



Writing a Request for Proposal

Nine Essential Elements of an RFP

By Eric Leland & Jason Salter
FivePaths, LLC

Summary

Writing a Request for Proposal may sound like a headache, especially for a technology project, but it doesn't have to be difficult. You can do much of this work yourself without hiring consultants.

An RFP offers your organization the invaluable opportunity to recruit the best possible vendors for your particular project. Many technology projects must satisfy a large list of requirements, most of which will have a variety of possible solutions. Understanding just how each vendor will approach your specific requirements helps you to understand which vendor — and solution — is the best fit for your needs. Asking potential vendors to provide detailed information early on can save your organization a lot of money and headaches down the road.

Elements of an RFP

Before you circulate your RFP, ensure that it is comprehensive by considering the following elements.

✓ Organizational Overview

Provide a short description of your organization's mission and projects. This gives the vendor some background and focus as to the needs of the project.

✓ Project Goals

Identify the programmatic goals of the project. This allows the vendor to see how the project will serve the needs of the organization, and whether it fills a particular niche or program area or is a system that offers general support to numerous organizational goals.

✓ Target Audience

Describe who will be using the project deliverables and how large that audience is. Include any significant technical needs your audience may have. Describe how they will interact with the site, the organization, and each other throughout the project.

✓ Project Deliverables and Specifications

Identify the major components of the project. Describe the required features and design of each component, along with the support services you will require from the vendor both during development and after the project launch. The more details here, the more accurate the cost estimates will be. For areas where there are few rigid requirements, outline your goals and invite proposals for creative solutions.

✓ Project Requirements

Describe the administrative requirements and guidelines for the project, including completion dates, expectations on project testing and evaluation during development, intellectual property rights, billing requirements, and the maximum price range vendors should bid within. (Note that this price range should be lower than your internal budget for the project. Always allow yourself space to negotiate up if necessary.) Indicate where you want vendors to contribute their own recommended solutions, and where they should adhere to your exact specifications.

✓ Proposal Format

Describe the elements required in vendor bids, such as budget and cost breakdown per deliverable; tasks and timeline chart; staff roles and responsibilities; and vendor description. Outlining these elements ensures that vendors will give you what you want, and allows you to directly compare (and filter out) vendors.

✓ Request for References

Describe what information you require in references, such as how recent or long-term the clients were, what kinds of clients you would like to hear from, what kind of contact information you need, whether they are current or past clients, and so on.

✓ Proposal Delivery Instructions and Contact Information

To whom should proposals be addressed? How many copies should be sent? How should they be delivered (fax, email, mail), and who is the point of contact for phone inquiries? Is this a closed “by invite only” RFP or open, meaning you allow (or encourage) vendors to share this proposal?

✓ Proposal Evaluation Timeline

Identify the vendor selection process and timeline. Consider that vendors may provide useful feedback during phone calls that necessitate changing a part of the RFP — schedule this in so bidders know when to expect more clarifications. Adhering to a set process communicates to vendors that you know what you are doing. Vendors often spend non-billable time on proposal writing, so managing their expectations of your process helps build harmonious relationships.

Beware of the Feature List

Don't over-rely on feature lists of the specific functionality you are looking for! While it is important to outline what you need, too much detail can result in bidders who simply deliver to your specification, without thinking strategically. Overly detailed features lists discourage vendors from offering their best approach to meeting your goals and can lock you into particular solutions or approaches. A feature list moves you away from

goals and toward technologies — the expertise of the vendor you hope to hire. In insisting on a specific collection of web tools, you risk missing out on the best-considered solutions for your particular project.

Disseminating Your RFP

Depending on your project needs, you may choose to target your RFP to specific firms, or broadly to attract more responses. A closed RFP approach targets a smaller group of known firms — vendors that have come recommended from trusted sources or that you have worked with successfully in the past. By closing the RFP, you are indicating that only invited firms may respond. This approach works well if you have a network of vendors already and the project is an overall match to their skill sets. Working with a consultant can help if you still want a closed process but need help identifying recommended vendors.

Following an open process helps to attract more responses. An open process can help especially in situations where there may be a wide variety of approaches to meeting your needs, which can result in bigger cost and timeline disparities between responses. There are many resources for listing RFPs, some general and others that target specific industry sectors. Some example resources include The RFP Database (which you can access through its main [website](#) as well as via [LinkedIn](#)), [The Foundation Center](#) (which lists philanthropy/nonprofit RFPs), and [FindRFP](#) (which helps connect government contractors and buyers).