



# **Bid BOMA: Building Relationships to Last**

BOMA Oakland/East Bay

**BOMA OEB Luncheon  
June 13, 2024**

# Bid BOMA

## Key Nuggets

BOMA Oakland/East Bay held an interactive roundtable luncheon with over 65 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 can property management teams proactively cultivate relationships with potential vendors before initiating the bidding process? What specific criteria do you prioritize beyond cost when selecting vendors to bid to, and how does this contribute to relationship building? In what ways can property management teams and vendors establish trust and mutual understanding during the initial stages of the bidding process? How have networking opportunities within BOMA and other industry networks facilitated the identification of reputable vendors?
- 2. DEVELOP RFP:** What elements can property management teams incorporate into RFPs to encourage vendors to demonstrate a deep understanding of the property's unique needs? How do you strike a balance between providing comprehensive RFPs and avoiding overwhelming potential vendors with unnecessary detail? From both perspectives, how does the timing of various stages in the RFP process impact collaboration between property management teams and vendors?
- 3. REVIEW & COMPARE BIDS:** What strategies have been effective for promoting open communication between property management teams and vendors during the bid review process? How can property management teams ensure clarity and fairness when requesting clarifications and conducting best and final requests? What are some best practices for providing constructive feedback to vendors during the bid review process?
- 4. AWARD CONTRACT:** How do you balance objective criteria with subjective factors such as vendor reputation and compatibility with the property management team when awarding contracts? What approaches have you found effective for transparently communicating with both winning and non-winning bidders? How can property management teams incorporate feedback mechanisms to strengthen relationships with non-winning bidders and encourage future collaboration?
- 5. CONTRACT ADMINISTRATION –** What proactive measures can property management teams take to maintain open lines of communication and address issues promptly during contract administration? From both perspectives, what strategies have been successful in resolving conflicts and challenges while preserving the vendor-client relationship? How do you utilize performance metrics and regular check-ins to ensure mutual satisfaction and identify areas for improvement throughout the contract period?

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

## Discussion Topics:

**BIDDING:** How can property management teams proactively cultivate relationships with potential vendors before initiating the bidding process? What specific criteria do you prioritize beyond cost when selecting vendors to bid to, and how does this contribute to relationship building? In what ways can property management teams and vendors establish trust and mutual understanding during the initial stages of the bidding process? How have networking opportunities within BOMA and other industry networks facilitated the identification of reputable vendors?

- Establishing relationships with follow-ups, practice, and providing value (example – lunch & learn/client education)
- Transparency, honesty, and communication are key
- Suit Up and Show Up – Attend regularly and get to know people at a personal level
- Responding to calls/emails in a timely manner
- Leverage BOMA membership - Getting references from other BOMA members
- Must have suggested alternatives
- Give people a chance
- Don't be an order taker
- Be authentic and reputable
- Trust – In-person connection, efficient communication (ex: security access, COIs, etc.), vendors (depending on the trade) involving engineers in process

**DEVELOP RFP:** What elements can property management teams incorporate into RFPs to encourage vendors to demonstrate a deep understanding of the property's unique needs? How do you strike a balance between providing comprehensive RFPs and avoiding overwhelming potential vendors with unnecessary detail? From both perspectives, how does the timing of various stages in the RFP process impact collaboration between property management teams and vendors?

- Flexibility for specs that Property Managers need in RFP
- Communication is key - asking what the client's budgets are improves efficiency and transparency
- Have an interview. Discuss information on floor plans, area size, tenants, equipment, anything above standard RFP. Release RFP with enough time for a site walk and bid review, including a realistic budget cost and timeline/completion date
- Collaborate early and often on RFPs
- Provide a well-defined SOW

**REVIEW & COMPARE BIDS:** What strategies have been effective for promoting open communication between property management teams and vendors during the bid review process? How can property management teams ensure clarity and fairness when requesting clarifications and conducting best and final requests? What are some best practices for providing constructive feedback to vendors during the bid review process?

- Q & A period shared with all in Well-structured interview
- Relevant experience and projects included
- Properties track record with vendors
- Relationship with respondents
- RFP should have a clear disqualifying criteria
- Share questions & responses with all bidders

## **Discussion Topics (Continued):**

**AWARD CONTRACT:** How do you balance objective criteria with subjective factors such as vendor reputation and compatibility with the property management team when awarding contracts? What approaches have you found effective for transparently communicating with both winning and non-winning bidders? How can property management teams incorporate feedback mechanisms to strengthen relationships with non-winning bidders and encourage future collaboration?

- Award contract with relationship building in mind
- Consider options based on the quality of the source
- Both sides must be direct in communication/feedback
- Show and tell
- More detail is better

**CONTRACT ADMINISTRATION:** What proactive measures can property management teams take to maintain open lines of communication and address issues promptly during contract administration? From both perspectives, what strategies have been successful in resolving conflicts and challenges while preserving the vendor-client relationship? How do you utilize performance metrics and regular check-ins to ensure mutual satisfaction and identify areas for improvement throughout the contract period?

- Weekly Check-ins
- Make promises, follow-up, and complete
- Develop relationships before bid