ATTACHMENT E – CLARIFICATION PHASE GUIDE

1. OVERVIEW
   1. The Clarification Phase is not a negotiation phase. Bidders will not be permitted to modify their cost/fee/financial rates, project durations, or project team unless Owner requests changes. The Clarification Phase is started by the notification of the Prioritized 1st Best Value Supplier(s) and ended by the final presentation to Owner after all issues have been addressed. If Owner is not satisfied during the Clarification Phase, or upon completion of the Clarification kick-off and Clarification Summary Meetings, Owner may consider another Offer for potential award (this Bidder would also have to participate in a Clarification Phase). If Owner is satisfied with the potential best-value Offer, Owner may proceed toward awarding a contract.
   2. The Clarification Phase is carried out prior to the signing of the contract. Owner’s objective is to have the products/services maximized without any supplier price increases, and with high customer satisfaction. At the end of the contract period, Owner will evaluate the performance of the supplier based on these factors, so it is very important that the Bidder pre-plans the project with a Risk Management Plan (RMP) intended to mitigate any risks, including but not limited to those identified in the Risk Assessment (RA) – Attachment D (2).
   3. It is the Bidder’s responsibility to ensure it understands the scope of their product/service offering and to clearly identify what it is delivering. It is the Bidder’s responsibility to manage and mitigate the risk of their offering. It is Owner’s responsibility to ensure that it conveys any potential concerns and issues before the contract is signed.
   4. The Clarification Phase provides the Bidder with an opportunity to identify their scope with a detailed specification and a simplified list of their tasks and financial streams. Owner has the right to accept or reject this proposal. Owner also has the right to identify its perceived risks, concerns, and issues which it will require the Bidder to mitigate and manage. The major deliverables of the Clarification Phase include the scope of the project, the simplified Risk Assessment (RA) Plan and the Risk Management Plan (RMP), the breakout of the ~~project~~ products/services price in a weekly risk report (WRR). The pre-planning should include all coordination and identification of all risks that cannot be controlled by the Bidder/ supplier.
   5. In many cases, one of the Bidder’s biggest risks (in terms of delivering the service with high satisfaction) is the client. Therefore, it is in the Bidder’s best interest to identify any issues or concerns with a Risk Management Plan (RMP) during the Clarification Phase.
2. PRE-PLANNING AND COORDINATION
   1. Bidders may be required to provide Owner with supporting documentation for any information listed in their submittals before entering the Clarification Phase.
   2. Owner requires that the Prioritized Bidder(s) lead(s) a Clarification Kick-Off Meeting to present its proposal, the simplified financial schedule, Risk Assessment (RA) and Risk Management Plan (RMP), and to identify additional issues or concerns that Owner may have. It is also an opportunity to meet all participants who may be stakeholders in delivering products/services. The Bidder is required to perform the following functions as part of, or in preparation for, this Kick-Off Meeting:
      1. Ensure that Owner has invited all its stakeholders and participants to the meeting (including client, sub suppliers, designer / AE, interested parties, etc.).
      2. Present the scope of services ("what is in" and "what is out").
      3. Present the simplified payment schedule and Risk Management Plan (RMP). This includes risks and potential mitigation to the risks.
      4. Identify Owner responsibilities.
      5. Propose the Weekly Risk Report (WRR) format.
      6. Field questions and concerns from client stakeholders.
      7. Listen to concerns, issues, and comments from Owner stakeholders.
      8. Propose a schedule to finalize Clarification Phase and the contract documents.
   3. Once the Clarification Kick-off Meeting is held, and if Owner is comfortable with the proposal, the Clarification Phase begins. The Bidder may be required to complete the following:
      1. Revisit the site/buildings/campus to do any additional investigating.
      2. Coordinate with all parties that will be involved with the delivery of products/services.
      3. Resolve concerns and issues with mitigating actions. Prepare to summarize resolutions in the final Clarification Phase Summary Presentation meeting.
      4. Finalize the Clarification Document (contract, WRR, payment schedule, RMP, scope of work).
3. CLARIFICATION DOCUMENT
   1. The final Clarification Document (i.e. MS PowerPoint presentation) will include the following:
      1. Executive Summary - high level summary of scope documents that clearly addresses what is in scope [being delivered] and what is out of scope for the project.
      2. Finalized scope documents which include details on how the tasks will be completed.
      3. Description of the end deliverable in terms of simplified metrics.
      4. Risk Management Plan (RMP) - The Bidder will create a document identifying risks that it does not control that could occur on this contract. This plan will also have mitigation strategies. This plan also must include concerns from Owner and how the Bidder/ supplier will minimize those concerns.
      5. Detailed scope descriptions– A specific breakout of every action required for the supplier to perform the work. Including all activities required by the supplier, client and client stakeholders to perform the work.
      6. Weekly Risk Report format (WRR)
      7. Project financial summary.
         1. The Bidder’s Original Price Proposal.
         2. A list of agreed/accepted Value-Added Options (with impact to price)
         3. A list of agreed upon Scope Changes or Additional Work with impact to price.
         4. A Price Breakout and Payment Schedule.
      8. Project and emergency contact list.
      9. PowerPoint presentation that describes the scope of the project in terms of cost, time, deliverables and how the deliverables acceptance will be decided.
4. CLARIFICATION SUMMARY MEETING
   1. The Clarification Summary Meeting is held at the end of the Clarification Phase and is used to present a summary of what was developed and agreed upon during the Clarification Phase. The final Clarification meeting is not a question and answer session. The Bidder and Owner stakeholders must not wait for the meeting to ask questions. All coordination and planning with Owner should be completed prior to the Clarification Phase Summary Presentation meeting on the RFP Procurement schedule.
   2. The Bidder should give a presentation, which walks Owner through the entire contract period and summarizes all of the coordination and planning done during the Clarification Phase. The Bidder should bring its team and all the documents specified in the Clarification Document. The Bidder should come with documents explaining what the Owner is responsible for during the contract period. The Bidder must convince Owner that they have minimized or mitigated all risks and will not be surprised once the service/production begins. The Clarification meeting presentation (and meeting minutes, if applicable) will become part of the contract along with the other documents from the Clarification Document.