



## **SAVE International**

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# **Pro Forma Request for Proposal for Value Consulting Services**

*This document is provided at no charge to organizations and Agencies considering the retention of a value consultant. The document is provided as a guideline only. The responsibility for modifying the document and producing a specific Request for Proposal resides entirely with the organization, agency or individual producing such document.*



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## List of Exhibits

EXHIBIT "A" - Scope of Work (Optional)



## 1.0 Introduction

Insert Name of Client (“the Client”) is seeking a qualified value consultant to provide value analysis, value engineering, value enhancement, value management (SELECT ONE) services related to Insert name of project, product, system or study object.

Describe project, product, system or study object...

The objectives of the value consulting assignment are:

- To identify potential changes to the project, product, system or study object design that would satisfy the essential functions of the project, product, system or study object at a lower (capital or life cycle) cost;
- To identify potential changes to the project, product, system or study object design that would better accomplish the essential functions of the project, product, system or study object while providing better overall value;
- To improve confidence in the effectiveness of the design (if applicable)
- To provide additional input into selected project, product, system or study object decisions (if applicable)
- (Other objectives as appropriate)

## 2.0 Scope of Work

It is intended that the selected value consultant will conduct Insert Number value workshop(s) to be conducted in Insert Location over a period of Insert Number month(s).

The work will consist of the following individual tasks: (or as detailed in Exhibit “A” Scope of Work:)

- Communicating with the Client’s project manager either in person or by telephone, and reaching a decision about the details of the value study including the duration of each proposed workshop.
- Communicating with the Client’s project manager either in person or by telephone to review the project, product, system or study object and the project, product, system or study object issues and reach an agreement regarding the date for the value workshop (s) and the team members to be provided by the Client, if any, and by the value consultant, if any.
- Prior to the value workshop accomplish the following activities:
  - Coordinate workshop logistics;
  - Review the design documents and other documents about the project, product, system or study object provided by the Client with the value team members;
  - Using information provided by the Client and by the design team, prepare cost, energy, life-cycle cost, space, and/or other models as appropriate; and
  - Conduct a validation of the estimated project, product, system or study object costs.



- *Workshop(s) are to be conducted using a job plan consistent with SAVE International guidelines for value studies. The workshop(s) will be conducted in the location identified in this Request for Proposal. The facility in which the workshop(s) will be conducted will be provided and paid for by the Client or Consultant (INSERT ONE). Each value workshop will consist of the following six phases conducted over a period of Insert Number consecutive days:*
  - *Information Phase*
  - *Function Analysis Phase*
  - *Creativity Phase*
  - *Evaluation Phase*
  - *Development Phase*
  - *Presentation Phase*
- *Following each value workshop, conduct the following activities:*
  - *Submit a preliminary value report in electronic and hard copy format, consisting of the workshop work products within fourteen (14) days of the completion of the value workshop;*
  - *Review the design team written responses to the preliminary value report, consult with the value team members as necessary, and prepare for a decision-making meeting;*
  - *Attend the decision-making meeting and provide information to the decision-makers at the meeting relative to the pros and cons of each value recommendation. Respond to the concerns raised by the design team and others, and assist the designer, design project manager and the Client project manager in reaching decisions about whether to incorporate each value recommendation into the project design.*
  - *Prepare a draft final report within fourteen (14) days following the decision-making meeting that documents the entire VE study, including the decisions made.*
  - *Make appropriate revisions to the draft final report based on comments from the Client project manager, and provide an electronic and Insert Number hard copies within fourteen (14) days following receipt of comments from the Client project manager.*

### 3.0 Required Qualifications

The value consultant shall provide the following team members:

- *A value team leader who is certified by SAVE International as a Certified Value Specialist (CVS);*
- *An assistant team leader who, at minimum, is certified by SAVE International as an Associate Value Specialist (AVS);*
- *Technical specialists with appropriate qualifications (List Required Specialists including quantity surveyors if required); and*
- *Supporting clerical and administrative staff to participate in the workshops and assist with the study documentation.*

The value consultant shall demonstrate corporate experience pertinent to the subject matter of the value study.



## 4.0 Special Requirements

The selected value consultant will be invited to enter into a contract in the standard SAVE International Form of Contract for Value Consulting Services and to begin work within **fourteen (14)** days of notification to proceed.

**Insert special conditions of contract, if any, including expectations of the value consultant related to venue, equipment and related matters.**

## 5.0 Proposal Format

Proposals are requested in the following format:

- Cover Letter
- Table of Contents
- Introduction/Understanding of Scope of Work
- Proposed Methodology and Delivery Schedule
- Corporate Qualifications and Experience (including client references)
- Brief Biographies of Key Personnel
- Fee Proposal (include under separate cover)
- Other Considerations

Please include detailed resumes and additional corporate information, if so desired, in appendices.

All Proposals shall be clearly marked on the outside with the following:

“Proposal for Value Consulting Services for **Insert Project, Product, System or Study Name**”

## 6.0 Selection Process

### 6.1. Submission Deadline

Proposals are due by **Insert Date and Time** at the following address:

**Address Line 1**  
**Address Line 2**  
**Any City, Any Country**

Electronic copies may be transmitted by e-Mail to:

**Insert e-Mail Address**

Proposals received after the date and time specified will not be considered.



## 6.2. Inquiries During the Proposal Preparation Period

Inquiries during the proposal preparation period may be addressed to:

Insert Name  
Insert Title  
Address Line 1  
Address Line 2  
Any City, Any Country

Insert Telephone and Facsimile Numbers  
Insert e-Mail Address

Answers provided to proposer questions are intended to improve the proposer's understanding of the requirements of the request for proposal and the project requirements. No verbal information provided to proposers will in any way change the requirements or provisions of this request for proposals. Any changes to the Request for Proposal will be made in writing in the form of an addendum that will be sent to all holders of record of the Request for Proposal.

## 6.3. Evaluation and Selection Procedures

All proposals will be evaluated on the basis of the following technical criteria:

<u>Criterion</u>	<u>Weight</u>
Understanding and Approach	25%
VE Team Leader Qualifications	25%
VE Team Member Qualifications	25%
Previous Experience and Performance	15%
Availability and Schedule	10%

Depending on the results of the evaluation of proposals, interviews may be conducted with a short list of the proposers to make the final selection of the firm to conduct this work. If interviews are required, the shortlisted proposers will be advised of the date and time for their interview. Each firm will have one hour for their interview process. The first 30 minutes will be spent in a formal presentation by the firm expanding on the information provided in their proposal. The second 30 minutes will be spent responding to questions from the interview panel. The final selection will be based on the same criteria listed above, and will use the same weights as indicated for the proposal evaluation.

Once the highest rated firm has been selected, **Insert Name of Client** will endeavor to negotiate a contract with that firm. Should the two parties not be able to successfully negotiate a contract for the services, negotiations with the highest rated firm will be terminated and negotiations will be opened with the second highest rated firm and so on.

**Insert Name of Client** reserves the right to reject any and or all proposals.



## EXHIBIT “A”

### SCOPE OF WORK FOR VALUE STUDY

The Value Consultant will provide the following services in accordance with this scope of work and the terms of the Agreement:

#### CONSULTANT STUDY TEAM

The Value Consultant will provide the study team members identified below:

Name/Discipline	Required Qualifications
/Team Leader	
/Asst. Team Leader (if applicable)	
/ Team Assistant (if applicable)	
/ Subject Matter Specialist (if applicable)	
/ Subject Matter Specialist (if applicable)	
/ Subject Matter Specialist (if applicable)	
/ Subject Matter Specialist (if applicable)	
/Cost Estimator	

All other team members will be provided by the Client, at no cost to the Value Consultant. The Value Consultant will communicate directly with all study team members as needed relative to scheduling, pre-workshop, workshop and post workshop activities.

#### PRE-WORKSHOP ACTIVITIES

The Value Consultant will perform pre-workshop activities to include those tasks which must be accomplished in order for the study team to be able to efficiently and effectively perform in the workshop.

These activities will consist of:

- scheduling study tasks
- scheduling and coordination with study team members
- assisting the Client with scheduling study participants
- coordination of the necessary project documentation on the project for distribution by the Client to the study team members
- document review by Value Consultant-supplied team members



- Preparation of cost, energy, life cycle cost, space models, etc. contingent on supply by Client of the information needed for their preparation

The Client will distribute the project documents and materials to be studied to the study team members at least five working days prior to the workshop start. All team members except the cost estimator are to spend \_\_ (4 to 16) hours reviewing the project documents and materials prior to the start of the workshop. The cost estimator will spend \_\_ (12-24) hours reviewing the documents and validating the cost estimate provided by the Client.

## WORKSHOP

The Value Consultant will conduct a \_\_-hour value workshop using a six-step job plan that is consistent with the best management practices recognized by SAVE International. The workshop will include an Information Phase, a Function Analysis Phase, a Creative Phase, an Evaluation Phase, a Development Phase, and a Presentation Phase. A (site, plant or facility) visit for the team members will be conducted on the first day of the workshop. (optional)

The workshop will be initiated by presentations from the Client, who will describe the objectives of the Assignment and any constraints that will be placed on the study team. The designers will explain specifically how the design accomplishes the Client's objectives and the details of that design. The workshop will include a detailed function analysis of the major project elements. The team will generate a list of ideas for project improvement followed by an evaluation of those ideas. This evaluation will include input from key Client decision makers before proceeding with development of recommendations. On the last day of the workshop, a presentation of the recommendations will be provided to the Client decision makers and key representatives of the design team.

The workshop will be held at \_\_\_\_\_, in \_\_\_\_\_, \_\_\_\_\_. The cost of providing the workshop refreshments and all other costs associated with the meeting facilities, including telephone, photocopying, and faxing will be borne by \_\_\_\_\_.

To ensure that the study team has complete information about the project criteria, the Client will provide at a minimum, the Client Assignment Manager and appropriate key members of the design team for the first day and last day presentations as well as the mid-point review meeting.

## POST WORKSHOP

The Value Consultant will conduct a four-hour post-workshop study Decision/Implementation Meeting at a location in the \_\_\_\_\_, \_\_\_\_ area following receipt by the study team leader of the written designer responses to the Preliminary Report. The purpose of this Decision/Implementation Meeting is to assist the Client in making decisions regarding acceptance or rejection of the individual value proposals. Attendees will consist of key Client staff, key designer staff and the study team leader.



## SCHEDULE

The work will be performed in accordance with the following schedule:

Pre-Study Activities	Upon receipt of a signed contract and notice to proceed
Workshop(s)	***Insert workshop dates***
Preliminary VE Study Report	Fourteen (14) days after completion of the Workshop
Decision/Implementation Meeting	On a date to be determined by The Client, The Value Consultant, and the designer
Draft Final VE Study Report	Fourteen (14) days after the Decision/Implementation Meeting
Final VE Study Report	Fourteen (14) days after receipt of CLIENT comments on the draft report

## DELIVERABLES

This value study effort will include the following deliverables, all of which are related to the results of the workshop. These deliverables are:

- Study Team Presentation Handout
- Preliminary Value Study Report
- Draft of the Final Value Study Report
- Final Value Study Report

The Preliminary Report will be prepared in the Value Consultant report format, and will be a compilation of the handwritten products developed in the workshop.

The draft Value Study Report will be prepared in the Value Consultant report format. The purpose of this draft report is to give the Client and other appropriate reviewers the opportunity to check the final Value Study Report prior to its final issuance.

The final Value Study Report is the final documentation of the VE study. The report is a finalized version of the Draft Report including the incorporation of the Client's comments. The submittal of the final report concludes the Assignment.

THE CONSULTANT will provide the Client with the following number of copies of each report:

- |                                |                                     |
|--------------------------------|-------------------------------------|
| Preliminary VE Study Report    | _____ (fill in # of copies desired) |
| Draft of Final VE Study Report | _____ (fill in # of copies desired) |
| Final VE Study Report          | _____ (fill in # of copies desired) |