

Developing High Quality RFP's and Bids to Maximize Funding

*2012 Florida Recreation and Park Association
Annual Conference*

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The Woodlands Township
The Woodlands, Texas*

Before we start.....

- What is your experience with writing bids and RFP's?
- What are the issues you commonly have with bidding out?



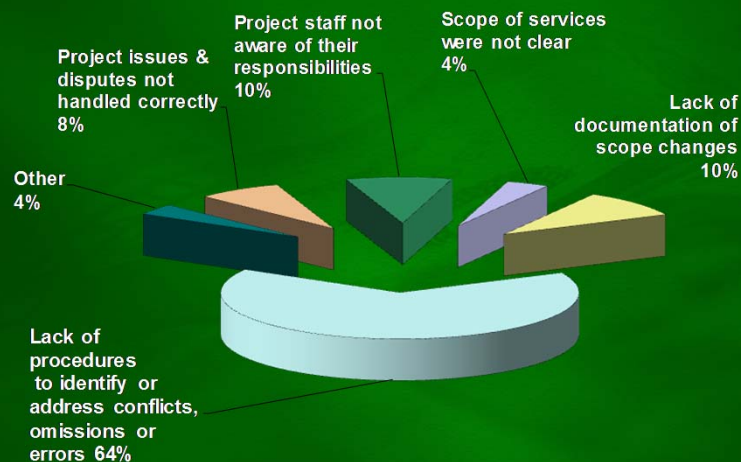
Objectives.....

- Identify the needed planning for the development of bid documents
- Create a packet of information for bidders to utilize
- Develop a systematic review and recommendation process



Background Information

Communication issues when Bidding



Background Information

- Successful Bidding and RFP writing equates to
 - Knowing what you want
 - *Describing it accurately*
 - Recognizing what resources you need
 - *Describing them accurately*
 - Hire the contractor that has the right stuff
 - Use tools to hold contractor accountable

Background Information

- Successful Bidding and RFP writing equates to
 - Fair and competition
 - Stewardship of funds
 - Avoid legal challenges



Background Information

- What costs are associated with bidding from the agency side?
 - Staff time
 - Staff productivity
 - Packet production
 - Advertisement
 - Other



Background Information

- Are there any costs from the vendors or contractors side?



Background Information

- Typical firm costs for submitting an RFP
 - 22.6 hours for each response for the lead
 - Double that to account for the vendor's employees' time – about 50 hours.
 - If the vendor does 50 responses a year – that's 2,500 hours! At \$125/hour, this is over \$300k per year!

Background Information

What you want

- Reasonable cost
- Low risk
- Reliable outcome
- Happy Board
- On time
- No bad press
- Quality

What they want



Planning

- Proposal objectives
- Timeline
- Political Issues
- Staff capabilities
- Evaluation
- Insurance Requirements
- Contract



Planning

- Proposal Objectives
 - What are your.....
 - Needs
 - Wants
 - Nice to Haves
 - Preferences
 - Community Standards



Planning

What is the timeline for the....

- proposal?
- project?



Planning

Timeline

- Bidder is required to submit three (3) references of previous projects of similar or like nature.
- Bid prices shall be firm for 60 days from bid opening.
- Unit prices shall remain in effect for the length of this agreement (October 2010-September 2013).

PROJECT TIME LINE

- Release Request for Proposal – Week of January 9, 2011
- Deadline for Proposals – January 28, 2010 1:00 pm
- Evaluation of Proposals – Week of January 31, 2011
- Interviews (if needed) – February 4, 2011
- Approval and Award of Bid to Successful Consultant – February 23, 2011
- Public Meeting/Information Gathering- March, 2011
- Preliminary Concept/Documents (30% Drawings)- April 8, 2011
- Preliminary Concept/Documents (60% Drawings)-May 8, 2011
- Preliminary Concept/Documents (90% Drawings)-June 8, 2011
- Finalized Construction/Bid Documents-June 17, 2011
- Construction Sawmill Park Renovation Release of Bid- June 24, 2011
- Sawmill Park Renovation Pre-Bid Meeting- July 8, 2011
- Sawmill Park Renovation Bid Due- July 29, 2011
- Approval and Award of Bid to Successful Contractor for the Sawmill Park Renovation – August 24, 2011
- Construction Commencement- September 26, 2011

Planning

- Political and Market Place Issues
 - Local preference
 - Prevailing wages
 - Labor/Unions
 - Board “friends”
 - Local marketplace
 - In House vs. Out-sourcing
 - MBE/WBE



Planning

- Staff Capabilities
 - Write specifications
 - Evaluate
 - Be objectionable
 - Time to devote?
 - Time to manage?



The same contractor should never define the work, then bid on it, do the work or evaluate the work, i.e. conflict of interest

Planning

Evaluation

- How do I evaluate?
- What do I evaluate?
- Bid vs. a proposal
- Evaluation team
- Scoring matrix
- “Bid conditioning”
- Time needed



Planning

- Insurance
 - Level of risk
 - Contractor's ability to obtain
 - Waiver's
 - Indemnification
 - Bid Bonds
 - Payment Bonds
 - Performance Bonds



Planning

Insurance Requirement

Vendor agrees to maintain and require its subcontractors to maintain at all times the following coverage at no less than the limits indicated:

Worker's Compensation Insurance -	Statutory	
Employers Liability -	\$100,000	
Automobile Liability (Including Owned and Non-Owned autos)		
Bodily Injury -	\$250,000 each person	
-	\$500,000 each occurrence	
Property Damage -	\$100,000 each occurrence	
Commercial General Liability		
Combined Single Limits for Bodily Injury and Property Damage:		
Each occurrence for premises/operations:		
Broad form CGL liability coverage	\$1,000,000	-
Products/ Operations aggregate	\$1,000,000	-
Advertising Injury -	\$1,000,000	-
General Aggregate -	\$2,000,000	-
Umbrella Liability		
-	\$1,000,000 each occurrence	
-	\$1,000,000 annual aggregate	
-	\$ 25,000 self insured retention	

Packet Development

- Before you start developing a RFP/Bid.....STOP
 - Reuse, Revise, Reinvent..... Google is your friend!
 - What are you bidding-service, supply, construction



Packet Development

- *Introduction/Scope*
- *Mandatory Requirements*
- *Specifications and Standards*
- *Supplemental Information*
- *Implementation*
- *Evaluation*



Packet Development

- *Introduction/Scope*
 - *Who, what, where, when.....*
 - *Agency information*
 - *Project information*
 - *Lead staff person*



Packet Development

Project Scope: *Selected Contractor will provide Custodial/Gate Facility Maintenance at parks, facilities and other amenities in The Woodlands Township. This shall include cleaning restrooms, opening/closing gates, cleaning benches, and providing other cleaning services at selected facilities.*



REQUEST FOR PROPOSAL/QUALIFICATIONS SAWMILL PARK RENOVATION THE WOODLANDS TOWNSHIP JANUARY 2011

The Woodlands Township is requesting proposals and statements of qualifications from planning/design consultants and/or similar professionally qualified consultants to provide comprehensive design, bidding and construction management services for the renovation of Sawmill Park.

ABOUT SAWMILL PARK

Sawmill Park is a 6.5 acre Village Park located in the Village of Grogan's Mill (2200 Mill Trace Drive), directly to the west of First Baptist Church of The Woodlands. The park can be accessed via the pathway system from several points of entry: Grogan's Mill Road, Hailey Elementary School and the Woodfarm neighborhood.

Packet Development

• Scope-Needs Assessment

projects and help identify funding mechanisms.

- b. Project B- Verify and assess the current environment of competitive aquatic facilities in the community, the needs and projections of the aquatic organizations, determine a projected level of service and the necessary facilities to meet the current and future needs. The consultant will evaluate available and potential sites and develop conceptual plans, capital and operational cost projects and help identify funding mechanisms.

- c. Project C- Examine the park system and address questions such as: usage and participation rates; comparison of the number of parks and pools in the system relative to other communities, national standards, resident needs/ desires; cost/benefit analysis for parks, pools and amenities; condition evaluation of existing facilities; assessment of trails, running and natural, and bicycle path needs (different than typical pathways); assess needs for other recreational amenities that may not currently be provided or are not provided to a level necessary to meet current and future community needs.

Packet Development

- Mandatory requirements
 - Brief, specific and measurable
 - “Complies” or “Does not comply”



YES



NO



MAYBE

Packet Development

Item #	Description of Requirements	Bidder's Acknowledgement
1	Any quantity specified is an estimate only. The Woodlands Township will purchase the quantities necessary, at various times, to perform the intended operation.	
2	Bid prices shall be inclusive of all fees, delivery charges, pallet/cylinder charges, etc.	
Contract Term		
3	The contract for these services, if awarded, shall be for twelve (12) months (January 2012-December 2012).	
Standard of Conduct and Appearance		
4	Adherence to image standards – meaning each employee will be identified by a company uniform (shirt, pants or cap) and vehicles will be clean and all marked with company name.	
5	Contractor shall behave and operate in an environmentally sound and professional way, as to not create damage or cause exposure by virtue of negligence or omission.	

Packet Development

- Typical Mandatory Requirements
 - Uniforms/Image
 - Insurance
 - OSHA
 - Permits/Licenses
 - Payment Terms
 - Submittal Requirements
 - References
 - Bidder's Questionnaire
 - Samples



Packet Development

2010 Pool Deck Refurbishment

- The Woodlands Township reserves the right to accept or reject any and all proposals, to accept any proposal deemed advantageous and to waive irregularity in the proposals.
- By bidding, the bidder acknowledges and will adhere to all bid specifications as stated within this bid packet.
- Bidder is required to submit three (3) references of previous projects of similar or like nature.
- Manufacturer's specifications (design guide), when used are to be considered informative to give the bidder information as to the type and kind requested. Proposals of any reputable manufacturer's regularly produced product of such item similar and substantially equivalent will be considered.
- Bid prices shall be firm for 60 days from bid opening.
- The successful bidder must be able to provide high quality customer service
- Unit prices shall remain in effect for the length of this agreement.
- Evaluation of bid takes into account the following considerations: price, quality, delivery schedule, vendor's service and date of proposed delivery and placement.
- All Bids must be made on the required BID TABULATION FORM. All blank spaces for BID prices must be filled in, in ink or typewritten, and the BID form must be fully completed and executed when submitted.
- Payment will be made by The Woodlands Township within thirty (30) calendar days after completion of project.

Packet Development

BIDDERS QUESTIONNAIRE

This questionnaire is to be submitted in conjunction with, and is a part of, the proposal for operating concessions in The Woodlands Township. Information contained in this questionnaire is CONFIDENTIAL and may be verified. All questions must be answered in full. If additional space is required, please attach additional sheet(s).

WHAT IS YOUR PRESENT BUSINESS AND/OR EMPLOYMENT?

A. FOR HOW LONG? _____

B. IF EMPLOYED, WHAT IS YOUR CURRENT MONTHLY SALARY? _____

C. WHERE ARE YOU EMPLOYED AND BY WHOM? _____

D. DO YOU INTEND TO CONTINUE THIS EMPLOYMENT? _____

E. IS THIS CONCESSION BUSINESS A SOLE PROPRIETORSHIP, CORPORATION, PARTNERSHIP, OR OTHER?

EXPLAIN:

F. IF SOLE PROPRIETORSHIP, ARE YOU THE OWNER? _____

WHAT IS YOUR ROLE IN THE BUSINESS?

Packet Development

I. IF YOU OR YOUR BUSINESS HAS BEEN, OR ARE CURRENTLY INVOLVED IN ANY LITIGATION, DESCRIBE.

J. FURNISH NAMES AND ADDRESSES FOR ALL BANKS IN WHICH YOU AND YOUR BUSINESS HAVE ACCOUNTS.

K. GIVE NAMES AND ADDRESSES OF AT LEAST THREE FIRMS WITH WHOM YOU HAVE HAD ACCOUNTS DURING THE PAST THREE YEARS.

L. GIVE ANY OTHER INFORMATION CONCERNING YOUR PRESENT BUSINESS OR EMPLOYMENT WHICH YOU FEEL IS PERTINENT.

Packet Development

- Specifications:
 - Industry Standards
 - Best Practices
 - User Needs
 - Community Needs
 - How would you do the job?
 - What else????



Packet Development-Specifications

- How would you do the job?



Packet Development-Specifications

- Specifications-Pool Chemicals

13	Muriatic/Sulfuric acid must be delivered in 30 gallon drums or 1 gallon bottles for spraygrounds.
14	It shall be the vendor's responsibility to have the proper fittings to connect to the existing fittings at each delivery site.
15	It shall be the vendor's responsibility to properly cleanup any chemical spills and be responsible for any damages caused by any spill. Any and all costs associated with the spills are the responsibility of the vendor.
22	For "Wet Chemicals" payment shall be based on either printed meter ticket at time of unloading or on a printed meter ticket at the time of loading by the vendor.
24	Bidder has reviewed the historical use information provided by The Woodlands Township. Historical use is only meant to be informative and is not a guarantee of use during the contracted period.

Packet Development-Specifications

- Specifications-Pool Deck

Item #	Description of Requirements
1	Contractor will clean deck areas & pressure wash before installation.
2	Contractor will install barrier to prevent debris from entering the pool during the deck refurbishment process.
3	Contractor will treat all cracked areas by grinding the cracks and apply an epoxy crack treatment application. There is approximately 225 linear feet of cracks.
4	Contractor apply deck coating of 3/16ths of an inch thick over current aggregate deck and pavers. Deck coating is a colored concrete resurfacing material made of cement, silica sands, and acrylic bonding agents or equal product. The pool deck is approximately 10,500 sq.ft.
5	Remove and replace approximately 1,000 linear feet of expansion joints with Deck-o-seal or equal product and paint to match deck color.
6	Apply new slip resistant classic cool deck texture.
7	Apply color seal coats as selected by The Woodlands Township.

Packet Development-Specifications

- Specifications-Pool Concessions

16	Selected Concessionaire shall be responsible for cleanup of all park area within 200 feet from each concession outlet. Concessionaire shall be responsible for removing all such litter and shall be responsible for removing all refuse and waste generated by Concessionaire's operation. All such litter, refuse, and waste shall be removed from the area for proper disposal at Concessionaire's expense. The Woodlands Township shall charge for the costs of special cleanup (\$25 per staff hour + 15% administrative charge) should the Concessionaire fail to reasonably perform.
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19	Selected Concessionaire shall not vend or offer glass containers.
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18	Selected Concessionaire shall not place any signage in the park unless approved by the General Manager or his/her designee. No signage is permitted in the right of way.
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22	Prices of items and/or services sold or offered shall be visibly posted.
23	Selected Concessionaire shall not sell or distribute alcoholic beverages.

Packet Development

- What does a bidder need to know (supplemental information) to provide a quality bid and make a profit???

- Historical information
- Units consumed
- Rate of use
- Limitations on work
- Rate of growth
- General Facility Data-size/width/length
- Number of Gallons
- Filtration systems and Equipment
- Operating Data
- Patron Use Schedule of use-monthly/season/daily
- Revenue generated
- Expenses

Packet Development

- Supplemental Information-Pool Chemicals

2009 Historical Use- "Wet" Chemicals			
Facility	Address	Liquid Chlorine (gallons)	Muriatic Acid (gallons)
Alden Bridge	7725 Alden Bridge Dr.	4,585	300
	5200 Research Forest Dr.	5,575	480
Bear Branch			
Cranebrook	11800 Cranebrook Dr.	3,000	360
Creekwood	3383 S. Panther Creek Dr.	5,000	360
Falconwing	5610 Rush Haven Dr.	3,770	330
Forestgate	7505 S. Forestgate Dr.	2,765	300
Harpers Landing	2 Blair Ridge Dr.	2,005	300
Lakeside	5001 W. Alden Bridge Dr.	3,665	330
Ridgewood	4192 Interfaith Way	3,505	330
Rob Fleming Aquatic Center	6535 Creekside Forest Dr.	12,100	1,620
Sawmill	2200 Millpark Dr.	4,085	360
Shadowbend	4192 Lake Woodlands Dr.	4,130	360
Windvale	7600 Windvale Cir.	3,145	300
The Fountains at Waterway Square			720
Carlton Woods		210	120
TOTAL		57,540	6,750

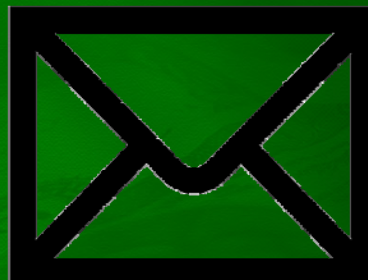
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- Supplemental Information-HVAC

The Woodlands Township HVAC Equipment				
Facility	Mfg	Quant	Equipment Type	Model
PARDES 8203 Millennium Forest Drive	Carrier	1	Condenser	38brC042-321
	Carrier	1	Condenser	38brC042-321
	Carrier	1	Condenser	38ck048-612
	Goodman	1	Condenser	CKI60-4I
	Trane	1	Condenser	2ttaa060a40000a
	Trane	1	Condenser	2ttaa060a40000a
	Trane	1	Condenser	2ttaa060a40000a
	Carrier	3	4-Ton AHU	NA
	Carrier	1	5 Ton AHU	NA
	Trane	2	5 Ton AHU	NA
	Trane	1	2.5 Ton AHU	NA
TWT Service Center 2201 Lake Woodlands	Trane	4	TRU A/C Pk. Units	TCD033
	Curtis	1	Air Compressor	
		1	Pneumatic System	
	Frederick	1	Mini-Split 2-Ton (Server Room)	
Waterway Square 31 Waterway Square Place	Legacy	2	Chiller	Pwc360d2-t4-z
	Trane	1	Air Handler	MCCB017ua0c0c0ub
		2	Condenser and Chiller Water Pumps	

Bid Implementation

- Sending out the RFP/Bid
 - Who Wants This Work?
 - PR Directory
 - State Association
 - Local Vendors
 - Plan Rooms
 - Other
 - Managing questions/comments
 - Addendums
 - Notice of Clarification



Bid Implementation



The Woodlands Township

The Woodlands, TX

Pool Chemical Bid

Addendum 1
October 25, 2010

Note: This Addendum shall be included as part of the Bid Form Documents. Items in This Addendum applies to any and all specifications whether referenced or not involving portions of work added, deleted, modified, or otherwise addressed in the Addendum. Acknowledge receipt of this Addendum in the space provided on the Bid Form and on the Bid Tabulation. Failure to do so may subject the Bidder to Disqualification.

General

1. This item is in reference to bidding for pool chemical contract dates to be changed from a three year contract from January 1, 2011 to December 31, 2013 to a one year contract from January 1, 2011 to December 31, 2011.
2. This item is in reference to updated pool chemical bid form:

2011 Pool Chemical Bid Form

Item	Description	Frequency	Unit	Delivery Location (s)	Bid Amount per Unit
Liquid Chlorine	Sodium Hypochlorite (10-12% available chlorine)	As Needed	Gallon	Various	
Muriatic Acid	Hydrochloric Acid (31.45%)	As Needed	Gallon	Various	
3 inch Chlorine Tablets	Three (3) inch Accu-Tab SI (scale inhibitor) calcium hypochlorite tablets	As Needed	Per 55 lb Bucket	Waterway Square	

Bid Implementation



The Woodlands Township

The Woodlands, TX

Sawmill Park Request for Proposal/Qualifications Notice of Clarification #1 December 13, 2010

Note: This Notice of Clarification shall be included as part of the Submittal. Items in this Notice applies to any and all specifications whether referenced or not involving portions of work added, deleted, modified, or otherwise addressed in the Notice.

1. Does the total project budget (\$500,000) include design fees and construction costs?
 - a. The project budget for the renovation of Sawmill Park is \$500,000 inclusive of design services, biddings service, construction administration, surveying, construction costs, and construction phase testing, if necessary. Consultant fees shall be inclusive of reimbursables such as travel, printing, etc.
2. Is there a program for the park renovation or is programming part of the scope of work?
 - a. Sawmill Park is a Village Park and has a prescribed program (pool, playground, picnic, athletic courts and fields, pavilion, parking and pathways) per The Woodlands Recreation Facilities Guidelines. The scope may include upgrading and/or enhancement of existing facilities and/or adding new amenities.
 - b. The park is 32 years old. Over the years routine improvements have occurred such as tennis court resurfacing, pool re-plastering, pool deck refurbishment, theme slide refurbishment, shade improvements, pathway repairs, and playground replacement. Improvements have been made on a per amenity basis; however an overall park improvement plan has not been addressed. This project is to look at the park as a whole and create a renovation plan that improves the overall park and its amenities.
 - c. Though the community input process will need to confirm, The Woodlands Township anticipates improvements will be needed to create an sense of arrival at the park, enhanced circulation within the park, pool and pavilion improvements, lighting upgrades, parking and forest clean-up.

Bid Evaluation

- Bids and Proposals have been received.....now what????
 - Who will review?
 - What is their experience?
 - Decision making considerations
 - Price, delivery, warranty, lifetime cost, quality
 - Experience, knowledge, project approach, familiarity of the system, references

Bid Evaluation

	Wet Chemicals		Dry Chemicals					
	Liquid Chlorine Per Gallon	Muriatic Acid Per Gallon	3 inch Chlorine Tablets Per 55lb Bucket	Sodium Bicarbonate 50 lb bag	Calcium Chloride 50 lb bag	Cyanuric Acid 100 lb bucket	Calcium Hypochlorite 100 lb bucket	Estimated Annual Total
CONTRACTOR								
Progressive Chemical	56,183.40	13,193.70	3,924.00	1,512.00	3,024.00	3,960.00	4,470.00	86,267.10
Clearwater	83,128.50	18,232.50	5,940.00	1,728.00	3,240.00	6,400.00	5,250.00	123,919.00
Pool Sure								

Where am I getting these total numbers from?

Bid Evaluation

I.	Firm Experience & Qualifications (Management Team, Team Org., Skill of Team)	Experience in the field of parks renovations and master plan (consultants & sub-consultants), and program that incorporate current parks and recreation trends.
		Ⓐ Development of creative conceptual designs of a park of similar: 3 = 10 or over; 4 = 7-9; 3 = 5-7; 2 = 3-6; 1 = less than 3
II.	Demonstrated Knowledge	Based on general knowledge and experience with similar projects of scope, size, similar nature and budget.
	Project Approach (Design Development, Public Input Process, Design and CDS)	Ⓑ Demonstrated success on public input process, design develop etc. for projects of this size and scope projects
		5 = More than 10 projects / accounts; 4 = 7-10 projects; 3 = 5-7; 2 = 3-6; 1 = <3
	Ability to Meet Schedule and Budget Containment	
IV	Methodologies	5 = 100% meet schedule; 4 = 75%; 3 = 50%; 2 = 25%; 1 = <25%; proven ability to design within a specified project budget; outline budget containment methodologies
V	Familiarity with The Woodlands Township	Based on knowledge & prior experience with The Woodlands Township (or its predecessor) and The Woodlands Park and Recreation System (previous and future)
VI	Other factors(knowledge of local factors, responsiveness)	Based on feedback received from Reference checks: 5= good recommendation, 4= average recommendation, no negative; 3= average recommendation, minor negative; 2= average recommendation, some negative; 1= poor recommendation
		Vendor has addressed all aspects of the RFP A-F in a professional manner. Time, energy and effort has been spent in developing the proposal and in addressing the park needs

Bid Evaluation

	NAME								
	SUB-CONSULTANT								
	SUB-CONSULTANT								
	SUB-CONSULTANT								
	RFP RECEIVED BY TOWNSHIP								
	RFP DELIVERY METHOD								
	SIGNED NOTICE OF CLARIFICATION								

Bid Evaluation

- What if bids are too far apart?
 - Do you have good specifications?
 - Do you have an apples to apples comparison?
 - What type of business is it- small vs large?
 - Is this their primary line of business?
 - Use a third party to analyze
 - Use industry standards to compare.



Bid Evaluation

- Do your homework: Check references & previous work completed
- Professionalism in the bid
- Low bid contractors will create additional work due to failure to provide “other services.”
- Analyze all aspects of the bid

Final Thoughts-Do's and Don'ts

- | | |
|--|---|
| <ul style="list-style-type: none">• Do<ul style="list-style-type: none">• Describe the performance and other relevant requirements• Describe requirements and timeline expectations• Quality people to evaluate bids/proposals• Allow time to review submittals | <ul style="list-style-type: none">• Don't<ul style="list-style-type: none">• Specify a “brand name”• Place unreasonable requirements on firms• Specify geographical preferences• Require excessive bonding• Take arbitrary action |
|--|---|

Thank you!!!!

For further questions or comments

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