

BOOK REVIEW

Developing and Managing Requests for Proposals in the Public Sector (3rd ed.) by Jack Pitzer and Khi V. Thai, National Institute of Governmental Purchasing, 2009, ISBN 1-932315-20-9, hardbound, 244 pages.

Developing and Managing Requests for Proposals in the Public Sector by Jack Pitzer, and Khi V. Thai is one of the books in the National Institute of Governmental Purchasing's (NIGP) LEAP Program. This text provides readers with a step-by-step guide to improving the way that Requests for Proposals (RFP) are developed and managed. Pitzer and Thai's work should be seen as an invaluable reference that assists with setting new standards for professionalism, completeness, and quality as they relate to the RFP process.

Chapter 1 begins with an overview of the RFP process. A historical account of when and how RFPs may have first been used is presented. Each stage common to most RFPs is then discussed offering the reader the type of general understanding necessary to move forward with improving the way in which each stage is managed. The Chapter also discusses a set of factors that determine procurement method selection and more specifically a basis for choosing an RFP over a Request for Bid (RFB). Pitzer and Thai suggest that RFPs are particularly useful when evaluating proposals that are based on more than just price and when more flexibility is needed to evaluate and select suppliers.

Chapter 2 focuses on the earliest stages of the RFP development process; needs identification and the preparation of an acquisition plan. An illustration of a typical RFP process is presented along with a discussion of a more complicated process involving a major information technology acquisition. Readers can expect to improve

their understanding of what needs to be done as they plan for the RFP process including how to manage issues relating to specific objectives to be met, creating a detailed description of the work to be carried out by vendors, the extent of the activities to be performed, qualifying characteristics required of suppliers, budget range, work methodology, time frames and milestones, specific deliverables, and selection criteria.

Chapter 3 moves the reader from the initial stages of planning for the RFP process to the task of developing the RFP document. Pitzer and Thai outline the major sections that should be included in the RFP document and then offers a series of suggestions and practical insights aimed at producing a document that ensures that potential offerors have a clear understanding of the detailed specifications for the need, including terms and conditions, instructions for submissions, special clauses, and timelines for delivery. An especially useful part of this chapter is the discussion that relates to improving the style of writing that is used and how to choose words that describe and discuss what is needed along with some specific suggestions that readers can use to substantially improve the quality of the RFP document.

Chapters 4, 5, and 6 relate to the proposal-handling process, evaluation and selection of suppliers, and an in depth discussion of different evaluation methodologies that can be used when evaluating prospective suppliers. Particularly valuable are the series of scenarios presented by Pitzer and Thai that discuss some of the possible variations in handling proposals. Included in Chapters 5 and 6 is a detailed discussion of evaluation methodologies that can be used to improve the way that suppliers are chosen and help evaluators avoid some of the common problems associated with evaluation. Roles of evaluators, codes of conduct, and ethical considerations are also discussed.

Once a supplier is chosen, the importance of contract negotiation arises. Chapter 7 and 8 discusses a series of better practices that can be used to guide the contract negotiation, development, and writing process. The negotiating strategies presented are not only an interesting read but are more importantly very effective tools when applied as instructed and can help those involved in negotiating deal with complex and sensitive issues that often arise. Included in Chapter 8 are a series of suggestions aimed at improving the quality

of the contract ultimately written. Varying types of contracts are presented, special issues relating to contract law and commercial codes are discussed, and similar to the discussion about writing style that took place in Chapter 3, Chapter 8 also presents a number of 'good writing rules to remember' as one sets out to write the final contract document.

The final chapter in Pitzer and Thai's work focuses the completion of the RFP process. The author discuss the steps involved in confirming the successful bidder, releasing results and notifying bidders, dealing with complaints, and managing any problems that may arise as the Notice to Proceed is issued and the contract administration process is set into motion.

Pitzer and Thai seem acutely aware of the continuous pressure that public purchaser's face to improve the way that they spend public funds. Unfortunately, these purchasers also face a number of obstacles that impede their ability to make effective purchase decisions. Continual scrutiny of activities through audit and in-house reviews, intensive reviews by the media for any suggestion of mismanagement or impropriety, and a myriad of required policies and procedures that characterize government decision-making can cause public purchasers to be much more focused on the public's perception that they are following the policies and procedures in place rather than value for money spent.

Pitzer and Thai's book, *Developing and Managing Request for Proposals in the Public Sector*, offers a solution to this dilemma. The authors present a step-by-step guide that is both comprehensive and flexible. This guide helps to ensure that the RFP process is developed and managed in such a way that policies and procedures that are generally accepted as better practice are followed, and that value for money spent is also being achieved. In this way, Pitzer and Thai help to raise the quality standards associated with the RFP document and methods utilized so that all stakeholders are ultimately better served.

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