“RFI … or Request for Barely Useful Information (RFBUI)?”

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“Why Ask a Question If They Won't Bother Answering?”

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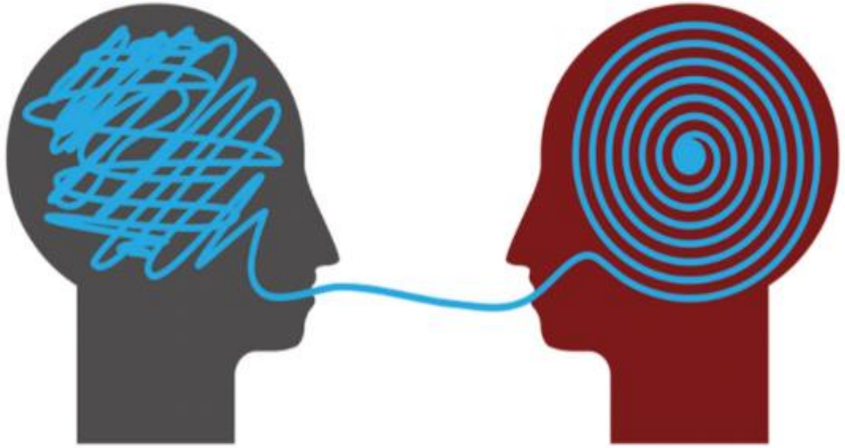

Bienvenue Welcome!

2024 CIPMM Regional Workshop

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Martin Chénier … Who's that?

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Agenda

Start on time	— Opening Remarks
A few minutes here	— Quick background
Take 5 minutes or so	— Key elements of the RFI
Maybe 15-20 minutes	— Case in point examples
Expect to wrap up 45 minutes later	— Closing Remarks

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Quick Poll

(Who's a supplier? Who's a client? Who's procurement?)

Supplier

Client

Procurement

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Who participated in an RFI recently* ?

(*For the purpose of this exercise, « recently » is defined as ... you know ... Recent ... Like « not 5 years ago », but if it was in the last year, you can raise your hand)

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Did the RFI live up to your expectations* ?

(*For the purpose of this exercise, « expectations » is defined as ... you know ... Results you expected. Did you have expectations ? Did the RFI meet those expectations ? There you go ... Raise your hand!)

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Remember all frustration is based on unmet expectations. If we did not expect anything we would not be frustrated.

John Lund

quotefancy

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The Insert most GOC dept name here! is enquiring whether or not the following expertise can be found from the list of pre-qualified ProServices suppliers listed under Stream Stream 9: Business consulting/change management: 9.7 Needs analysis, (Senior level):

- Specific expertise and knowledge required: The contractor should be well-versed in VR for learning, possess technical and organizational skills, and effectively manage remote work and collaboration. More specifically, the contractor shall have:
  - expertise, knowledge and access to Virtual reality (VR) technology, including have access to virtual reality hardware (e.g. Quest 3) and fully immersive platforms, to be shipped to and from pilot participants residence for testing purposes.
  - Proficiency in logistics for shipping and supporting VR headsets.
  - Strong training and facilitation skills to organize VR orientation and learning sessions, collaborate [redacted]structors, and develop relevant materials.
  - Effective communication and collaboration, particularly in English, are essential for ongoing interaction with the Technology Lab and participants.
  - Project management, including organizing kick-off and wrap-up meetings, and adhere to VR-related requirements and constraints.
  - Ability to design and implement end-of-pilot surveys, analyze feedback, and compile comprehensive post-pilot reports is crucial.
  - Knowledge of client support, participant recruitment, and coordination with facilitators is also expected.

See the attached Statement of Work for full project requirements.

- Estimated timeframe: The virtual reality (VR) training pilot completed, and the report submitted prior to March 31, 2024.

Those suppliers who meet the requested expertise and ability to deliver on the requirements outlined in the Statement of Work, please respond by return email by Friday December 1st, 2023, at 5pm.

Please note: responding to this enquiry does not guarantee to the suppliers an invitation for any future Request for Proposals (RFP) issued and/or subsequent contracts.

Best regards,

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[redacted] is enquiring whether or not the following expertise can be found from the list of pre-qualified ProServices suppliers listed under Stream: 9.7 Needs analysis and research consultant at Senior level:

Specific expertise and knowledge being requested:

- 5 + years expertise on
- Significant experience i … nts, of current capabilities and capacity building efforts
- Knowledge of the Oxfor
- Knowledge of the Pacifi

Estimated timeframe: from the

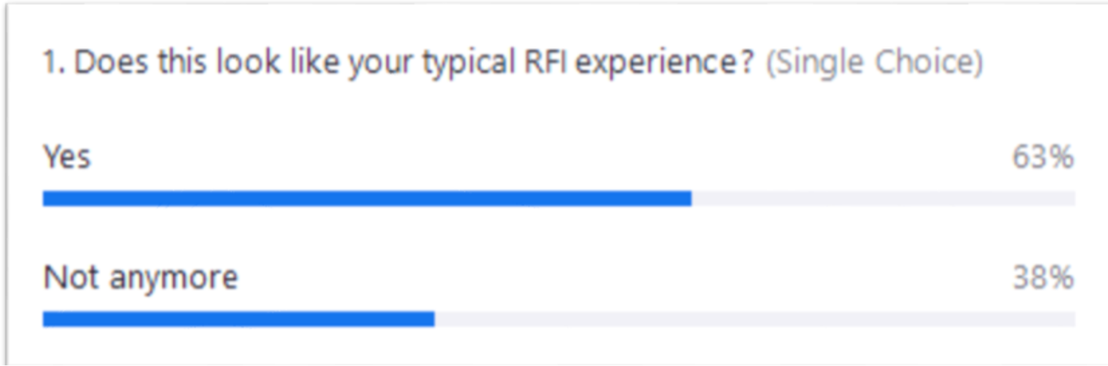
Those suppliers who have the a … CVs or a proposal is required at the moment

Please note: responding to this enquiry does not guarantee to the suppliers an invitation for any future Request for Proposals (RFP) issued and/or subsequent contracts.

Best regards

RFI vs RFBUI

(Barely Useful)



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COMMON MISTAKES – REQUEST FOR INFORMATION (RFI)

- Too wordy, too long, doesn’t get to the point
- Not enough elements to provoke supplier reactions (Ex: proposed budget, proposed criteria, proposed format)
- Too much effort to respond

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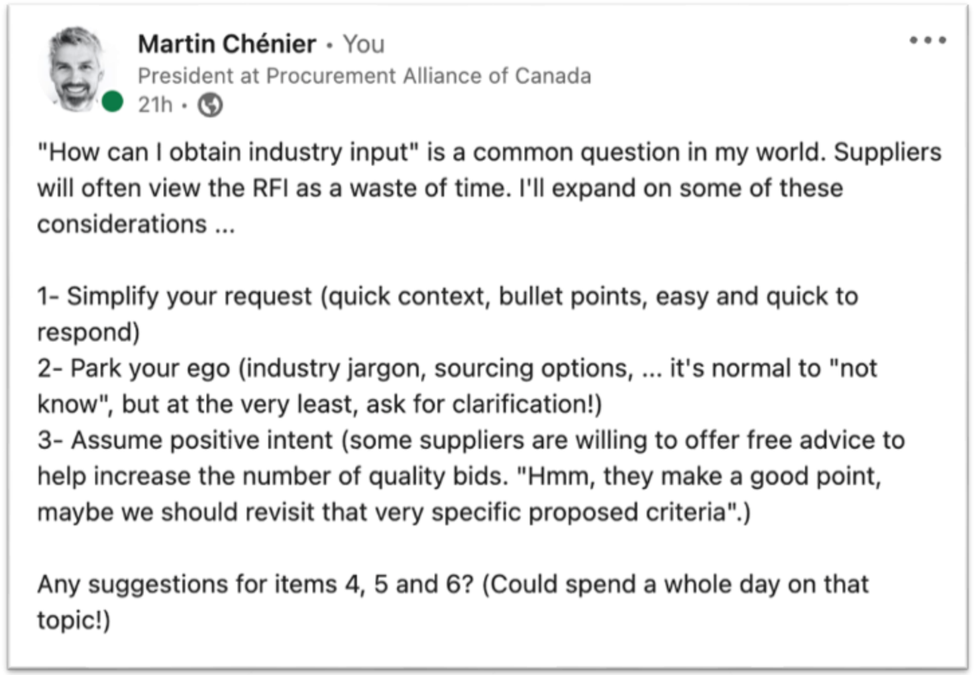

Martin Chénier • You
President at Procurement Alliance of Canada
21h •

"How can I obtain industry input" is a common question in my world. Suppliers will often view the RFI as a waste of time. I'll expand on some of these considerations ...

1- Simplify your request (quick context, bullet points, easy and quick to respond)
2- Park your ego (industry jargon, sourcing options, ... it's normal to "not know", but at the very least, ask for clarification!)
3- Assume positive intent (some suppliers are willing to offer free advice to help increase the number of quality bids. "Hmm, they make a good point, maybe we should revisit that very specific proposed criteria".)

Any suggestions for items 4, 5 and 6? (Could spend a whole day on that topic!)

Lewis S. Eisen, JD CIP (He/Him) • 1st
The leading professional authority on the use of respectful langua...
19h •••

here's my add: Respect the supplier's time. They are not being paid for the time spent with you until the contract is signed, so don't abuse that privilege.

Like · 1 | Reply · 3 Replies

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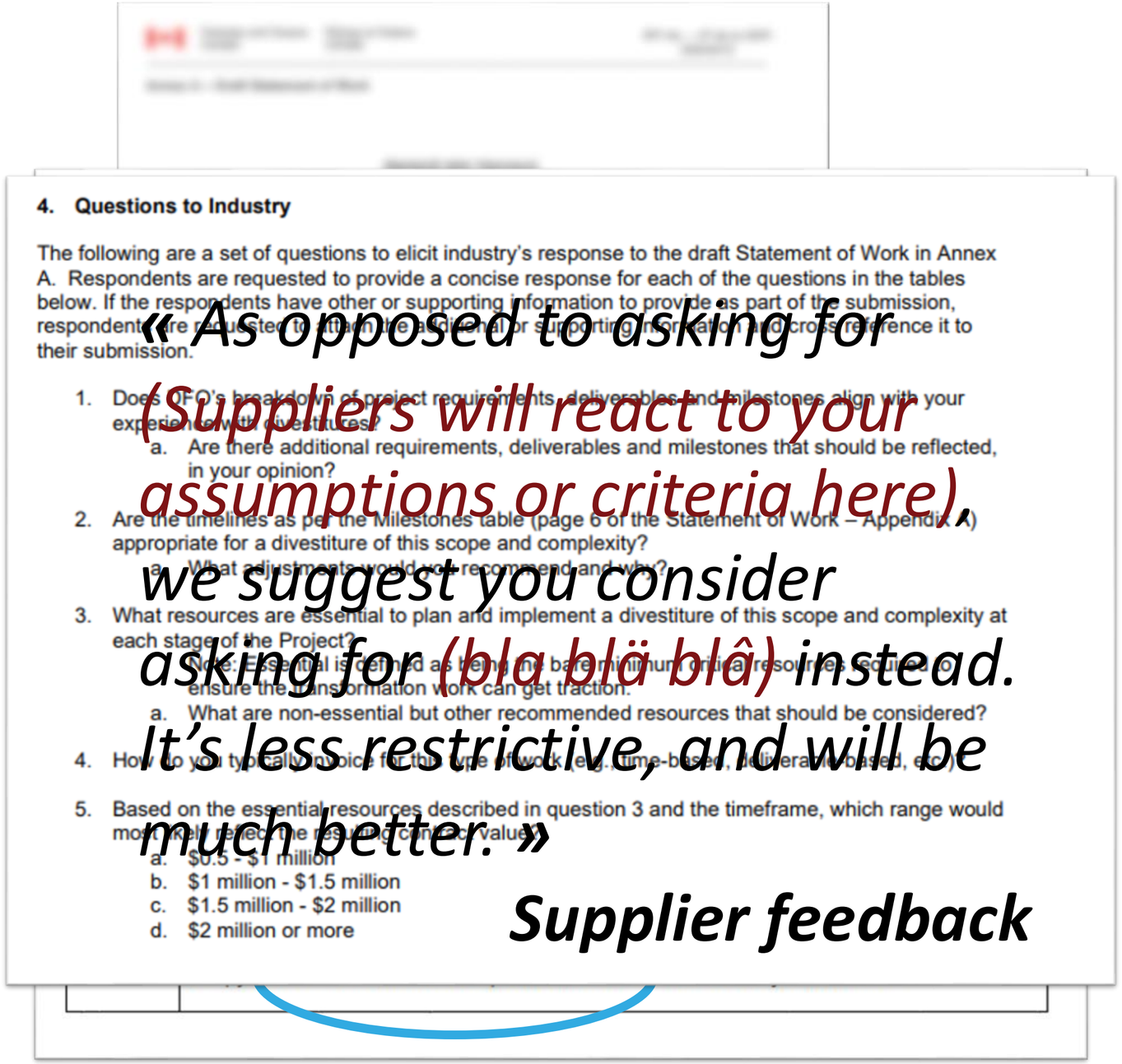
RECIPE FOR AN EFFECTIVE RFI EXPERIENCE ?

- Keep it concise … It's not an RFP
- Ask Questions … Share assumptions / React to assumptions
- Review, « translate », clarify



4. **Questions to Industry**

The following are a set of questions to elicit industry's response to the draft Statement of Work in Annex A. Respondents are requested to provide a concise response for each of the questions in the tables below. If the respondents have other or supporting information to provide as part of the submission, respondents are requested to attach the additional or supporting information and cross-reference it to their submission.

1. Does DFO's breakdown of project requirements, deliverables and milestones align with your experience with divestitures?
   a. Are there additional requirements, deliverables and milestones that should be reflected, in your opinion?
2. Are the timelines as per the Milestones table (page 6 of the Statement of Work – Appendix A) appropriate for a divestiture of this scope and complexity?
   a. What adjustments would you recommend and why?
3. What resources are essential to plan and implement a divestiture of this scope and complexity at each stage of the Project?
   Note: Essential is defined as being the bare minimum critical resources required to ensure the transformation work can get traction.
   a. What are non-essential but other recommended resources that should be considered?
4. How do you typically price for this type of work (e.g. time-based, deliverable-based, etc.)
5. Based on the essential resources described in question 3 and the timeframe, which range would most likely reflect the resulting contract value?
   a. $0.5 - $1 million
   b. $1 million - $1.5 million
   c. $1.5 million - $2 million
   d. $2 million or more

« As opposed to asking for (Suppliers will react to your assumptions or criteria here), we suggest you consider asking for (bla blä blâ) instead. It's less restrictive, and will be much better. »

Supplier feedback

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Suggestion for a revised format ?

(I thought you'd never ask!)

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Revised RFI template

Features …

- Questions on top
- Background info
- Offer key considerations and additional info
- Share budget
- Bidders' conference date if applicable
- Proposed criteria
- RFI due date

Hello dear supplier,

We noticed you were a qualified supplier on the … (If applicable … specify where you found their contact info. For example, TSPS Stream X, under Category Y).

We are working on an RFP and hoping you could provide input and considerations based on the background and requirement details found further below. To keep it relatively simple and fast, we ask if you can reply and provide answers to the following questions:

1. Would you / your company be able to assist us with this requirement? ___ Yes ___ No
2. Are you interested in this requirement? ___ Yes ___ No
3. Do you have comments / feedback in relation to our requirement and proposed evaluation criteria that will help us finalize our RFP and help us achieve our desired outcome? ___ Yes ___ No
4. Any additional considerations? (Please expand using the comments section below)

Quick Background:
(Insert a brief paragraph describing the background info … no more than 100 words if possible)

Additional information and key considerations include:

- Use a bullet point approach and share info such as expected duration
- Consider offering estimated level of effort
- Sample tasks and key deliverables
- Technology being used, or considered
- Work relationship between your staff and their resources
- Security requirements or limitations
- … other bits and pieces that capture client expectations that need to be "validated" by industry

Approximate budget for this project: Up to $X. **(Can help target your audience)

Proposed procurement process:

A. We intend to invite all qualified suppliers under (whatever contracting vehicle, stream, category … if applicable). We are also planning **a mandatory bidders' conference on Friday Month 5th 202X** and will limit its list of RFP recipients based on those who attended the conference (IF APPLICABLE).
B. **As a starting point, we thought it would make sense to consider the following evaluation criteria:**
    1. Explain your main evaluation criteria (Ex: Corporate criteria or Technical criteria)
    2. You can list your main 2-3 criteria and have industry react to those

Comments / Considerations:

_____

_____

_____

Please provide your response by 5pm (EST) on (Date).

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Improve the format. Got it.
Final words ?

(So many questions. Is this almost done ?)

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Requesting is the easy part!

- Review, « translate », clarify
- Finalize RFP and Evaluation Criteria
- Consider industry feedback during the Q&A ... and adjust accordingly!

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Comments / Feedback

Given the requirements and priority, we would like to advise that a strong technical/price evaluation weighting should be considered (suggested 80/20) to ensure quality bids are received. We would also strongly recommend that demonstrated experience not only include the resources but corporate experience for similar projects, and would like to suggest that methodologies and plans be included in the RFP criteria. Finally, we would like to suggest that reference checks on client satisfaction and a possible interview or presentation phase be included as part of the evaluation process.

We have reviewed the requirements and key considerations, and have concluded that this is area where [redacted] has relevant, contextual experience idelivering successful outcomes to our Government of Canada clients.

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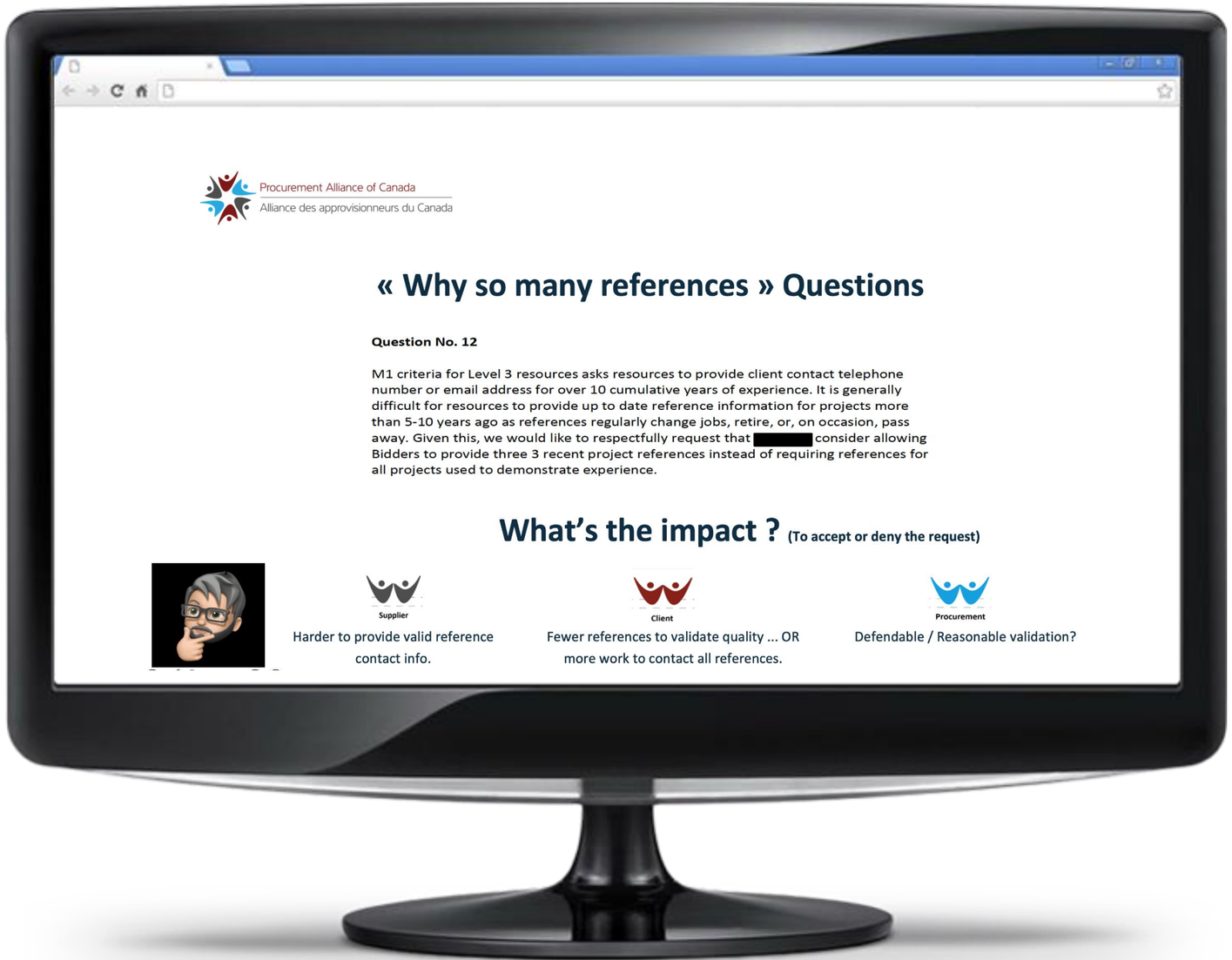

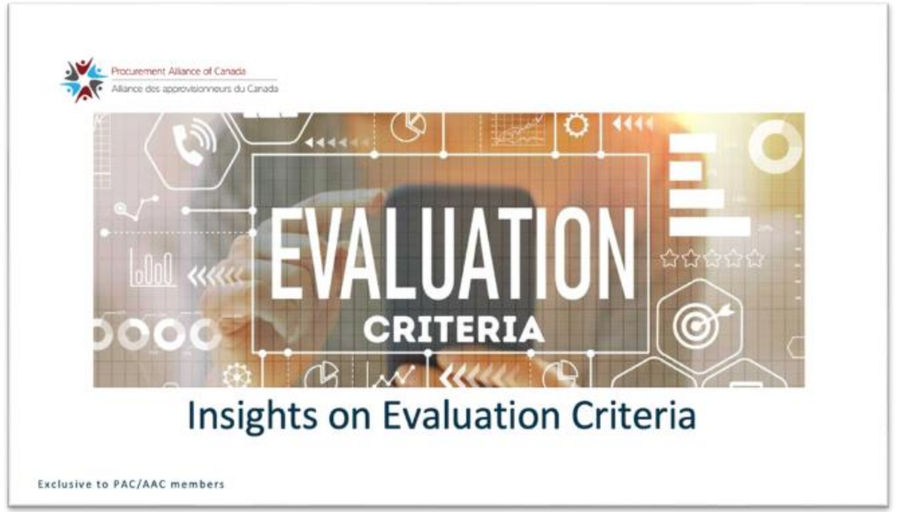

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If your RFI process is not leading to useful information … change your process

#You’veGotThis

(You’ve got this, Right?)

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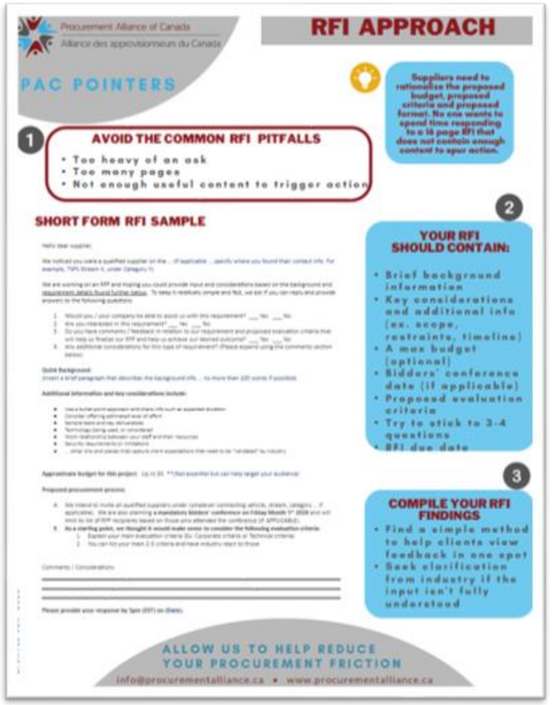
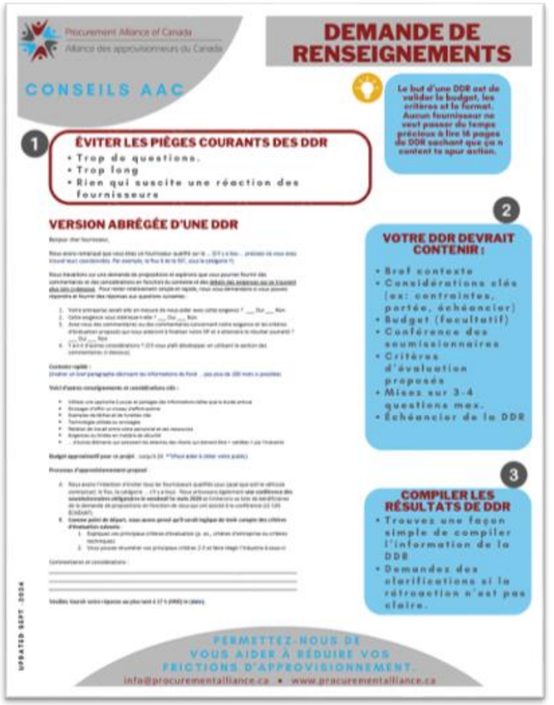
Swing by our booth … Or scan





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Questions

(Merci Bonsoir)

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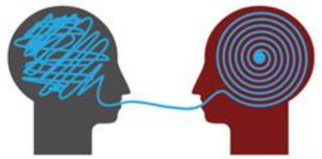
#CIPMMRW2024Rocks!