

# A Smarter RFP Process

## Getting Apples to Apples

**Alana F. Dunoff**

*Consultant, AFD Facility Planning*

*Adjunct Professor, Temple University, Villanova University*



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# Alana F. Dunoff

Strategic facility planner for over 20 years; adjunct professor for over 9 years.



## Education:

- M.S. in Facility Planning and Management from Cornell University
- B.S in Environmental Psychology from Boston University

## Experience:

- *President & Consultant, AFD Facility Planning* since 2002
- Associate Adjunct, Temple University, BS in Facility Management Program
- *Adjunct Instructor, Villanova University, FMP Credential*
- *Adjunct Professor, Moore College of Art & Design*
- *Project Manager & Design Principal, Little & Associates Architects*
- *Space Planning Analyst, Thomas Jefferson University & Hospital*
- *Strategic Planner, Pesce Associates, healthcare merger/master planning.*

## Professional:


- Presenter at WWP 2003, 2008-2012
- Chair of the new FM Educators SIG, 2010-present
- Advisory Chair Member Cornell University FM/DEA Program
- Advisory Board Member Community College of Philadelphia FM Program
- Advisory Board Member Temple University FM Program
- Director on the Board of Directors for IFMA 2003-2005

# A SMARTER RFP PROCESS

Getting Apples to Apples

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How do we make  
smart decisions?

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**Luck?**

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# Good Smart Data

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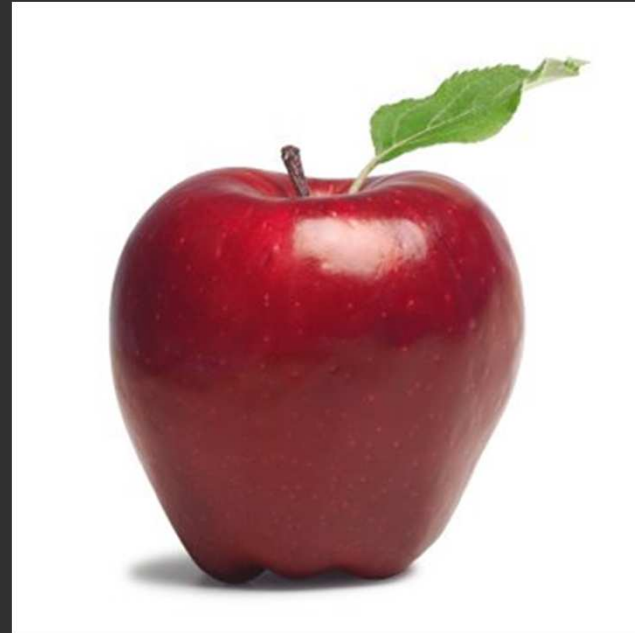
**Apples**

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**Apples**

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**Comparable data**

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## Apples

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## Bananas

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# What we get

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# Fruit Salad

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# Variation

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# The ideal

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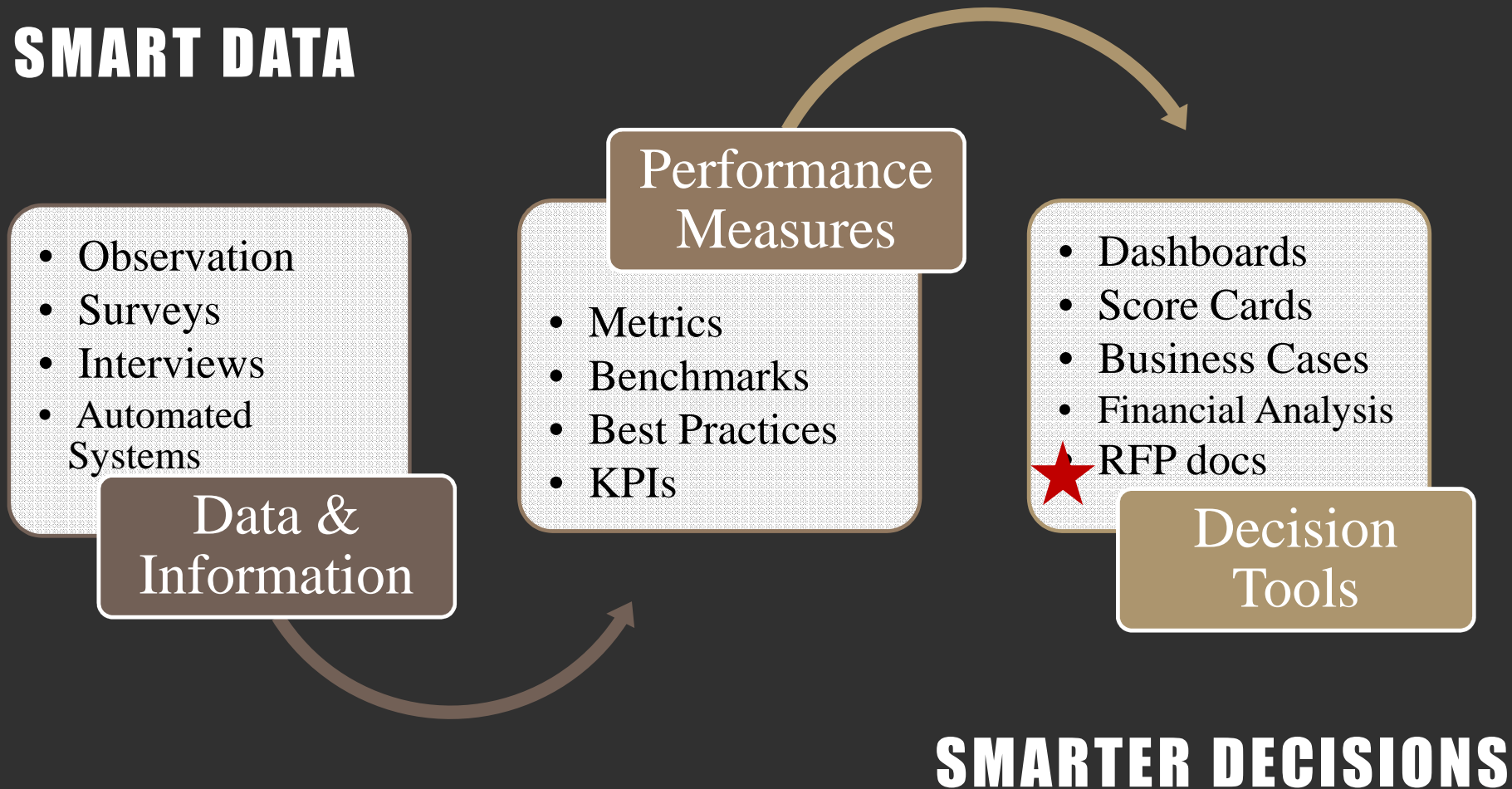
A Smarter RFP Process

**Turning Data into  
Actionable Knowledge**

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# Turning Data into Actionable Knowledge Model

## SMART DATA



1. RFP 101
2. Crafting the RFP Document (framework)
3. Getting Apples to Apples  
(aka quantitative comparative analysis)

# Agenda

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REQUEST FOR PROPOSAL (RFP) : Formal statement to vendors about service, work or product required.

- Document for finding solutions
- Bidders invited to submit a proposal
- Creativity and innovation count

# **1. RFP 101 - Definition**

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- RFI – Request for Information
- RFQ - Request for Qualifications
- RFP – Request for Proposal
- ITT – Invitation to Tender
- RFQ – Request for Quote
- Technical RFP

# **1. RFP 101 - Terminology**

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# 1. RFP 101- Procurement Process



## **2. CRAFTING THE RFP DOCUMENT**

Creating the framework

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- I don't have time
- I don't like to write
- I don't know what we want/need
- Procurement handles it

# Excuses

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- Builds a framework
- Everyone is on the same page
- Bidders have good information
  - Better responses
  - Better solutions
  - Better pricing
- Less time fussing
- Ownership in the process
- Creating new partnerships
- You have to live with the results
- Avoid fraud

# **Value of investing in RFP process**

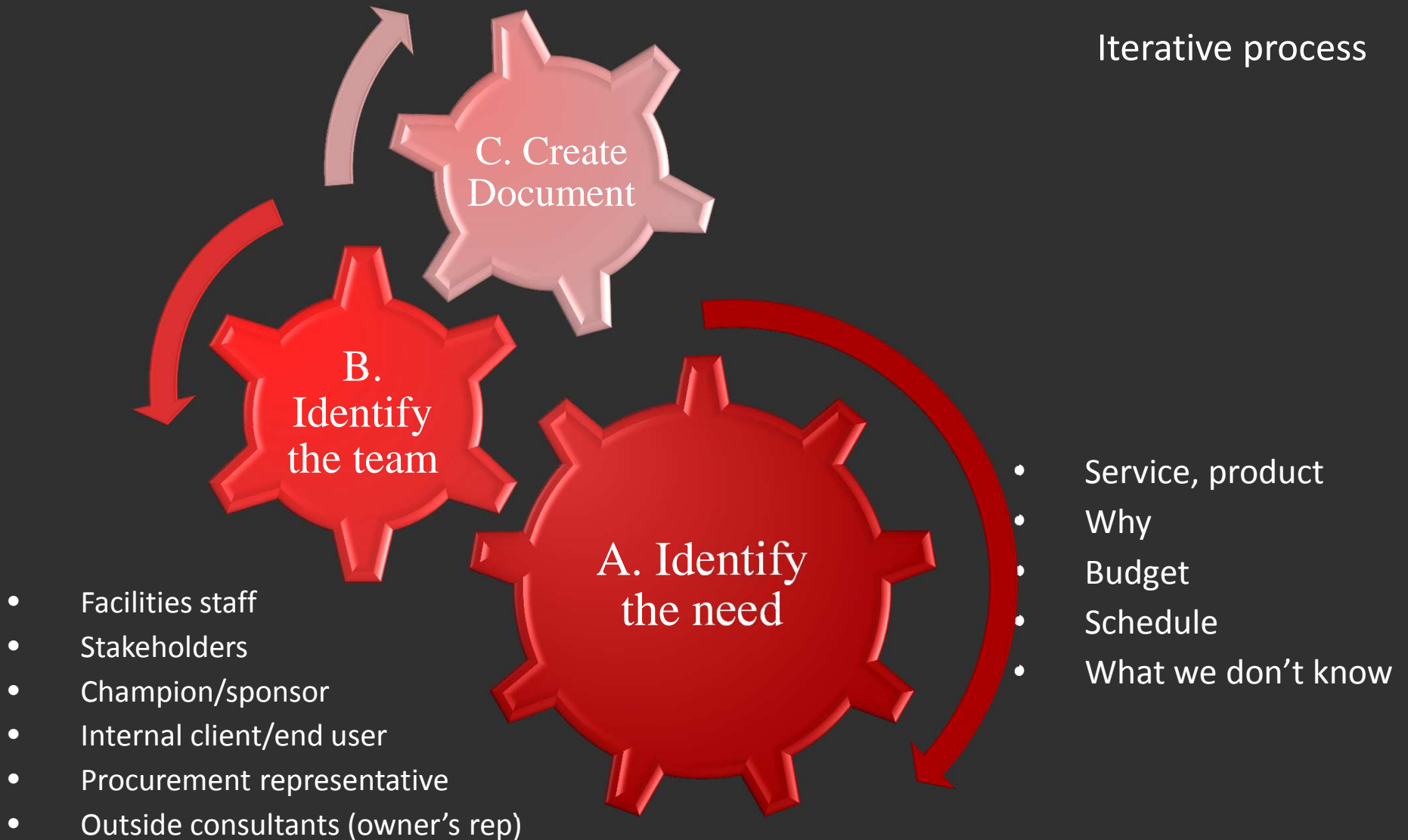
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# **Avoiding a Bad Apple**

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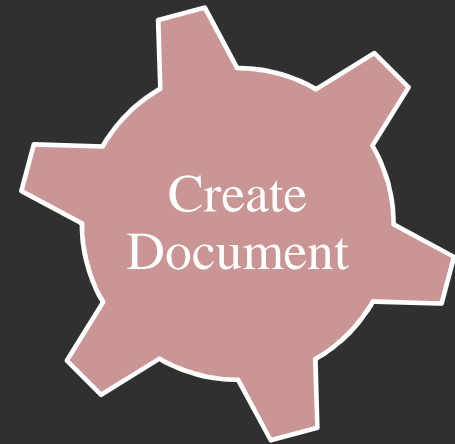
Iterative process



# Process of creating an RFP

## OUTLINE

- I. Background information
- II. Scope of work
- III. Submittal process
- IV. Terms & conditions
- V. Relevant documents



# C. Creating the document

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## I. BACKGROUND INFORMATION

- Your organization
- The project history
- Educate the readers
  - You want to them to understand your organization and your goals
- Keep it relevant
- Organization of the document

## C. Creating the Document

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## II. SCOPE OF WORK

- Clearly written objectives
- Specific/concise goals (2-3 max)
- Parameters – what is AND what it isn't
- Provide details; don't be vague
- Specialized requirements
- If not sure, tell them that too
- Decision criteria

## C. Creating the document

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## DECISION CRITERIA

- How will you select the winner?
- Let them know how they will be judged
- Develop quality measurements
  - Qualitative and quantitative
  - Performance measures

## **C. Creating the document**

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## TYPICAL CRITERIA

- Price
- Best value
- Firm qualifications
- Qualification of project team
- Similar project experience
- Approach/methodology
- Financial strength

(Rating Scale 1 to 5)- 1=Poor; 2=Below Average; 3=Average; 4=Above Average; 5=Outstanding

Vendor							
WRITTEN PROPOSAL RATING		Weight	Bus. Int.		Weighted Score	Weighted Score	
			Score	Score			Weight
Furniture							
■	Workstation/equipment (net pricing)	10	4.0	1.5	30.00%	24.00	9.00
■	Tables (net pricing)	6	2.0	3.0	18.00%	7.20	10.80
■	Chairs	4	2.5	4.0	12.00%	6.00	9.60
Sub-Total (Average)					60.00%	37.20	29.40
Other Pricing Factors							
■	Discount Term	10	2.0	2.5	22.22%	8.89	11.11
■	Warranties	6	5.0	3.0	13.33%	13.33	8.00
■	Installation	2	3.0	3.0	4.44%	2.67	2.67
Sub-Total (Average)					40.00%	24.90	21.79
TOTAL SCORE					100.00%	62.10	51.19

Weighted decision matrix

Weighted decision matrix

# Decision Criteria

## A. Furniture

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- Aesthetics
- Meet workplace Requirements (RFP)
- Flexibility
- Build quality
- Finish Quality
- Product life cycle

## B. Financial

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- Furniture Costs
- Discounts
- Warranties
- Installation

## C. Qualitative

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### Firm Qualifications

- Project Management
- Project Experience
- Financial Strength/Viability
- Schedule Quality

### General

- Creativity (of solution approach)
- Overall proposal (completeness)
- Aligns with vision of project
- Adheres to Specifications
- Adheres to Terms & Conditions

### Sustainability

- Solutions
- Recycling
- Approach

# Example Decision Criteria

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### III. SUBMITTAL PROCESSES (Nuts & Bolts)

- Deadlines & milestones
- Submission information
- Standard proposal formats (AIA)
- Bidder meetings
- How project will be awarded

Furniture RFP [Example](#)

## C. Creating the document

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#### IV. Terms & Conditions

- Standard procurement documentation

#### V. Relevant documents (appendix)

- Drawings
- Specifications, programming, design standards, adjacencies
- Service level agreement
- Special forms to completed & submitted
  - Include comparative analysis forms

## C. Creating the document

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# 2. GETTING APPLES TO APPLES

aka Comparative Analysis



## WE NEED CONSISTENT INFORMATION

- We need data in comparable formats
- We need numbers to be on OUR terms
  - Quantity, costs, hours, fees
- We don't need the extra homework

# Getting apples to apples

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Insist bidders utilize YOUR  
documentation  
to supply their information.

*A simple bidder sheet using excel  
will do the trick*

**Getting apples to apples**

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A: FURNITURE REQUIREMENTS

This document needs to be complete and submitted as part of your proposal. Please do not change existing columns or rows on this document. If you require additional columns or rows please add the

FURNITURE TYPE	QTY	QTY	NOTES	MANUFACTURER	PRODUCT LINE	PRODUCT YEAR/LIFE CYCLE	DESCRIPTION (FINISHES, OPTS)	LIST PRICE	DISCOUNT	UNIT SELL	EXTENDED SELL
<b>SEATING</b>											
Gallery	open	TBD	creative space, movable, flexible, functional								
Lobby/Visitors Lounge	open	TBD	creative opp, professional								
Lounge/Oasis - 2nd Floor	open	TBD	creative opportunity for 2-4 person collaborative envt								
Cafeteria	Sled	140	stackable, cleanable								
Coffee/Team Room (2nd flr.)	Sled	12	creative opportunity, could be stools instead								
Subtotal Sled		152									
Business Center (Southwest Corner)	Stools	6	2 high tops tables w/stools								
Subtotal Stools		6									
Ballroom	Task	200	pleather, high back, fixed arm								
Amphitheatre	Task	99	pleather, high back, fixed arm								
Amphitheatre - Control Room	Task	4	Room within the Amphitheatre								
B	Task	72	creative and flexible space; from lunch for approx. 72 to training tables with 6-8 persons and 2 monitors per table (round tables)								
B	Task	5	space for visitors to work, print etc.								
C	Task	12	1 room, 12 persons								
Conference B (BTC)	Task	12	1 room, 12 persons								
Medium Meeting Room (BTC)	Task	26	1 room, 26 persons								
Reception	Task	2	Within Lobby								
WebEx 1 (includes record rm)	Task	8	1 room, 8 persons								
WebEx 2	Task	10	1 room, 10 persons								
Conference - Dispatch	Task	12	1 room, 12 persons								
Conference Rooms (2nd flr)	Task	84	7 rooms, 12 person (includes HR)								
Conference Room - Security	Task	24	1 room, 24 persons								
Teaming Rooms (1- 1st flr, 4 - 2nd flr)	Task	35	5 rooms, 4 person								
Auditors Room	Task	10	1 room, 10 persons								
HR Interview Room	Task	4	1 room, 4 persons								
Subtotal Conference Rm Task Chairs		619	Pleather, Fixed Arms								
Workroom - Dispatch	Exec Task	12	12 work carrels								
AV Lab (1st floor)	Exec Task	10	1 room, 6 per table 7 millwork								
Forensic Lab	Exec Task	3	3 persons, built in desk								
Payroll Office	Exec Task	3	2 workstation plus extra seat								
Security Ops Room	Exec Task	5	5 work carrels								
Security Room (1st flr)	Exec Task	2	2 persons millwork								
			carrels								
			workstations								
			gh back, Adj Arm								

QTY

Specifics

Delivery  
Freight  
Installation  
Lead time  
Notes/comments

Over 1100  
chairs, 7  
different types

Conference Tables  
Training Tables  
Workstations  
Offices  
Accessories

Bid Sheet

APPENDIX A: FURNITURE REQUIREMENTS PREMIER, FINAL VERSION Sept 19, 2011

FURNITURE TYPE	TYPE	DIMEN	QTY	NOTES	PRODUCT LINE	PRODUCT YEAR/LIFE CYCLE	LIST PRICE	DISCOUNT	UNIT SELL	EXTENDED SELL	FREIGHT	DELIVERY	INSTALLATION	LEADTIME	DESCRIPTION
SEATING/LOUNGE															
Gallery Area 1 (1st Floor)	Lounge	Various	3	Flexible; Swoop Tables/Chairs	Swoop	2011	3,882.00	55.5%	575.83	1,727.49	N/A	x	\$ 769.65	5 weeks	Textile: Crossing/Green Apple; Finish: Light Anigre
Gallery Area 2 (1st Floor)	Lounge	Various	10	Flexible; Swoop Tables/Chairs	Swoop	2011	7,763.00	55.5%	383.79	3,454.09	N/A	x	\$ 1,949.75	5 weeks	Textiles: Crossing/Copper/Green Apple; Vinyl/Allspice; Finish: Light Anigre
Gallery Area	Side Chairs	Exec Sled	86	B&C Offices	Advo	2011	454.00	60%	181.60	15,617.60	N/A	x	\$ 1,219.35	5 weeks	Sled base: uphol. Seat/back Textile: Crossing, Black Frame
Southwest Co	Side Chairs	Exec Sled	2	Chef Office	Advo	2011	454.00	60%	181.60	363.20	N/A	x	\$ 28.35	5 weeks	Sled base: uphol. Seat/back Textile: Crossing, Black Frame
Southwest Co	Side Chairs	Exec Sled	2	Fitness Center	Advo	2011	454.00	60%	181.60	363.20	N/A	x	\$ 28.35	5 weeks	Sled base: uphol. Seat/back Textile: Crossing, Black Frame
Gallery Area	Side Chairs	Exec Sled	1	NERC	Advo	2011	454.00	60%	181.60	181.60	N/A	x	\$ 14.18	5 weeks	Sled base: uphol. Seat/back Textile: Crossing, Black Frame
Subtotal Exec Side - Sled			91							16,525.60			\$ 1,290.23		
WORKSURFACES - BTC															
Lounge/Oasis	Simulator Training														
HR Area															
Lobby/Visitor	Standard Training														
Cafeteria	Lobby/Gallery Tables														
Coffee/Team															
Coffee/Team	Auditors Room														
Coffee/Team	Kitchenette/2nd S														
Ballroom	WORKSPACE & SU														
Conference Room 2nd Floor	Breakout Room														
Amphitheatre	Cafeteria Tables														
Amphitheatre	Cafeteria Tables														
Amphitheatre	Adjustable Height														
Breakout Room	Conference A (C)														
Conference A	Conference B (C)														
Conference B	Conference - Dis														
Medium Meeting	Conference Room														
WebEx 1 (Inc	Conference Room														
WebEx 2	Conference Room														
Conference -	AV Lab (1st floor)														
	WebEx 2 (1st floor)														

4 - 11 x 17 pages of data from each vendor

FURNITURE TYPE	TYPE	QTY	NOTES	EXTENDED SELL 2nd round	EXTENDED SELL 2nd Round
<b>SEATING</b>					
Gallery	open	TBD	creative space, movable, flexible, functional	\$ 11,000.00	\$ 10,999.80
Lobby/Visitors Lounge	open	TBD	creative opp, professional	\$ 8,000.00	\$ 6,555.64
Cafeteria	Sled	140	stackable, cleanable	\$ 14,392.00	\$ 32,550.00
Coffee/Team Room (2nd flr.)	Sled	12	creative opportunity, could be stools instead	\$ 2,198.40	\$ 6,117.95
<b>Subtotal Sled</b>		<b>152</b>		<b>\$ 45,590.40</b>	<b>\$ 68,388.24</b>
Business Center (Southwest Corner)	Stools	6	2 high tops tables w/stools	\$ 1,099.20	\$ 7,846.44
<b>Subtotal Stools</b>		<b>6</b>		<b>\$ 1,099.20</b>	<b>\$ 7,846.44</b>
Ballroom	Task	200	pleather, high back, fixed arm	\$ 89,446.00	\$ 53,820.00
Amphitheatre	Task	99	pleather, high back, fixed arm	\$ 35,327.16	\$ 49,480.20
Amphitheatre - Control Room	Task	4	Room within the Amphitheatre	\$ 1,427.36	\$ 1,999.20
Classroom	Task	0	16 person, removed as of 2/11/2011		
Breakout Room	Task	72	72 to training tables with 6-8 persons and 2 monitors per	\$ 32,200.56	\$ 35,985.60
Business Center Carrels/Station	Task	5	space for visitors to work, print etc.	\$ 1,784.20	\$ 2,499.00
Conference A (BTC)	Task	12	1 room, 12 persons	\$ 4,282.08	\$ 5,997.00
Conference - Dispatch	Task	12	1 room, 12 persons	\$ 4,282.08	\$ 5,997.60
Conference Rooms (2nd flr)	Task	84	7 rooms, 12 person (includes HR)	\$ 29,974.56	\$ 41,983.20
<b>GRAND TOTAL WITH WORKTATION A</b>				<b>\$ 1,377,138.07</b>	<b>\$ 1,629,588.29</b>
<b>GRAND TOTAL WITH WORKTATION B</b>					
<b>Installation</b>				<b>\$ 209,771.03</b>	<b>\$ 213,365.35</b>
<b>HIGHEST GRAND TOTAL + INSTALL</b>				<b>\$ 1,586,909.10</b>	<b>\$ 1,842,953.64</b>
<b>Average Discount</b>					

# Comparative Analysis

## Summary/Variance

			Difference
Total Chairs	\$ 304,015.72	\$ 352,750.08	\$ (48,734.36)
Total Tables	\$ 210,604.17	\$ 222,260.91	\$ (11,656.74)
Workstation	\$ 717,810.80	\$ 912,925.00	\$ (195,114.20)
Offices	\$ 79,936.13	\$ 82,686.08	\$ (2,749.95)
Carrels	\$ 20,732.45	\$ 12,510.72	\$ 8,221.73
Filing	\$ 44,038.80	\$ 46,455.50	\$ (2,416.70)
<b>Total Furniture</b>	<b>\$ 1,377,138.07</b>	<b>\$ 1,629,588.29</b>	<b>\$ (252,450.22)</b>
Installation	\$ 209,771.03	\$ 213,365.35	\$ (3,594.32)
<b>Total Furniture &amp; Install.</b>	<b>\$ 1,586,909.10</b>	<b>\$ 1,842,953.64</b>	<b>\$ (256,044.54)</b>



Another example

**Moving RFP**

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## Scope of Work

The selected moving company shall:

- Move the contents of each employee's workspace to the CTC to include: 4-6 boxes of employee files/materials, docking station, monitor(s), keyboard, and task chair (items will be uniquely labeled by PJM)
- Disconnect/Re-connect desktops, docking stations, monitors, and keyboards (the "Computer Equipment") Bag/box and label the Computer Equipment
- Move contents of shared filing cabinets to CTC (contents will be packed in boxes by staff—filing cabinets will not be moved)
- Move confidential/sensitive files from HR and Finance (provide secure cartons that will ensure the security of contents)
- Provide, in advance of move, cartons to be used for packing workspace and file cabinet contents
- Provide, in advance of move, 12 different color moving labels

The move will take place over two weekends. The first move will involve approximately 130 employees and will begin the afternoon of Friday, January 27, 2012 and will be completed by Sunday evening. The second move will involve the remaining employees and will commence the afternoon of February 3, 2012 and will be completed by Sunday evening.

# Scope of Services

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# What we got

Materials / Equipment:	Number	Days	Rate	Cost
Cartons	1956	1	\$2.00	\$3,912.00
Keyboard bags	250	1	\$0.50	\$125.00
Secure Totes	126	1	\$2.50	\$315.00
Carpet shields	2	1	\$80.00	\$160.00
Delivery Charge	2	1	\$100.00	\$200.00
Pick-Ups	4	1	\$100.00	\$400.00
Total Materials				\$5,112.00

Valuation: (Choose One)	Number	Rate	Cost
\$50,000/V/P @ \$250 Ded	4	\$150.00	\$600.00
\$0.00 per pound		\$0.00	\$0.00
Total Valuation			\$600.00

Prep 1:00-2:45	Men	Hours	Rate	Cost
Van	3	1.75	\$30.00	\$157.50
Driver(s)	3	1.75	\$35.00	\$183.75
Helper(s)	7	1.75	\$32.00	\$392.00
Supervisor(s)	2	1.75	\$38.00	\$133.00
Disconnect IT	249		\$10.50	\$2,614.50
Desktop Printers	45		\$5.50	\$247.50
Shared Printers	24		\$5.50	\$132.00
Total				\$3,860.25

Round Robin 2:45-6:00	Men	Hours	Rate	Cost
Van(s)	3	3.25	\$30.00	\$292.50
Driver(s)	3	3.25	\$36.00	\$351.00
Helper(s)	13	3.25	\$32.00	\$1,352.00
Supervisor	2	3.25	\$38.00	\$247.00
Total Loading				\$3,242.50

Round Robin 6:00-11:15	Men	Hours	Rate	Cost
Van(s)	3	5.25	\$30.00	\$472.50
Driver(s)	3	5.25	\$45.00	\$708.75
Helper(s)	13	5.25	\$38.00	\$2,393.50
Supervisor(s)	2	5.25	\$45.00	\$472.50
Total				\$4,247.25

Travel Time	Men	Hours	Rate	Cost
Van	3	1	\$30.00	\$90.00
Driver(s)	3	1	\$45.00	\$135.00
Helper(s)	13	1	\$38.00	\$494.00
Supervisor(s)	2	1	\$45.00	\$90.00
Total Travel Time				\$809.00

## Remove - Destination

### Straight Time

1-Driver & Trailer @ \$80.00	\$80.00
4-Additional Men @ \$40.00	\$160.00
1-Supervisor @ \$47.00	\$47.00
	\$287.00
Estimated Time	2 Hours
	\$574.00

### Move

#### Straight Time

3-Drivers & Vans @ \$80.00	\$240.00
24-Additional Men @ \$40.00	\$960.00
2-Supervisor @ \$47.00	\$94.00
	\$1,294.00
Estimated Time	4 Hours
	\$5,176.00

### Overtime

3-Drivers & Vans @ \$100.00	\$300.00
24-Additional Men @ \$58.00	\$1,392.00
2-Supervisors @ \$66.00	\$132.00
	\$1,824.00
Estimated Time	6 Hours
	\$10,944.00
One Hour Travel Charge	\$1,824.00
	\$18,518.00

2% Insurance Surcharge	\$370.36
4% Fuel Surcharge	\$740.72
	\$10,629.08

### Materials

996 Totes @ \$3.00	\$2988.00
Delivery Charge	\$525.00
Pickup Charge	\$525.00
996 Totes @ \$1.50	(\$1494.00)
128 Tyga Boxes (rental per month) @ \$3.75	\$480.00
2 Rolls Duct Tape @ \$12.00	\$24.00
2 Rolls Stretch Wrap @ \$27.50	\$55.00
127 Keyboard Bags @ \$1.00	\$127.00
127 Monitor Bags @ \$2.00	\$254.00
2 Rolls Masking Tape @ \$10.00	\$20.00
	\$3,504.00



## M Move Relocation Proposal Bid Sheet

Company Name:

15-N

Please use the spreadsheet below to provide your financial proposal. Fill in gray areas as appropriate.

You may add rows of additional information as needed at the bottom of each section.

Please use the following data in your proposals:

Total number of persons relocating is currently 249. We are still fine tuning these numbers.

Move # 1 Jan 27th, 127 persons: BC1-1 - 65p; BC 2 -12p; Tech Ctr 50p

Move # 2 Feb 3rd, 122 persons: BC1-2 89p; BC2/3 -8p; Control Ctr - 3p; Service Ctr - 22p

Expected move start time is 1pm on both Fridays

Expected completion time is:

Labor, please provide hourly rates for your project team:

Hrly Rate

Driver & Van

Helper/Packer

Supervisor

Other -

Other -

Relocation Services

QTY

No. Hrs.

Fee

Box drop off (3 weeks prior to move assume 2 drop offs)

Box pick up (assume 4 pick ups)

Disconnect/ Reconnect Computer Equipment 249 persons (1)

249

Day of Relocation Services - Standard Time

Day of Relocation Services - Overtime, if required

Disconnect and relocate desk top printers in offices

45

Disconnect and relocate shared printers (may not remain in SOW)

24

Computer Equipment (Tech Center )more info after bid award (4)

TBD

Post move 'trouble shooting ' (available on site Jan 30th, Feb 6th)

Other-

Other-

Equipment Rental & Materials

QTY

No. Hrs.

Fee

Totes for employees approximately 4/person

996

Totes for Shared Files (160 4 high files)(2)

960

Boxes/Secured Filing HR & Payroll (approx. 21 4 high files) (3)

126

Tags/Totes for Computer Equipment

Building protection (floor/walls)

Other Materials -

Other Materials -

Other Materials -

Other Fees

No. Hrs.

Fee

Travel Time

Insurance Surcharge at %

Other -

TOTAL HOURS / FEE

# Bid Sheet

Labor

Service

Material

Fees





## Relocation Proposal Bid Comparison

28-Nov-11

## Time estimates

Expected completion time

provide hourly rates for your project team:

			1pm - 9/10pm		11am - 11pm		1-11:45, S 8-11:30
		Hrly Rate	Overtime	Hrly Rate	Overtime	Hrly Rate	Overtime
Driver & van		\$ 65.00	\$72.00	\$ 80.00	\$ 100.00	\$ 65.00	\$ 75.00
Helper/Packer		\$ 34.00	\$40.00	\$ 40.00	\$ 58.00	\$ 32.00	\$ 38.00
Supervisor		\$ 40.00	\$48.00	\$ 47.00	\$ 55.00	\$ 38.00	\$ 45.00
Other - Computer Tech (per unit)		\$ 55.00	\$55.00	\$ 40.00			
Other -							
<b>Relocation Services</b>	<b>QTY</b>	<b>No. Hrs.</b>	<b>Fee</b>	<b>No. Hrs.</b>	<b>Fee</b>	<b>No. Hrs.</b>	<b>Fee</b>
Box Delivery (3 weeks prior to move assume 2 drop offs)	2		\$ 1,000.00		\$ 1,248.00		\$ 200.00
Box pick up (assume 4 pick ups)	4		\$ 1,000.00		\$ 1,248.00		\$ 400.00
Disconnect/ Reconnect Computer Equipment 249 persons (1)	249	96.00	\$ 5,280.00	40.00	\$ 9,960.00		\$ 5,229.00
Day of Relocation Services - Standard Time Move 1 & 2			\$ 5,808.00	256.00	\$ 11,500.00		\$ 6,217.50
Day of Relocation Services - Overtime, if required Move 1 & 2			\$ 7,680.00	406.00	\$ 21,888.00		\$ 15,831.00
Disconnect and relocate desk top printers in offices	45	8.00	\$ 440.00	20.00	\$ 900.00		\$ 495.00
Disconnect and relocate shared printers (may not remain in SOW)	24	4.00	\$ 220.00	20.00	\$ 480.00		\$ 264.00
Computer Equipment (Tech Center )more info after bid award (4)	TBD						
Post move 'trouble shooting ' (available on site Jan 30th, Feb 6th)	2 hrs	525.00	\$ 1,050.00	30.00	\$ 1,336.00		\$ 2,000.00
Other - Troubleshooting (1 Van & Driver & 1 Supervisor for 5 hours)		-	\$ -				
Other-							
<b>Subtotals</b>		633.00	\$ 22,478.00	772.00	\$ 48,560.00		\$ 30,636.50
<b>Materials</b>	<b>QTY</b>	<b>Unit \$</b>	<b>Fee</b>	<b>Unit \$</b>	<b>Fee</b>	<b>Unit \$</b>	<b>Fee</b>
Totes for employees approximatel	996	\$2.00	\$ 1,992.00	\$ 3.75	\$ 3,735.00	2.25	\$ 2,241.00
Totes for Shared Files (160 4 high fi	968	\$2.00	\$ 1,920.00	\$ 3.75	\$ 3,600.00	2.25	\$ 2,160.00
Boxes/Secured Filing HR & Payroll (	126	\$2.00	\$252.00	\$ 3.75	\$ 480.00	2.50	\$ 315.00
Bags/Totes for Computer Equipment		\$1.00	\$ 250.00		\$ 381.00	50.00	\$ 125.00
Building protection (floor/walls)			\$ 225.00		\$ 88.00		\$ 160.00
Other Materials - shrink wrap					\$ 110.00		
Other Materials -labels			\$ 150.00				
Other Materials - zip ties			\$ 50.00				
Other Materials - Optional File Carts	125					option 2	
Other Materials - credit for Cardboard returned/used totes		\$2.50 for unreturned		\$ 1.50	\$ (2,934.00)		
			\$ 4,839.00		\$ 8,394.00		\$ 5,001.00
<b>Other Fees</b>			<b>Fee</b>		<b>Fee</b>		<b>Fee</b>
Travel Time					\$ 3,804.00		\$ 3,236.00
Insurance Surcharge at 2 %			\$ 1,000.00		\$ 774.12		\$ 1,200.00
Other - Fuel surcharge 4%			\$ -		\$ 1,548.24		
Safety Clearance (time for doing PJM Security)			\$ 1,200.00				
Reduction of Staffing for TVGA			\$ (1,184.00)		\$ (6,174.47)		
			\$ 1,016.00		\$ 6,126.36		\$ 4,436.00
		633.00	\$ 28,133.00	772.00	\$ 53,971.89	-	\$ 40,073.50

Tote rental

High Lagging factor \$28K-\$54K

# Comparative Analysis

## Boxes vs. Totes

	QTY	Vendor	Material	Manpower	Material	Manpower
<b>Cardboard Carton New</b>	<b>2082</b>	\$ 1.50	\$ 3,123.00	\$ 3.00	\$ 6,246.00	\$ 2.00 \$ 4,164.00
Credit for return used				\$ 1.50	\$ 3,123.00	\$ 1.00 \$ 2,082.00
Credit for return unused				\$ 3.00		
Delivery (2)		\$ 600.00		inc		inc
Pick up (4)		\$ 600.00		\$ 735.00		\$ 400.00
<b>Cardboard Carton Used</b>	<b>2082</b>	\$ 0.50	\$ 1,041.00	\$ 1.50	\$ 3,123.00	\$ 0.25 \$ 520.50
Delivery (2)		\$ 600.00		inc		inc
Pick up (4)		\$ 600.00		\$ 735.00		\$ 400.00
<b>Tyga/Plastic Carton</b>	<b>2082</b>	\$ 2.00	\$ 4,164.00	\$ 3.75	\$ 7,807.50	\$ 2.25 \$ 4,684.50
Delivery (2)		\$ 1,000.00		\$ 1,248.00		inc
Pick up (4)		\$ 1,000.00		\$ 1,248.00		\$ 400.00
Replacement costs -Tyga crates		\$ 22.00		\$ 35.00		
Replacement costs -Tyga dollies				\$ 52.00		


One vendor had cardboard boxes in their original proposal the others the plastic rentals. Made a difference in fees –plastic higher materials fees, but lower manpower costs.

As there would be a reduction in time they included time to change identifies a savings of \$

- \* Crates would be easiest for employees
- \* Crates must be returned with a
- \* Crates are bulkier and will clutter

# Why the details matter



- 
1. Smart RFP Document
  2. Comparative Analysis bidder/data sheet
  3. Weighted Decision Matrices (next time)

**One more smart tool**

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## Vendor Evaluation Form for

Monroe

(Rating Scale 1 to 5)- 1=Poor; 2=Below Average; 3=Average; 4=Above Average; 5=Outstanding

## Vendor

Remember all those criteria

## WRITTEN PROPOSAL RATING

## Workstation

	Weight	Score	Score	Score	Score	Weight	Weighted Score	Weighted Score	Weighted Score	Weighted Score
■ Aesthetic overall (like it?)	10	3.0	3.5	5.0	4.0	11.55%	6.92	8.08	11.54	9.23
■ Meets workplace criteria (in the RFP)	8	3.0	3.0	3.5	3.5	9.24%	5.53	5.53	6.46	6.46
■ Flexibility (adjustability)	6	3.0	3.0	4.0	3.5	6.93%	4.15	4.15	5.53	4.84
■ Build Quality	10	3.0	3.0	4.0	3.5	11.55%	6.92	6.92	9.23	8.08
■ Finish Quality	10	3.0	3.5	3.5	3.0	11.55%	6.92	8.08	8.08	6.92
■ Product Life Cycle (not end of)	8	3.0	3.0	3.0	3.0	9.24%	5.53	5.53	5.53	5.53
Sub-Total (Average)						60.00%	35.97	38.29	46.37	41.06

## Tables

■ Aesthetic overall (like it?)	10	3.0	3.0	3.0	3.0	3.85%	2.31	2.31	2.31	2.31
■ Meet workplace criteria (in the RFP)	8	2.5	3.0	3.0	5.0	3.08%	1.54	1.85	1.85	3.08
■ Flexibility (adjustability)	6	3.0	3.0	2.5	3.0	2.31%	1.38	1.38	1.15	1.38
■ Build Quality	10	3.0	3.0	3.5	3.0	3.85%	2.31	2.31	2.69	2.31
■ Finish Quality	10	3.5	3.5	3.5	2.5	3.85%	2.69	2.69	2.69	1.92
■ Product Life Cycle (not end of)	8	3.0	3.0	3.0	3.0	3.08%	1.85	1.85	1.85	1.85
Sub-Total (Average)						20.00%	12.06	12.37	12.52	12.83

## Other Chairs (cafeteria, guest seating, lounge)

■ Aesthetic overall (like it?)	10	4.0	3.0	5.0	4.0	0.96%	0.77	0.58	0.96	0.77
■ Meet workplace criteria (in the RFP)	8	3.0	3.0	3.5	3.0	0.77%	0.46	0.46	0.54	0.46
■ Flexibility (adjustability)	6	3.0	3.0	3.5	3.0	0.58%	0.35	0.35	0.40	0.35
■ Build Quality	10	3.0	4.0	4.0	3.0	0.96%	0.58	0.77	0.77	0.58
■ Finish Quality	10	3.0	4.0	4.0	3.0	0.96%	0.58	0.77	0.77	0.58
■ Product Life Cycle (not end of)	8	3.0	3.0	3.0	3.0	0.77%	0.46	0.46	0.46	0.46
Sub-Total (Average)						5.00%	3.20	3.39	3.90	3.20

## Training/Conference Chairs

■ Aesthetic overall (like it?)	10	4.0	3.0	5.0	4.0	2.89%	2.31	1.73	2.89	2.31
■ Meet workplace criteria (in the RFP)	8	3.0	2.5	3.0	3.0	2.31%	1.38	1.15	1.38	1.38
■ Flexibility (adjustability)	6	4.0	4.0	4.0	4.5	1.73%	1.38	1.38	1.38	1.56
■ Build Quality	10	3.0	4.0	4.0	3.0	2.89%	1.73	2.31	2.31	1.73
■ Finish Quality	10	3.0	4.0	4.0	3.0	2.89%	1.73	2.31	2.31	1.73
■ Product Life Cycle (not end of)	8	3.0	3.0	3.0	3.0	2.31%	1.38	1.38	1.38	1.38
Sub-Total (Average)						15.00%	9.89	10.24	11.63	10.07

## TOTAL SCORE

100.00% 61.12 64.29 74.42 67.16

Part 1:  
Furniture  
Evaluation

1. Invest the time in crafting a smart RFP document
  - Encourage smarter responses
  - Can be a template
2. Insist that the data be consistent
  - Provide the format
3. Beginning of a partnership
  - Put your best foot forward - to get the best
4. Take ownership, you have to live with the results
5. Smart efficient tools to help make smart decisions

Turning Data into Actionable Knowledge

## 5 final thoughts

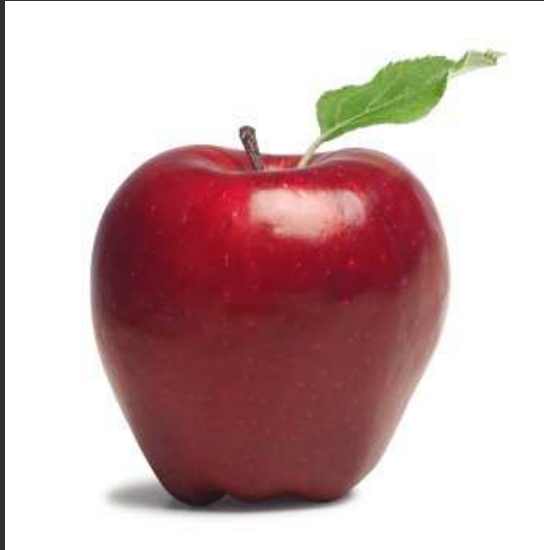
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**QUESTIONS?**

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*Thank you!*  
*Feel free to leave a card and*  
*I'll send you the presentation.*

*- Alana F. Duroff*

*My presentation today is dedicated to the memory*  
*of Shari Epstein, a long time friend of IFMA*



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