in helpful or useful information**

**Traditional RFI's Are Often
Very Open-Ended**

Traditional RFI's Are Very Open-Ended

Describe your approach to....

Describe your methodology to...

2020 Global Human Capital Trends

The social enterprise at work: Paradox as a path forward

How can organizations remain distinctly human in a technology-driven world? This year's Global Human Capital Trends report calls upon...

[Read more >](#)



Ecosystems & Alliances relationships

we help business leaders design and implement solutions to improve operations and performance.

Core Business Operations Services

Bringing new efficiencies to the heart of your business.



Insights

2020 Global Blockchain Survey

From promise to reality

[Read more >](#)

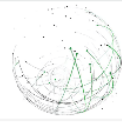


Perspectives

Modernized IT systems can help retail and consumer thrive post-COVID-19

Recovery and resilience for retailers and other businesses

[Read more >](#)



Perspectives

Technology Business Management

Solutions for aligning people, process, and technology

[Read more >](#)

[Digital Strategy Consulting](#)

[Public Sector Consulting](#)

[Retail, Wholesale & Distribution](#)

[Cyber Strategy](#)

Analysis

HX in times of uncertainty

How does the human experience (HX™) change in the face of widespread uncertainty?



Example

RFI #32110-SWC	
TECHNICAL INFORMATIONAL FORM	
Company Information	1. RESPONDENT LEGAL ENTITY NAME:
	2. RESPONDENT CONTACT PERSON: Name: Title: Address: Phone Number: Email:
	3. Provide a description of your company (number of employees, annual revenues, locations, years in existence, etc.). a. Specify how many employees you have for administrative staff, scanning services, etc. b. How many trucks do you own or lease that would be used in performance of the scope of services?
	4. How many physical locations does your company have throughout the State of Tennessee? Other states? Please provide address for each location, how many employees are at each location, and a detailed explanation of the type of facility at this location; i.e. warehouse with inventory personnel, office building with administrative employees, storage facility, etc.
	5. Describe your company's insurance capabilities. a. What are the minimum levels for each the State should require from companies for these services? b. If the State considered requiring Professional Liability Insurance and an intellectual property, cyber-risk/network security/privacy Insurance, what impact would that have for companies who provide this service?
	6. Does your company perform background checks on employees? a. If so, detail the process and list the organization or governmental entity used to check or verify backgrounds. b. How frequently is a background check performed for each employee? c. What level of background checks have customers requested in the past?
	7. Have you ever been asked to use a customer's training materials regarding confidentiality of their documents? For instance, employees would sign a training log, watch a video, and sign an acknowledgement agreement annually. If not, what considerations would a company require to accommodate this request? Would this require an additional cost?
	8. Describe your company's experience with IRS documents, PII (Personally identifiable information), HIPPA and a detailed explanation of the process used to ensure the security and confidentiality of highly sensitive documents. Please include any specific federal or state policies that you may follow or have used to implement your process. Also, describe how your company would modify its processes if federal or state policies

Example

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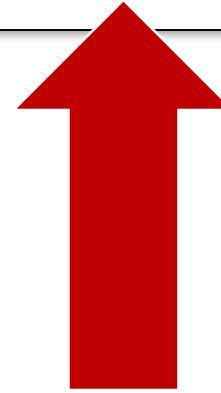
- RFI asked 82 questions
- Did not provide a simple format/structure for response
- Asked for general information, or 'proposal-type' information

What Will You Do With This Information?

3. Provide a description of your company (number of employees, annual revenues, locations, years in existence, etc.).
 - a. Specify how many employees you have for administrative staff, scanning services, etc.
 - b. How many trucks do you own or lease that would be used in performance of the scope of services?

What Will You Do With This Information?

3. Provide a description of your company (number of employees, annual revenues, locations, years in existence, etc.).
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 - b. How many trucks do you own or lease that would be used in performance of the scope of services?



FIRM A

58 employees
7 owned trucks

FIRM B

79 employees
3 leased trucks

What Will You Do With This Information?

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 - a. Specify how many employees you have for administrative staff, scanning services, etc.
 - b. How many trucks do you own or lease that would be used in performance of the scope of services?

FIRM A

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7 owned trucks



FIRM B

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3 leased trucks

What are we gaining....How does this help us refine scope?

What Will You Do With This Information?

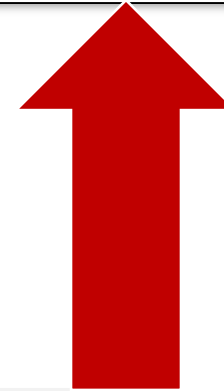
4. How many physical locations does your company have throughout the State of Tennessee? Other states?

Please provide address for each location, how many employees are at each location, and a detailed explanation of the type of facility at this location; i.e. warehouse with inventory personnel, office building with administrative employees, storage facility, etc.

What Will You Do With This Information?

4. How many physical locations does your company have throughout the State of Tennessee? Other states?

Please provide address for each location, how many employees are at each location, and a detailed explanation of the type of facility at this location; i.e. warehouse with inventory personnel, office building with administrative employees, storage facility, etc.



FIRM A

17 locations

Warehouse (7)

Office building (2)

Storage (17)

FIRM B

8 locations

Warehouse (8)

Office building (8)

Storage (8)

What Will You Do With This Information?

4. How many physical locations does your company have throughout the State of Tennessee? Other states?

Please provide address for each location, how many employees are at each location, and a detailed explanation of the type of facility at this location; i.e. warehouse with inventory personnel, office building with administrative employees, storage facility, etc.

FIRM A

17 locations
Warehouse (7)
Office building (2)
Storage (17)

FIRM B

8 locations
Warehouse (8)
Office building (8)
Storage (8)

Results

RFI #32110-SWC TECHNICAL INFORMATIONAL FORM	
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- Client spends **2-months**
- **42 page** response (average)
- 99% of responses were marketing / **cut & paste**
- Client does **not know how** to utilize this information in the RFP Scope

Properly Structured RFN's

- ✓ **Can be extremely quickly** (with no impact to procurement timeline)
- ✓ **Can minimize the amount of effort and resources to solicit and review responses**
- ✓ **Can provide very valuable and useful information**

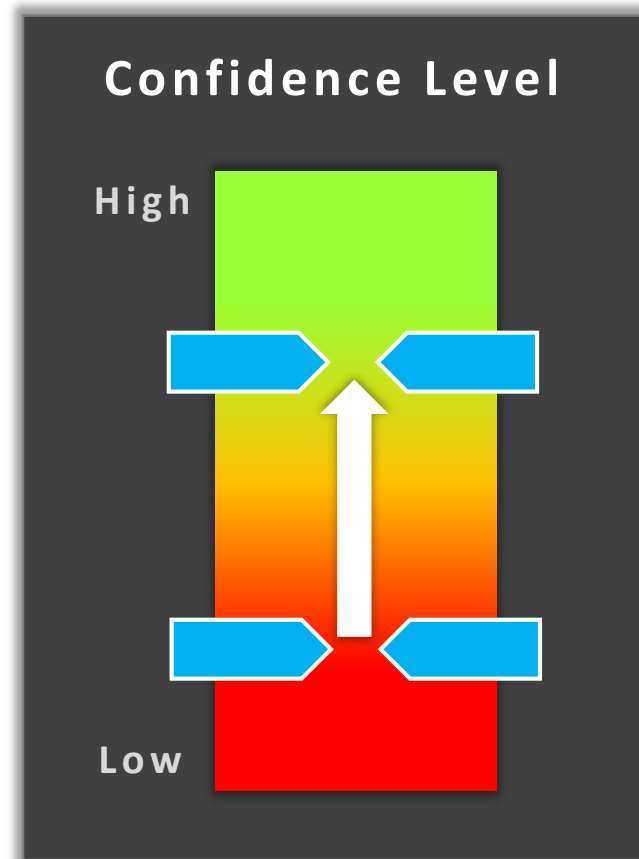
Why Use the RFN Tool?

Fair | Open | Transparent | Value | Integrity

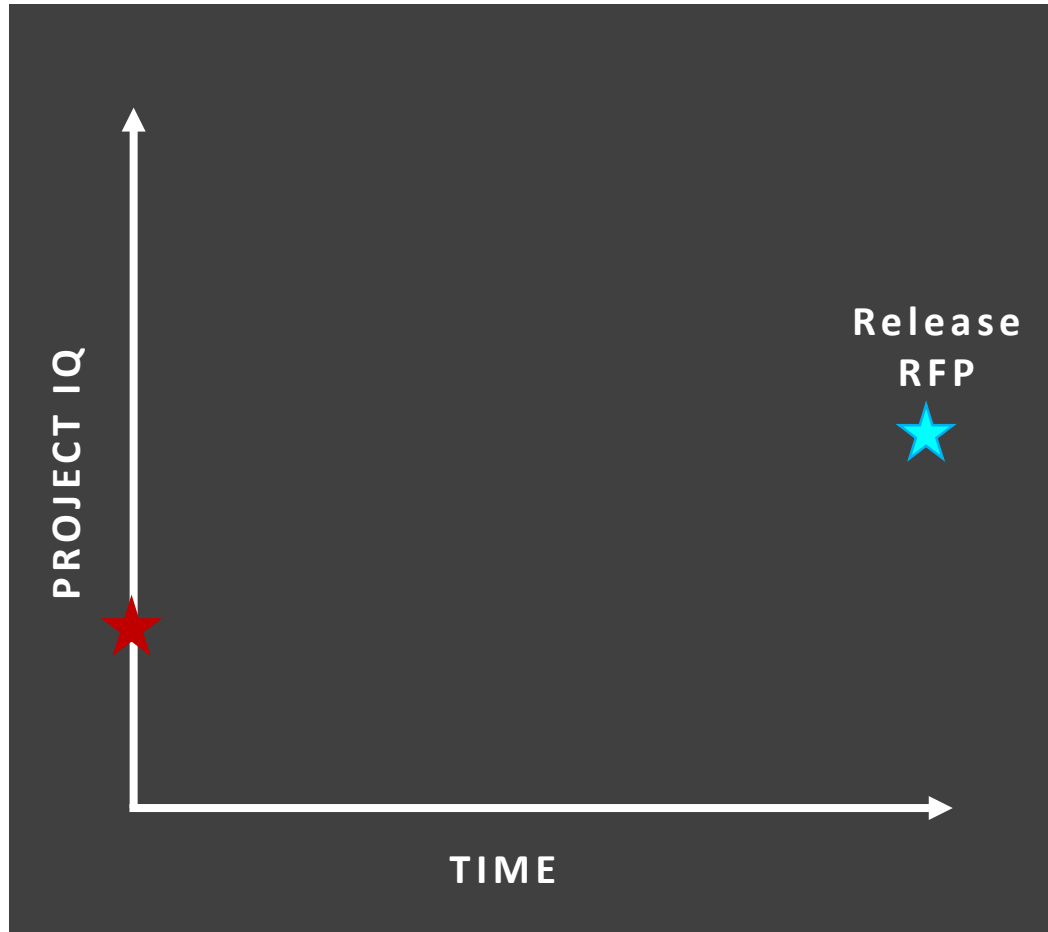
**CPE Best Practices:
Critical to become a
Client of Choice!**

When to Use the RFN?

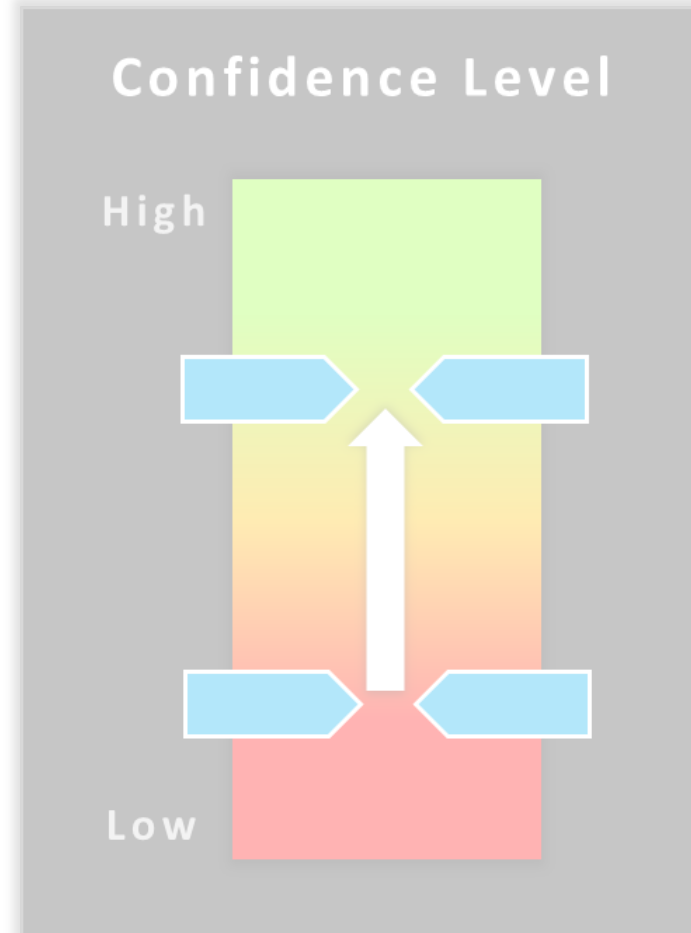
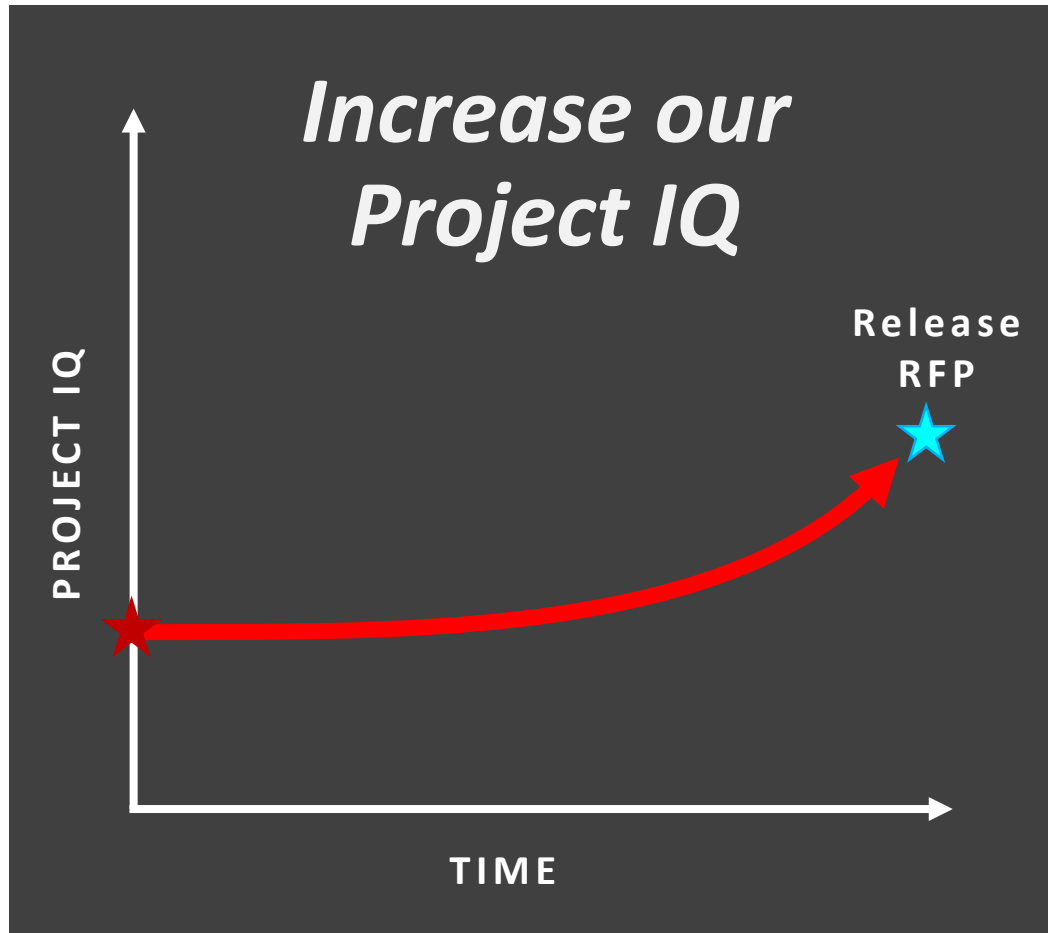
Goal of RFN?



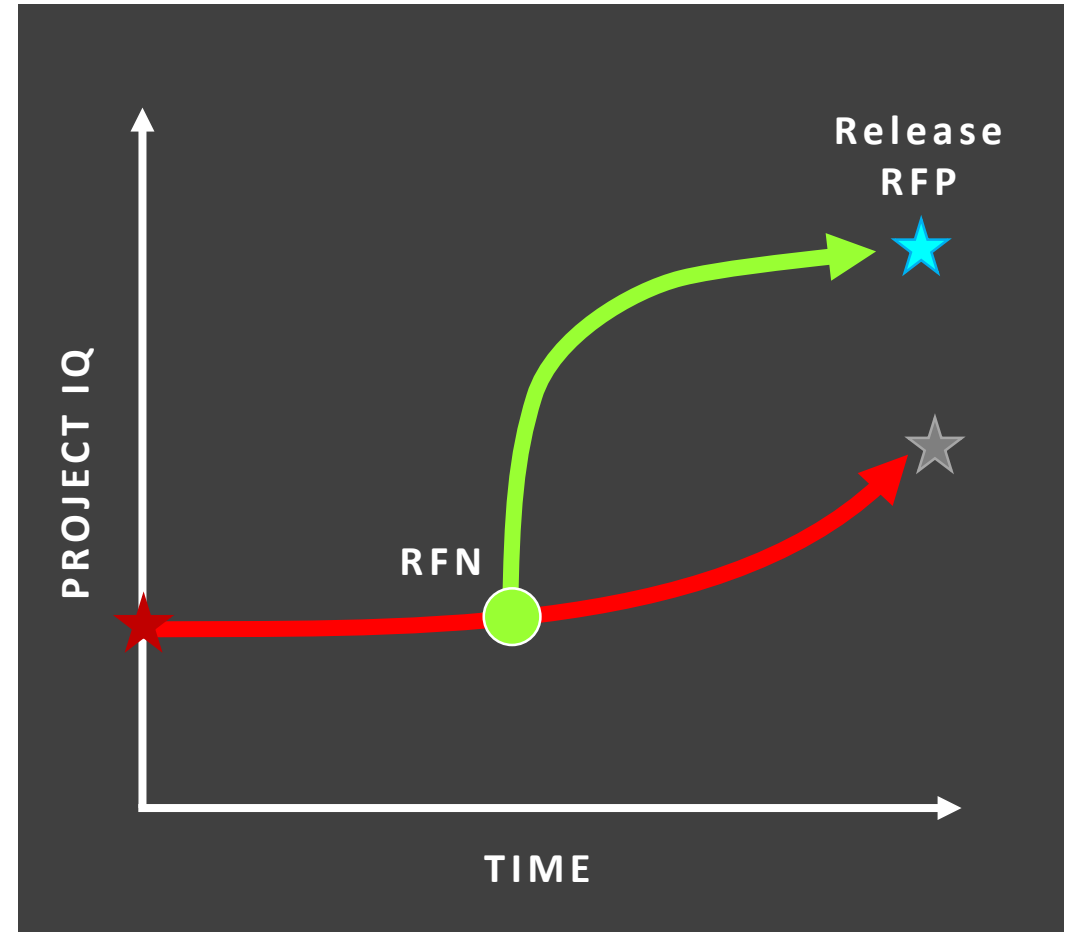
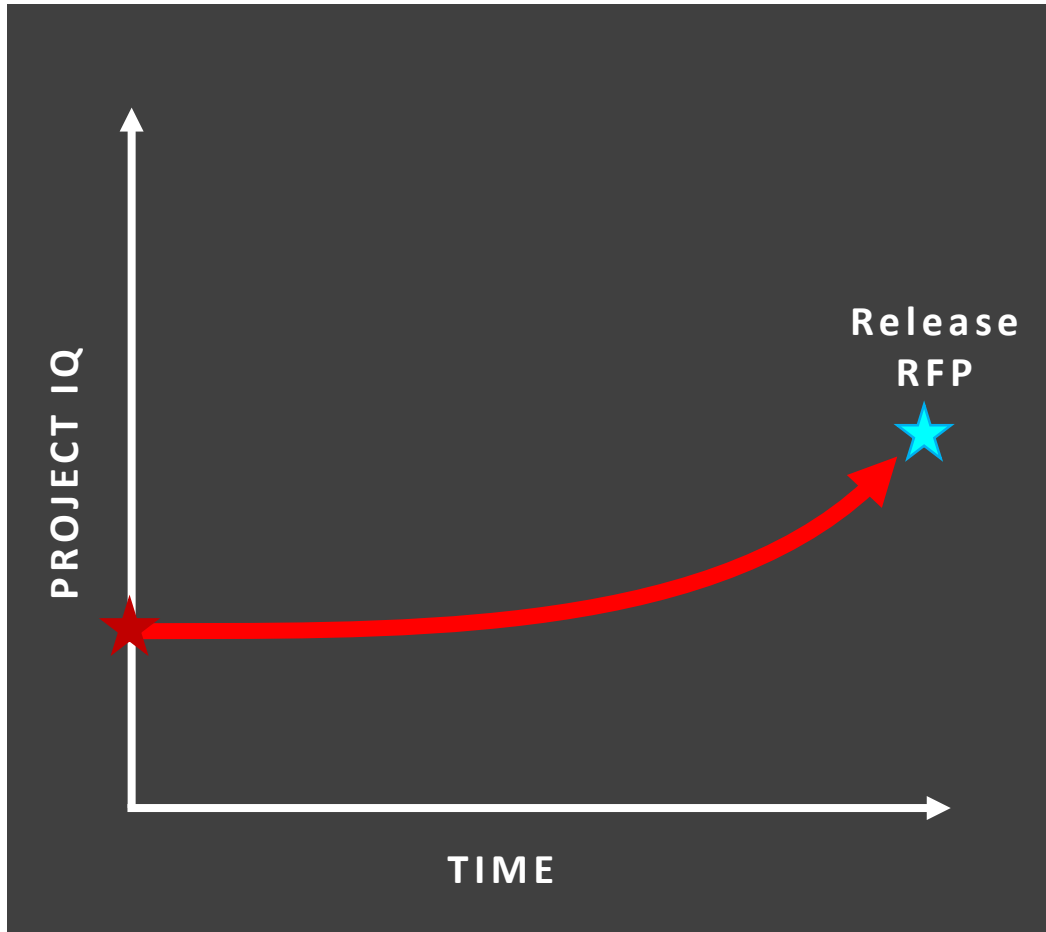
What Is Our Goal?



What Is Our Goal?

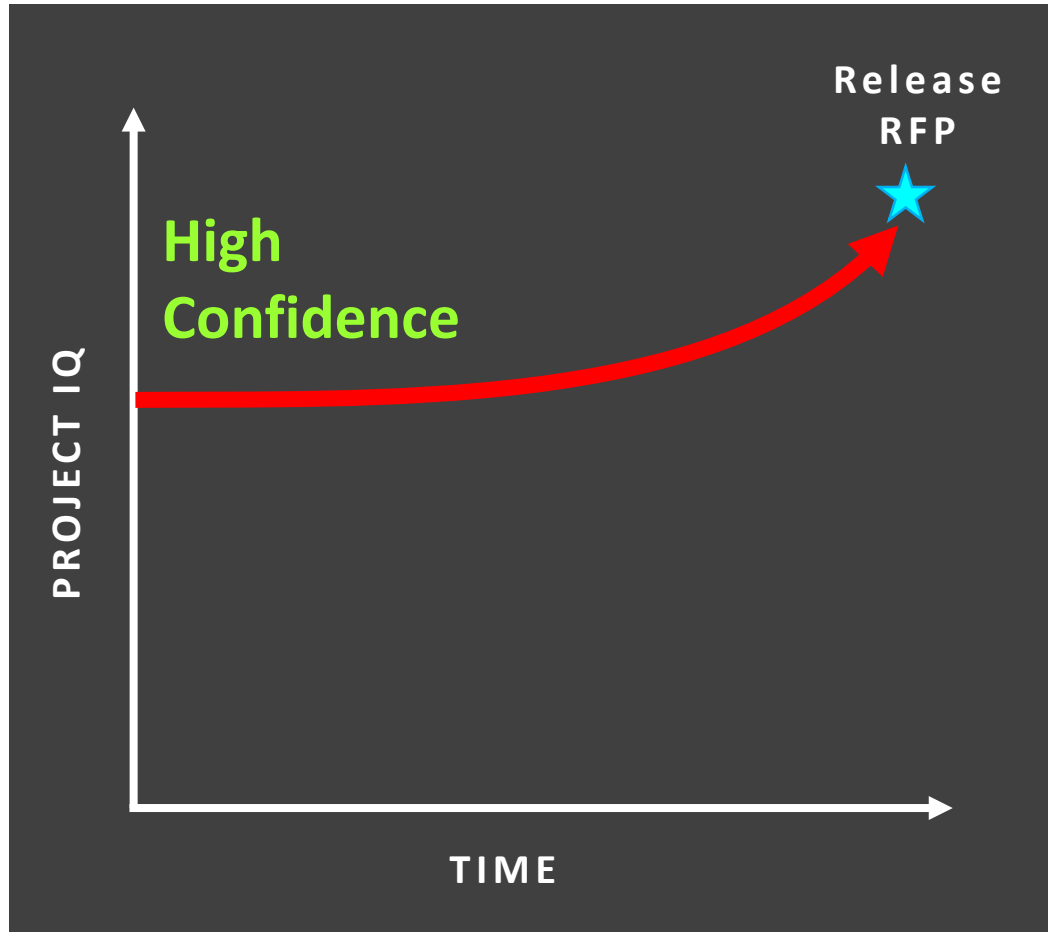


What Is Our Goal?

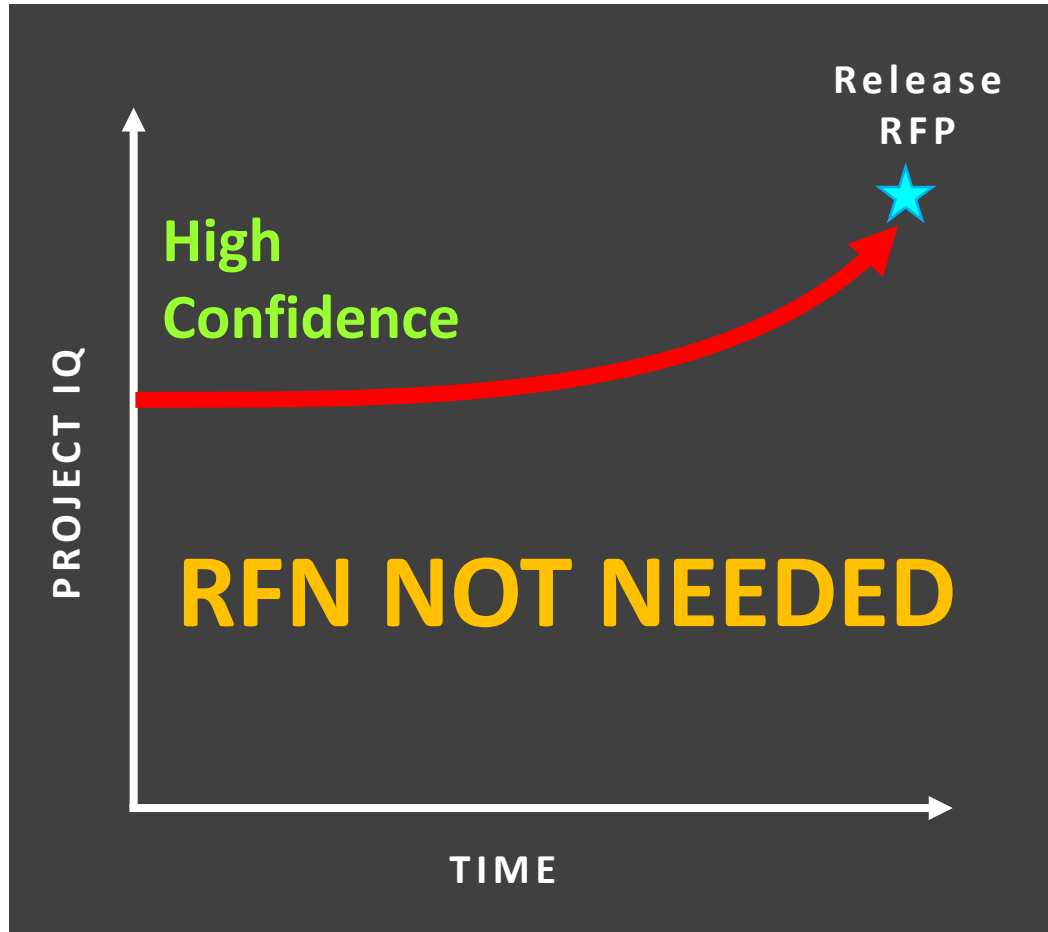


Does Your Project Need An RFN?

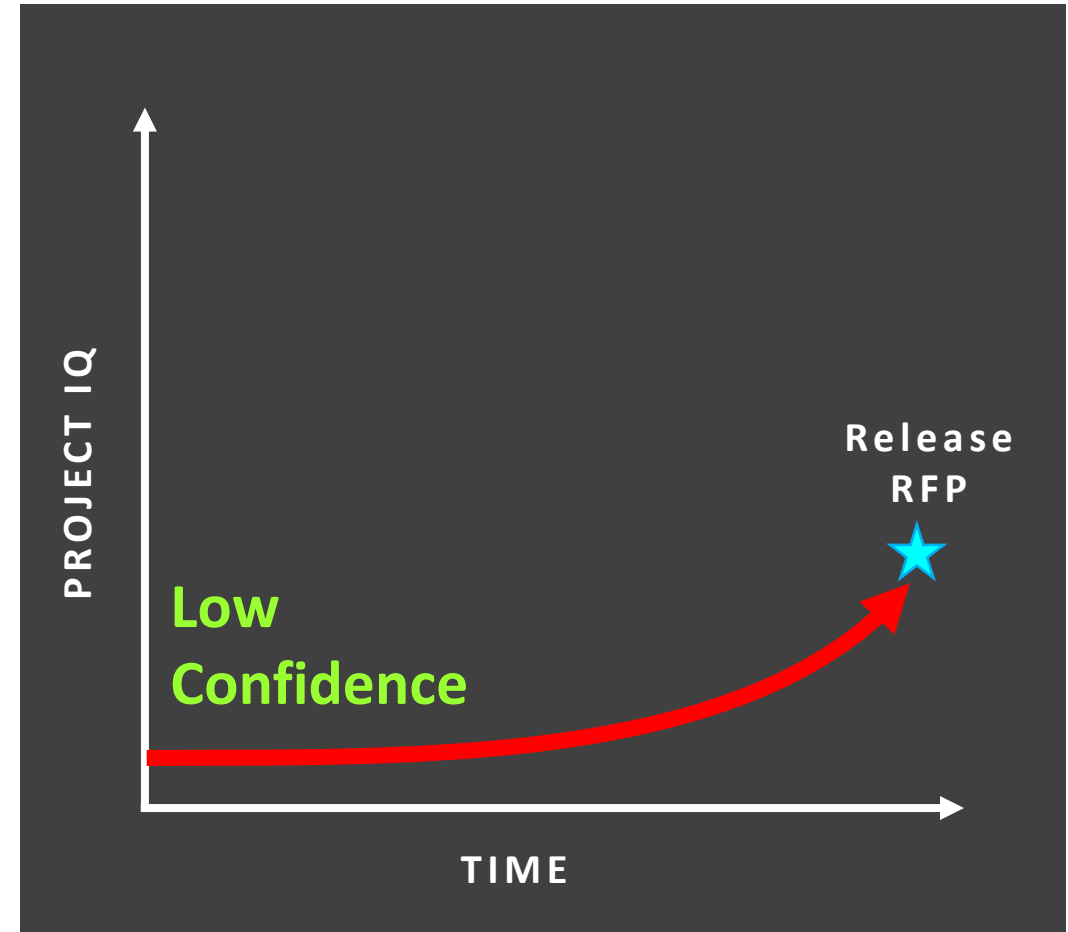
Does Your Project Need An RFN?



Does Your Project Need An RFN?



Does Your Project Need An RFN?



Project IQ - What Projects Are Best Suited?

What Projects Are Best Suited?

- **Projects that organization does not have a lot of experience with (first time procuring or first time in 5-10 years)**
- **Projects that have failed in past or have high failure rate**
- **Projects where Client has a lot of uncertainties about scope**
- **Immature industries**

Examples

(Assume The Owner Is A University)

Scope: Client is seeking to renovate an existing office space in a building.

Examples

(Assume The Owner Is A University)

Scope: Client is seeking to renovate an existing office space in a building.

- 1. Client Experience: High** (has performed 13 similar renovations this year)

Examples

(Assume The Owner Is A University)

Scope: Client is seeking to renovate an existing office space in a building.

- 1. Client Experience: High** (has performed 13 similar renovations this year)
- 2. Previous Success Rate: High** (no significant performance issues)

Examples

(Assume The Owner Is A University)

Scope: Client is seeking to renovate an existing office space in a building.

- 1. Client Experience: High** (has performed 13 similar renovations this year)
- 2. Previous Success Rate: High** (no significant performance issues)
- 3. Clarity of scope: High** (no concerns with the scope)

Examples

(Assume The Owner Is A University)

Scope: Client is seeking to renovate an existing office space in a building.

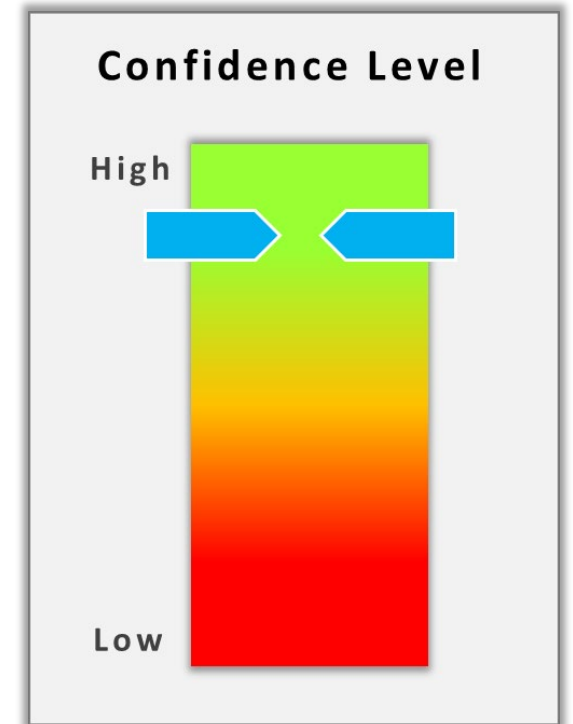
- 1. Client Experience: High** (has performed 13 similar renovations this year)
- 2. Previous Success Rate: High** (no significant performance issues)
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- 4. Industry Maturity: High**

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***RFN
Unlikely***

Examples

(Assume The Owner Is A University)

Scope: Client is seeking to renovate electrical/lighting in a dormitory.

Examples

(Assume The Owner Is A University)

Scope: Client is seeking to renovate electrical/lighting in a dormitory.

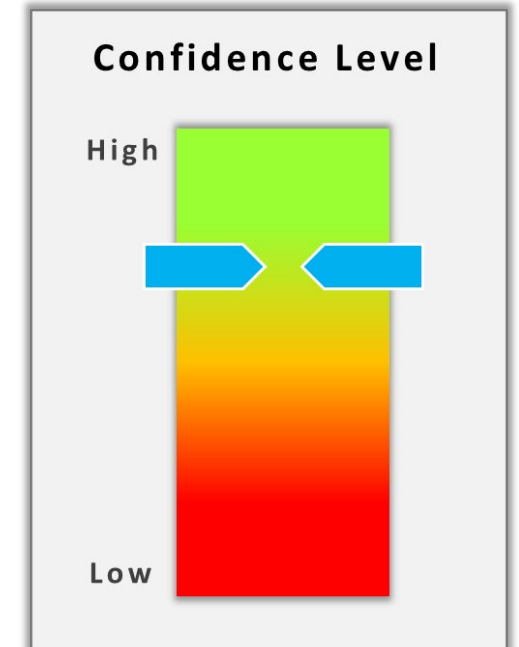
1. **Client Experience: High** (has performed 5 similar renovations this year)
2. **Previous Success Rate: Moderate** (challenges, but no significant issues)
3. **Clarity of scope: Moderate** (some unknowns, but not concerned)
4. **Industry Maturity: High**

Examples

(Assume The Owner Is A University)

Scope: Client is seeking to renovate electrical/lighting in a dormitory.

1. **Client Experience:** **High** (has performed 5 similar renovations this year)
2. **Previous Success Rate:** **Moderate** (challenges, but no significant issues)
3. **Clarity of scope:** **Moderate** (some unknowns, but not concerned)
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Examples

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3. **Clarity of scope: Moderate** (some unknowns, but not concerned)
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***RFN
Unlikely***

Examples

(Assume The Owner Is A University)

Scope: Client needs to re-procure janitorial contract that will be expiring this year. Current contract has been in place for 5-years.

- 1. Client Experience: Low** (has performed 2 in last 10 years)
- 2. Previous Success Rate: High** (challenges, but no significant issues)
- 3. Clarity of scope: High** (very complete scope)
- 4. Industry Maturity: High**

Examples

(Assume The Owner Is A University)

Scope: Client needs to re-procure janitorial contract that will be expiring this year. Current contract has been in place for 5-years.

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***RFN
Unlikely***

Examples

(Assume The Owner Is A University)

Scope: Client needs to procure a new food-service contract. This is currently being done in-house and will be the first time outsourcing this service.

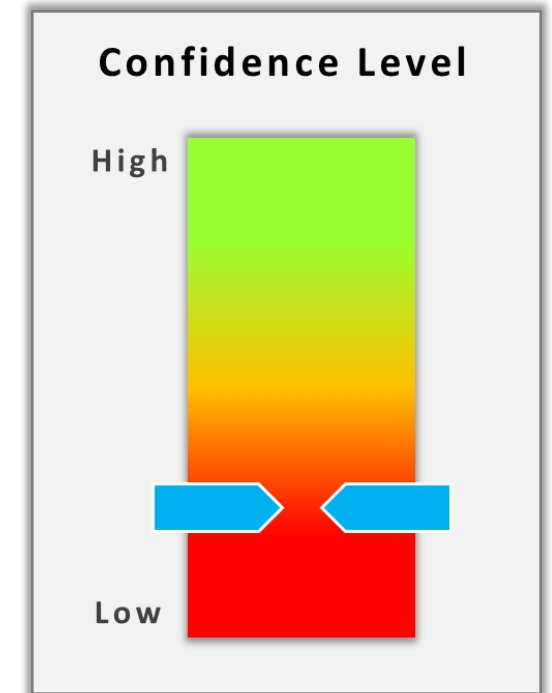
1. **Client Experience: Low** (never been performed)
2. **Previous Success Rate: n/a**
3. **Clarity of scope: Low** (not exactly sure what needs to be included)
4. **Industry Maturity: High**

Examples

(Assume The Owner Is A University)

Scope: Client needs to procure a new food-service contract. This is currently being done in-house and will be the first time outsourcing this service.

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***RFN
LIKELY***

Examples

(Assume The Owner Is A University)

Scope: Client is looking to purchase a new Travel Management System to bring more consistency in the organization. This will be a new service.

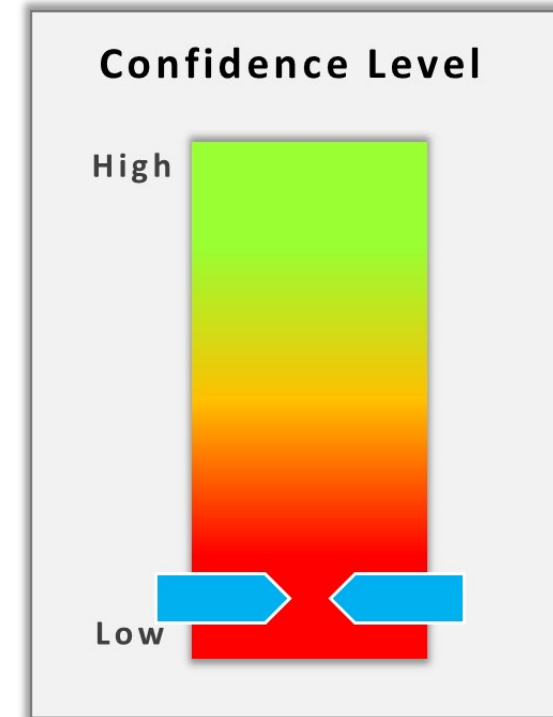
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Examples

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3. **Clarity of scope:** **Low** (not exactly sure what needs to be included)
4. **Industry Maturity:** **Low** (IT related project)

**RFN
LIKELY**

Examples

(Assume The Owner Is A University)

Scope: Client is looking to renew an existing HR Software contract. The current contract has been in place for 3-years and the client wants to purchase a different system.

1. **Client Experience:** **Low** (2 times in the past 10 years)
2. **Previous Success Rate:** **Low-Moderate** (many performance challenges)
3. **Clarity of scope:** **Moderate** (client feels good, but has some questions)
4. **Industry Maturity:** **Low** (IT related project)

Examples







(Assume The Owner Is A University)

Scope: Client is looking to renew an existing HR Software contract. The current contract has been in place for 3-years and the client wants to purchase a different system.

1. **Client Experience:** **Low** (3 times in the past 10 years)
2. **Previous Success Rate:** **Low-Moderate** (many performance challenges)
3. **Clarity of scope:** **Moderate** (client feels good, but has some questions)
4. **Industry Maturity:** **Low** (IT related project)

***RFN
LIKELY***

Summary

PROJECT SCOPE	Experience	Previous Success Rate	SOW Clarity	Industry Maturity	
Renovating office space in a building?	High	High	High	High	 <i>Unlikely</i>
Renovating lighting in a dormitory?	High	Moderate	Moderate	High	 <i>Unlikely</i>
Procuring a janitorial contract (renewal)?	Moderate	Moderate	High	High	 <i>Unlikely</i>
Procuring a new food service contract (new)?	Low	n/a	Low	High	 <i>LIKELY</i>
Procuring a new travel management system (new)?	Low	n/a	Low	Low	 <i>LIKELY</i>
Procuring a HR software contract (renewal)?	Low	Moderate	Moderate	Low	 <i>LIKELY</i>

Advanced RFN Practices

WRITTEN APPROACH



- Client creates & issues RFN document
- Suppliers prepare **written responses**
- Client SME's review
- **Client improves their SOW accordingly!**

VERBAL APPROACH



- Client creates & issues RFN document
- Suppliers **verbally present responses online**
- Client SME's ask follow-up questions
- **Client improves their SOW accordingly!**



Accelerated RFN

- **Rather than requesting a written response, perform entire RFN online (through video)**
- **Greatly minimizes vendor time (which encourages participation, and minimizes cut-and-paste material)**
- **Minimizes owner time (less time to prepare RFN, but much less time to participate in the proposals versus reading and digesting)**

