



Management Consulting

- Strategic Planning
- RFP Preparation & Evaluation
- Emergency / Pandemic Planning
- Organizational Reviews
- Business Process Improvements
- Benchmarking Surveys
- FM Audit



FM Technology

- FM Strategic Planning
- IWMS Analysis & Planning (Integrated Workplace Mgmt. Systems)
- Visioning & Business Plans
- System and Process Evaluations
- Product Evaluations & Advice
- Product Selection Expertise
- System Implementations

FOR

- EAM systems (Enterprise Asset Management)
- CAFM systems (Computer Aided Facilities Mgmt.)
- CMMS systems (Computerized Maint. Mgmt.)
- Service Request systems
- Work Order Systems
- Capital Renewal Planning systems
- Fleet Management systems
- Other Specialized FM Applications



Requests for Proposals (RFP)

Preparation, Evaluation and Selection Process

The expertise that you need to get the best results

- Strengthen your procedures for competitive bidding and obtain the best value for the purchase of products and/or services.
- FmT Consultants has developed an effective, clear, concise and objective process for managing all phases of competitive bidding.
- This process is fully integrated so that the content and format of the RFP document facilitates the review and evaluation of the proposals and selection of the preferred bidder.
- Faster, fair and transparent process, better results, excellent audit trail

◆ OBJECTIVES

- clearly define the current and/or future organizational needs
- obtain competitive proposals from qualified bidders
- complete an effective evaluation of the proposals to select the bidder that provides the best value
- ensure that the RFP and proposal provide a suitable basis for the preparation of the contract with the preferred bidder
- provide records documenting the entire process for on-going reference and possible future audit

◆ END RESULTS

- receive higher quality proposals due to the clear and concise RFP
- more effective and objective evaluations of the proposals
- more informed decision making for the selection of the preferred bidder
- minimize the time required by the Evaluation Team members
- the entire process is completed on a fair and transparent basis
- the records documentation upon completion provides all information required for possible future audits

◆ FmT Consultants Ltd. is a management consulting firm specializing in facility management and technology.

- Our focus is to help our Clients manage their facilities, infrastructure and capital assets on a sustainable basis.
- Our services are results driven and have been provided to facility managers, building owners and senior managers since 1993.

Get It RIGHT
...Get the right advice

Requests for Proposals (RFP) Preparation, Evaluation and Selection Process

The effective and objective process for managing all phases of competitive bidding.

FmT Consultants can help you manage the entire RFP process on behalf of the organization or provide services for selected stages only.

◆ DEFINITION

- Evaluation Team is formed / roles and responsibilities are defined / needs of the users and organization are defined
- purchasing standards of the organization are determined
- “Basic Requirements” are clearly defined so that firms can easily determine if they are qualified to submit a bid
- required content and format of the proposals is specified to facilitate review by the Evaluation Team
- questions requiring specific responses from the Bidders are designed to facilitate comparisons and evaluations
- all required prices and related costs are clearly defined and must be provided in a specific format
- major and minor evaluation factors are cross-referenced to specific questions in the RFP

No.	RFP reference	A	B	C
1.9	SW maintenance and support agreement			
1)	Agreement available	Yes	Yes	Yes
2)	Annual cost	20% of MRP (6)	17% of MRP	18% of cost
3)	Agreement commences	Upon s/w installation	upon s/w installation	on shipment
4)	Services included	Tel support & updates	Tel support	tel support & updates
5)	Services by head office	All	All	None
	Services by local office	None	None	All
6)	Max# FMD staff who can use support	No limit	3	no limit
7)	Software upgrades included	Yes	Yes	Yes
	If not, cost of next upgrade	-	-	n/a
	If not, date of next upgrade	-	-	n/a
8)	Can meet FMD telecomm service time req'ts	No (7)	No	Yes
	Normal times of telecomm operation	8 hrs x 5 days	8 to 17.00 hrs EST	8 to 20.00 hrs EST
9)	Discount for multiple years	10%	Yes	Yes
10)	Can adjust scope and cost	Yes	Yes	Yes

◆ EVALUATION

- proposals are reviewed for compliance with the Basic Requirements. Unacceptable proposals are rejected
- proposals are summarized in a spreadsheet that provides an “across the board” summary of all responses to each specific question
- the proposals, spreadsheet summary and evaluation spreadsheet are forwarded to the Evaluation Team
- FmT facilitates a meeting of the Evaluation Team to summarize the individual evaluations
- a preferred bidder or a “short list” of bidders is selected
- FmT facilitates the interviews and the evaluations

Description of Factor	RFP Ref.	Max Pts	Rating Guidelines
CORPORATE CAPABILITIES			
Corporate ability to handle this project	H.1.1 to .7	1.00	0.5 is acceptable
Stability of CMMS product	H.2.1 + 2	1.00	0.75 = 10 years
Resources to support CMMS product	H.2.3 to .5	1.00	0.5 is acceptable
CMMS product share of marketplace	H.2.6 + 7	0.50	0 for no response
Availability of CMMS user group	H.2.8 + 9	0.50	0.5 = yes; 0 = no
Suitability of local support	H.3.1 to .4	1.00	1.0 for office in Western Canada
		5.00	
PRODUCT CAPABILITIES			
Meets all mandatory requirements	I.3	2.00	- 0.50 per each deviation
Has all desired optional modules	I.4.1	1.50	- 0.25 per each no module
Has all additional optional modules	I.4.2	0.50	0.25 per module
Has other optional modules of interest	I.4.3	0.25	0.25 for 1 or more

◆ SELECTION

- overall evaluations of the proposals and interviews are summarized for each short listed Bidder
- FmT facilitates the selection of the preferred Bidder
- an agreement is negotiated with the preferred bidder

◆ RECORDS

- a Project Document Record in an electronic and paper format is provided to the Client to summarize the entire RFP and selection process for records and future audit purposes