The EdgeMarket RFP Methodology

Introduction

Edge continues to invest in extending and enhancing its ability to competitively and timely procure the goods and services that our members require.

The EdgeMarket Pricing Cooperative provides the legal vehicle for Edge to do this, and the **EdgeMarket RFP Methodology** provides the capability, capacity, and flexibility to do this well.

This article explains the fundamentals of the EdgeMarket approach to RFP-driven procurements.

One Platform, Two Methods

The **EdgeMarket RFP Methodology** is built on top of the DecisionDirector® platform provided by Advantiv Solutions. DecisionDirector enables Edge to increase the scope, speed and volume of its EdgeMarket procurement projects and ensure the quality of their outcomes by providing:

- Configurable stakeholder engagement facilities for planning activities that take place prior to an RFP event, and for structured vendor evaluation and due diligence activities after the bids arrive
- Powerful RFP response collection and analysis capabilities
- Flexible and reusable documents to support planning, evaluation, and procurement activities

Every EdgeMarket RFP will take place in DecisionDirector. The planning and due diligence approach will follow one of two methods, depending upon whether or not the service or solution being procured requires active stakeholder engagement in the process.

Method 1: Edge-Driven, Member-Advised, Streamlined Procurement

Focus: Solutions for which Edge has domain expertise, requiring only **high-level review and advisory input** from members.

There are many solutions that lend themselves to relatively straightforward determination of requirements and analysis of competing providers. These solutions may serve broad roles (think phone systems) or perform very specific functions (think end point security), but tend to otherwise be fairly transparent to the way most people do their work (think employees) or consume member's products and services (think students and citizens).

Other examples include networking, storage, communication, office suite and productivity products and much more, as well as a variety of professional and technical services.

For these types of everyday or background solutions, Edge will seek basic input and perspective from interested, experienced members while relying upon in-house expertise to create, issue and manage the RFP event, and conduct subsequent due diligence and determine the resulting award(s).

Method 1: Example Scenario - Emergency Notification System

Edge determines that a number of members are interested in acquiring or replacing their Emergency

Notification System (ENS). The EdgeMarket team reviews the possibility of conducting the procurement with the Edge management team for a go/wait/no-go determination.

If approved, the EdgeMarket team will proceed with the following general process:

1. Determine which members are interested in the procurement of a new ENS.
2. Invite each interested member to provide a knowledgeable individual to serve on an informal ENS procurement advisory team that will be created to provide initial guidance and general requirements for an ENS and any related services. Participation on the advisory team is strictly voluntary.
3. Confer with the ENS advisory team to confirm that the procurement does not require significant stakeholder engagement. If stakeholder engagement is required, then the project will transition to Method 2, Stakeholder-Engaged, Edge-Facilitated, Consultative Procurement (explained below).
4. Conduct a preliminary market survey to determine the current, relevant providers of ENS solutions, with an emphasis on those with a good track record of serving education and government.
5. Solicit from members any recent successful RFPs for an ENS, and concurrently scan the market for additional examples and resources.
6. Combine and refine the most useful of the gathered requirements and questions and likely vendor list, and share the first draft result with the member advisory team.
7. Create the RFP documents and the RFP event in DecisionDirector, define the due diligence and decision-making process, and share the final drafts with the ENS advisory team. incorporate feedback as appropriate.
8. Conduct the RFP event in accordance with statutory requirements and general best practices.
9. Conduct due diligence steps, inviting the ENS advisory team to participate and/or review. (Individuals involved in vendor evaluations may be required to sign a non-disclosure agreement and a conflict of interest statement.)

Method 2: Stakeholder-Engaged, Edge-Facilitated, Consultative Procurement

Focus: Solutions for which members desire **extensive stakeholder engagement**, facilitated and managed by Edge.

There are certain solutions which have a significant impact on the way people work, and for which any change must take into account the needs and perspectives of those stakeholders. Enterprise software applications are a classic example, including the Student Information, Financial Management, Human Capital Management and Customer Relationship Management systems, and many others.

For these types of solutions, success is not defined by finding the best price or terms. Success requires clarity of objectives, alignment of stakeholders, confidence in and transparency of process, and full buy-in to the initiative, the effort, and the outcomes. In short, these procurements are really projects in which member success is the result of effective, facilitated stakeholder engagement and collaborative decision-making.

For the procurement of these types of solutions, Edge has negotiated with Advantiv to engage interested members in valuable collaborative planning and due diligence activities with their stakeholders, and to

provide advanced levels of procurement project support at substantially reduced prices for participating members.

Method 2: Example Scenario - Student Information System for K-12

Edge determines that a number of K-12 members are interested in acquiring a new Student Information System (SIS). The EdgeMarket team reviews the possibility of conducting the procurement with the Edge management team for a go/wait/no-go determination.

If approved, the EdgeMarket team will follow the general process described in the Method 1 scenario above, with the following **additions**:

- Confer with the interested members to identify the affected student system stakeholder groups.
- Discuss strategies and options for engaging those stakeholders in the **procurement planning activities.** Such activities would be facilitated by the EdgeMarket using DecisionDirector, and typically include the following:
    - Collaboratively document the case for change
    - Collaboratively determine and prioritize anticipated challenges and intended outcomes
    - Collaboratively review and refine requirements
- Discuss strategies and options for engaging those stakeholders in the **proposal evaluation activities**. Such activities would be facilitated by the EdgeMarket/Advantiv team using DecisionDirector, and typically include the following:
    - Structured evaluation of vendor proposals
    - Structured evaluation of vendor presentations, including product demonstrations
    - Structured evaluations of reference checks, site visits, and vendor executive sessions

For More Information

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