



Planning for Your RFP

Module 1: Planning for Your RFP

In this module, you will:

- Identify key team members to be part of the RFP process
- Plan the timeline for your RFP and set up project management structures

1.1 Best Practices

Once your department or agency leadership has secured approval for a new service or purchase, or once you have noticed that a contract is soon to expire, you might be tempted to immediately begin writing your RFP! However, jumping into RFP writing without conducting proper planning can create problems down the road.

As you dive into planning for this RFP, you are committing to a results-driven approach to writing an RFP that is likely a departure from business as usual. You will be moving from viewing an RFP as a necessary hurdle to get a vendor hired to seeing the RFP as a strategic opportunity to help your department or agency achieve its strategic goals and improve outcomes for residents. This is an exciting journey to embark on!

In this module, we will discuss two important planning activities to devote time to before you begin conducting research on your service or product and writing your RFP. Building your project team with care and developing a project plan will lay the foundation for a successful RFP.

Building a Well-Rounded Project Team

First, identify which internal team members have a role to play or would be helpful to include in each stage of the RFP process, from early planning and research through contract execution. These individuals might include program and procurement/purchasing staff, department/agency leadership, managers, end-users of the service or product, legal or finance teams, and staff who have procured similar services in the past. You will identify and engage additional external stakeholders in the next module, as they will provide valuable insight into your target population, best practices, and the feasibility of your approach.

Thoughtfully building your internal project team and including important voices from within your jurisdiction will enrich the final content of your RFP, help you align with leadership's priorities, and reach alignment on contract outcomes. This effort will also help you and your team gain early clarity on roles and responsibilities, avoid instances of duplicated work, and complete all tasks promptly.

KEY CONCEPT: CHARACTERISTICS OF STRONG RFP TEAMS

1	Defined role of project manager/coordinator. It can be helpful to designate one person to coordinate roles, keep RFP development on schedule, and manage the process overall. This person should be someone who can devote adequate time to this project, keep documents and drafts well organized, facilitate meetings, and help to reconcile differences in opinions.
2	Designated responsibilities among procurement staff and program/department staff. Depending on your jurisdiction, RFP development and contracting responsibilities may fall to purchasing or procurement staff, department or program staff, or (as is often the case) be divided among these groups. Early on, make sure your team includes expertise on both the subject matter AND procurement processes, rules and regulations. Gain clarity on roles for each team member.
3	Perspective and input from front-line staff. The staff closest to the problem that you are aiming to address with this RFP will have the most in-depth knowledge about what the service or product really looks like on the ground. Involving front-line staff in the RFP planning and drafting process will allow these individuals to provide valuable input on a service or product that they will be interacting with very closely.
4	Identified decision makers and RFP approval authority. Unanticipated reviews, or surprise last-minute input from decision makers (who you might not have known wanted to weigh in!) can delay the release of your RFP. Early in your planning, identify which decision makers will need to review or approve at each step. For example, will you need to consult your legal team? How much time will they need to approve your document? These decision makers may not have an extensive role early on, but identifying their role and putting this RFP on their radar is good practice.
5	Clarity on the team's time and capacity. Many state and local government staff wear a variety of hats and balance competing priorities. When building your team, be realistic about the amount of time each member can or will devote to this RFP. Can you carve out small roles for folks you think will have valuable input but do not have the time to be intimately involved (e.g., department staff that recently wrote similar RFPs, legal, finance, or data teams)?

Developing a Project Plan

At this early stage, it may be hard to know what activities lie ahead. While it can be tempting to wait to address tasks as they come up, planning ahead will help you complete your RFP and final contract much more efficiently. Even if the RFP content is terrific, poor project management practices can derail what otherwise would have been a very successful RFP or an effective contract. For example, in your previous work, you might have seen the harmful impact of waiting until the last minute to work on an RFP or forgetting to consult with a group of key stakeholders.

With your RFP team and in consultation with your procurement/purchasing staff, you should develop a project plan (you might call this your work plan or timeline) that includes all of the major steps that will need to take place before your jurisdiction executes a contract with the successful proposer. In building this project plan, you will start to lift the curtain on what the next months will look like. A timeline or work plan can also accomplish the key task of helping to hold all members of your team accountable—to motivate action—especially if other responsibilities are likely to compete for their time and attention.

When developing your project plan, you likely will want to start with the end date – the date by which your contract will be executed (i.e., when you need the vendor to start work) and work backwards. Check with your procurement/purchasing staff to see how long similar procurements have taken in the past to make sure your timeline is reasonable. As you build your timeline, you might find yourself with less time than you expected for each of the activities leading towards an executed contract. If you find yourself needing to reduce the timeline, consider which activities you can conduct in parallel or where you could reduce time between internal deadlines. The one place you should never cut time from is the proposal response period. The quality of proposals you receive will be much higher if you give proposers sufficient time to prepare thoughtful responses!

1.2 Example

In one jurisdiction that the GPL has worked with, department staff use a project planning tool to set target dates for key activities associated with each upcoming RFP. This tool also helps the department identify which responsibilities belong to program staff and which belong to procurement staff. The example below is a snapshot of some initial activities that the department includes in the planning stage for an RFP.

Name of RFP: _____

Staffing leads -

PROGRAM STAFF:

PROCUREMENT STAFF: -

TASK		RESPONSIBILITY			TARGET DATE
		Procurement	Program	Staff Member(s)	
1.0	Planning				
1.1	Determine source of funding, finalize the project budget, and council authority				
1.2	Develop project timeline for major activities – release date, submission date, and pre-proposal conference				
1.3	Choose procurement method				
1.4	Conduct strategic planning to establish goals, performance metrics				

MODULE 1: WORKBOOK

1.3 DISCUSSION QUESTIONS

Gather your team and brainstorm answers to the questions below. Your answers to these questions will help inform the creation of a project team and project plan in the next section.

1. In your jurisdiction, what responsibilities does your procurement/purchasing staff hold for a typical RFP (in comparison to program/department staff)?

2. Whom might you need to consult to check that your team is following all legal and policy requirements as you plan and draft your RFP?

3. Who in your jurisdiction has recently completed a similar RFP and could have valuable input for your project team?

4. Looking back at past RFPs, which steps took the longest? Where were delays most likely to occur?

1.4 PLANNING PROMPTS

1. Build a project team matrix, similar to the version below, to identify the internal stakeholders for the RFP project team. We have filled out row one as an example.

INTERNAL STAKEHOLDER ROLES			
Name and position of internal stakeholder	In what areas can this person offer support, critical input, or feedback?	What does this person’s capacity look like during the next four months?	Stakeholder role
Example: Jane Martinez, Performance Analyst in the Mayor’s Office	Example: Jane would provide helpful input on the performance metrics we develop to monitor the vendor’s work.	Example: Jane thinks she can devote 5 hours per month for the next 4 months.	Example: ___ RFP drafting team <u>X</u> Consultant ___ Decision-maker ___ Supporter

2. Build your project plan. Below we share a basic structure as an example. You will likely want to create a table similar to this one and add additional rows for activities specific to your jurisdiction or this RFP.

PROJECT TIMELINE		
Activity	Target date or date range	Notes (e.g., who will be responsible, what this activity will include, what could potentially delay this activity)
Basic project organization completed (budget identified, timeline finished, & project team created)		
Information gathering completed		
RFP draft completed		
RFP review by decision makers		
RFP release date		
Deadline for proposer questions		
RFP responses due		
Evaluation committee first-round scoring completed		
Interviews/demos held		
Awardee(s) selection date		
Contract negotiations and drafting		
Contract approval process		
Contract executed		