

Exercise 2: Preparing the RFP and Assembling the Acquisition Team

Student Instructions for Exercise 2:

In Exercise 1, you chose the facilities for which US PHA is going to request proposals. In this exercise, you are to act as a decision-maker for US PHA, and review all of the other elements of the RFP to make sure that you are ready to issue it. You will want to be sure that you have everything in the RFP that's necessary to guide ESCOs to give you all the information that you will need in order to select a contractor. You want the ESCOs to understand clearly what you want from this performance contract (PC), and what will be contractually required of them.

A second part of this exercise is to be certain (as you will be when you do an PC for your own housing authority) that you include on the PC team every individual or office that will be necessary, in order for your PHA to follow through on the RFP and to successfully implement a performance contract.

List 1: RFP provisions

Many Housing Authorities will base their RFPs on the model prepared for HUD by NCAT, or a variant of it. Take 10 minutes to review the NCAT model RFP (in the appendix of your course workbook) and see if there are any requirements, provisions or information that you would add to this model. Are there any things that you would drop? Your suggestions can be based on the previous presentations, materials in your workbook, suggestions from your own experience, or things that you know that your own PHA would require or want in an RFP.

List 2: Performance Contract Team Members

Please list any individuals, by their title or their primary function – whether inside or outside your PHA – that would be necessary for you to include on your team. These will be all the people you will need in order to prepare and issue this RFP, select and negotiate with an ESCO, execute a contract, and successfully implement a performance contract retrofit of your facilities. Indicate what would be their responsibility on the team. Your own knowledge of your PHA's procurement procedures, as well as your review of the NCAT model RFP, will suggest to you who you will need and what you will need them to do.

Develop these lists through discussion in your groups, for about 15 minutes. You don't need to describe the items in any detail. Just list them on the attached form, and be prepared to discuss why you made each choice. Be sure to select one person who will report your group's results, when the class as a whole and the instructor discuss this exercise.

Exercise 2 Worksheet

List 1: **What provisions would you include in your RFP?**
(in addition to those in the NCAT model document)

1. _____
2. _____
3. _____
4. _____

What items would you not include?

1. _____
2. _____
3. _____
4. _____

List 2: **Whom would you include on your acquisition team?**

Team Member

Responsibility

- | | |
|-----------|-------|
| 1. _____ | _____ |
| 2. _____ | _____ |
| 3. _____ | _____ |
| 4. _____ | _____ |
| 5. _____ | _____ |
| 6. _____ | _____ |
| 7. _____ | _____ |
| 8. _____ | _____ |
| 9. _____ | _____ |
| 10. _____ | _____ |
| 11. _____ | _____ |