



Bid BOMA: Building Relationships to Last

BOMA Oakland/East Bay

**BOMA OEB Luncheon
February 9, 2023**

Bid BOMA

Key Nuggets

BOMA Oakland/East Bay held an interactive roundtable luncheon with over 85 members. The members participated in peer-to-peer discussions on bidding and BOMA relationships. Mixed tables of Principal and Associate members shared tips, observations, goals and objectives for bidding services from opposite perspectives.

Discussion Topics:

1. **BIDDING:** How do you decide who to bid to? How did you decide to respond to a bid? What resources do you use? What peers do you go to? Do you use the BOMA OEB online directory?
2. **DEVELOP RFP:** What are the essential pieces? What's typically missing (associate perspective)? Ideal timing -
- PM and vendor perspective -- from bid response, bid walk, awarding, how much detail is too much?
3. **REVIEW & COMPARE BIDS** – What process do you use? How do you ask for clarifications? Are best and final requests fair?
4. **AWARD CONTRACT** -- How do you decide? Notifications to winning bid, non-winning bids, questions, concerns, if not incumbent, providing feedback to non-winning bidders, etc.
5. **CONTRACT ADMINISTRATION** -- How do you ensure the relationship stays strong? What do you do if issues arise?

The following pages are the notes and key ideas from the peer-to-peer discussions.

Discussion Topics:

BIDDING: How do you decide who to bid to? How did you decide to respond to a bid? What resources do you use? What peers do you go to? Do you use the BOMA OEB online directory?

- 3x bidders, chosen by referral and location
- “Keep It Simple, Stupid” model with a strong scope and keeping Apples to Apples
- At times not focused on high or low, but who the company is – prior experience with them, references and other factors
- Choosing who to bid to: the online directory resource is great, relationships across other BOMA locals/International, company preferred vendors
- Referrals from current vendors
- RFP platforms can be helpful at times, but not as useful as they seem
- Accountability
- Support vendors – if new, support within the company

DEVELOP RFP: What are the essential pieces? What's typically missing (associate perspective)? Ideal timing -- PM and vendor perspective -- from bid response, bid walk, awarding, how much detail is too much?

- Clear and detailed RFP key components – budget, strong scope, challenges, relationships, timing (e.g., Saturday only) and flexibility
- 30 days to respond
- More is always better, give as much info as possible
- Single bidder situation can be more cooperative on RFP vs. multi-bidder
- Include sample contract

REVIEW & COMPARE BIDS – What process do you use? How do you ask for clarifications? Are best and final requests fair?

- Are they a BOMA member?
- What is their DEI culture?
- Check references with other colleagues
- Transparency on process and decision-making process
- Level fairly, ask questions
- History with vendor and their quality of work is often more important than price
- Best and finals can be done, but should be done with care to all bidders
- Accuracy, asking for clarification and details to prevent future change orders
- Use spreadsheet to analyze proposals

Discussion Topics (Continued):

AWARD CONTRACT -- How do you decide? Notifications to winning bid, non-winning bids, questions, concerns, if not incumbent, providing feedback to non-winning bidders, etc.

- Award via email, offer to meet with team with feedback on pricing and areas for improvement
- Losing bidder doesn't need to know who won bid
- Provide feedback to non-winners to improve bidding for future
- Build relationships through process

CONTRACT ADMINISTRATION -- How do you ensure the relationship stays strong? What do you do if issues arise?

- Communication & Transparency – single point of contact, reputational responsibility, offer suggestions to rectify any issues that come up, overcommunicate
- No change orders, don't want to be nickel and dimed
- Set expectations and be clear from the beginning
- Monthly and quarterly walks
- Provide a good balance between positive feedback and constructive criticism