



# TACKLING PROCUREMENT CHALLENGES

Building effective data-driven tools to help jobseekers make better career decisions in today's economy can be a complex process and procuring key services to support those tools can be problematic. Below are five common procurement challenges and strategies for addressing them based on the experience of D4AD grantee partners.

<b>Challenge 1: Delays</b> Procurement processes can take a long time and can significantly delay overall progress.	<b>Strategies</b> <ul style="list-style-type: none"><li>• Identify and move forward on aspects of the project you can work on during procurement to minimize the impact of potential delays.</li><li>• Break down the project into smaller pieces to address costs thresholds that can complicate the procurement process. Modular contracting—breaking up large, complex projects into multiple tightly scoped procurements in successive, interoperable increments—can reduce the likelihood of delays, increase flexibility, minimize risk, and build in more frequent evaluation.</li><li>• If your project does not align well with current state, county, or municipal procurement processes, consider the possibility of procuring through a partner organization or forming a 501(c)(3) organization.</li></ul>
<b>Challenge 2: RFPs</b> Request for Proposal (RFP) templates do not always align well with project needs.	<b>Strategies</b> <ul style="list-style-type: none"><li>• Encourage regular updates of RFP templates to ensure that they allow for clear and succinct descriptions of needed services and support.</li><li>• Engage the contracting officer early in the process to develop solutions to bridge potential gaps between project needs and procurement requirements.</li><li>• Adapt the RFP template to your situation and remove non-essential template language and unreasonable requirements, such as excessive insurance limits.</li></ul>
<b>Challenge 3: Existing Vendors</b> Working with a vendor currently under contract may turn out to be as, or more, challenging than posting an RFP for a new vendor.	<b>Strategies</b> <ul style="list-style-type: none"><li>• Avoid making assumptions about how quickly and appropriately a vendor can adapt current products and services to suit your needs.</li><li>• Be prepared to change your course of action.</li></ul>
<b>Challenge 4: Slow Responses</b> Unresponsive vendors can significantly lengthen the project timeline.	<b>Strategies</b> <ul style="list-style-type: none"><li>• Set clear expectations about communication for your team and the vendor team. This includes scheduling regular check-ins.</li><li>• Set metrics and deadlines to help identify if and when your procurement strategy needs to pivot.</li></ul>
<b>Challenge 5: Defining Needs</b> Procuring a vendor to help with defining your needs can be especially difficult.	<b>Strategies:</b> <ul style="list-style-type: none"><li>• Be realistic about what services you can expect vendors to provide, especially given time and budgetary constraints.</li><li>• Focus on the 'why' instead of the 'how' to encourage vendors to use their own expertise and insights to develop their best approach to achieve the desired outcomes.</li><li>• Consider growing your internal capacity in advance of the project to better prepare for engaging external vendors.</li><li>• To increase the clarity of the RFP, ask someone who is unfamiliar with the project to review the RFP draft and identify areas that are confusing or need clarification</li></ul>

Creating a timeline to guide the process and producing an effective RFP can lead to a more efficient and successful procurement process.

## Sample Timeline

1. Discovery (one to two months)
2. Planning and Documentation (one to six weeks)
3. Vendor Research (one to three weeks)
4. RFP Development and Writing (one to three weeks)
5. RFP Distribution to Select Vendors (one to two weeks)
6. Time for Vendors to Return Proposals (two to four weeks)
7. Proposal Evaluation (one to four weeks)
8. Vendor Selection (one day to a week)
9. Contract Development (two to four weeks)

## Suggestions for Writing the RFP

1. Be clear and succinct.
2. Avoid jargon.
3. Clearly describe the current situation and why you are seeking a solution.
4. Avoid being overly prescriptive in specifying the solution to leave room for slight scope adjustments and encourage offerors to suggest innovations.
5. Describe how you will measure the project's success.
6. Provide proposal guidelines explaining to vendors what you are looking for in their response.
7. Provide a timeline for the procurement process.
8. Include a timeline for project completion.

*The **Data for the American Dream (D4AD)** initiative aims to support innovative efforts to expand access to education and career data to help students and jobseekers make better career decisions in a changing economy through data-driven information, and especially to help low-income, lower-skilled, underemployed, and unemployed Americans access better jobs and education opportunities.*