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# Finalizing Your RFP

# Module 7: Finalizing Your RFP

## In this module, you will:

- Understand best practices for organizing and structuring your RFP draft, and identify how best to solicit feedback on your RFP draft.

## 7.1 Best Practices

You now have most of the major substantive components of your RFP, including a problem statement, goals and objectives, metrics and a contract management plan, a scope of work, payment structure, evaluation and selection criteria, and proposer response specifics. It is time to begin putting the pieces together to form a full RFP draft!

## How to Structure Your RFP

Your jurisdiction may have a defined RFP template or structure you are required to follow. If you have flexibility with the structure, you might consider organizing your RFP in the following order. The bolded areas refer to the specific RFP components you developed in prior modules.

### Sample RFP Outline:

1. Title page and/or summary page with key project dates, facts and contact information
2. Table of contents
3. The opportunity
  - Project summary and **outcome goals**
  - **Problem statement**
  - Other relevant background information
4. Scope of work
  - **Description of services to be provided**
  - **Performance metrics and active contract management plan**
5. Proposal content and submission process
  - **Submission requirements and checklist**
  - Information about schedule, pre-proposal conference, how to submit questions, deadline, and submittal process
6. How we choose
  - **Evaluation criteria**
  - Selection process, and protest information
7. Terms and conditions
8. Attachments, exhibits and required forms (e.g., template contract, pricing sheet, or diagrams)

You will notice that we have not discussed some of these sections in this guidebook, such as “Terms and Conditions.” Some components of RFPs are very specific to each jurisdiction, and you likely have required legal and policy language already developed that will become part of your RFP.

If your jurisdiction or department does not already have an RFP template, once you have an organization and structure that you have found to work well on a few RFPs, consider creating one. A template can reduce internal drafting and review time, and let you focus more on updating the specific sections that need to change from one RFP to the next. A consistent RFP appearance can also make the experience of responding to an RFP more familiar for proposers! We recommend jurisdictions revisit and consider updating their template every few years.

Regardless of how you choose to organize your RFP, it is important to keep in mind that your RFP should be a friendly and welcoming document. Picture a person or team trying their best to offer you a strong proposal – does your RFP facilitate that? Make it easy for the proposer to understand exactly what you want them to submit, exactly how they will be evaluated, and exactly what work they will be expected to do if selected as a vendor. Also clearly and honestly share what you don't know, and where you want vendors to offer their creative approaches or expertise in solving your problem! Keep in mind that your RFP is the first signal of what it will be like to work with your team and your department, so help the vendor see that your government will be a great client. Here are some tips:

- Make the document easily navigable by including page numbers, descriptive section headers, and a table of contents.
- Place important project-specific information at the front of the document, and terms and conditions towards the end.
- Write for humans! Do not use agency-specific terms or complex jargon that might be hard for an outsider to understand.
- Keep your RFP to a reasonable length! Think critically about whether components of your RFP add value to either the proposer's understanding of the work, or the legal or policy requirements that govern the process.

## What to Look for When Reviewing Your RFP

Once you have a solid draft of your RFP, you should gather members of your team and other internal experts for an internal RFP presentation. During this meeting, present the RFP draft, identify assumptions, and poke holes in your team's thinking and structure. This meeting is also a great moment to ask critical questions and revisit the findings of your stakeholder research to be sure you have addressed major concerns in the RFP. Keep in mind that by including team members who have not been as "in the weeds" on RFP drafting, you can often surface great ideas.

Using a checklist to run through your RFP can be helpful to make sure there are not any concerns before publishing. Here are examples of items for which you might check:

- Does the RFP flow in a logical manner? Does it feel like each section builds off the previous one?
- Do you clearly indicate why the RFP is being issued and what the desired outcome of the procurement is?
- For every submission requirement, is it clear what the proposer needs to do or submit to respond to that requirement? Is it clear how the submission requirements connect to the evaluation criteria?
- Is the RFP fair? Is there any language that gives specific vendors an advantage or that preferences the incumbent vendor? Do your evaluation criteria reward certain vendor characteristics that do not actually correspond with what is needed to do the work? Is the timeline for responses likely to make it difficult for certain firms to respond?
- Do you provide the proposer with key dates and an estimated timeline?
- Do you indicate how your staff will respond to questions proposers may have while the RFP is open?

## 7.2 Examples

The Government Performance Lab has many examples of RFPs that incorporate these results-driven contracting techniques on our website: <https://govlab.hks.harvard.edu/government-documents>. We also encourage you to take a look at our Results-Driven Contracting Solutions Book: [https://govlab.hks.harvard.edu/files/results\\_driven\\_contracting\\_brief.pdf](https://govlab.hks.harvard.edu/files/results_driven_contracting_brief.pdf).

Making your RFP succinct and straightforward can do wonders to make the RFP and associated process inviting for proposers. The City of Boston demonstrated this in 2015 with their RFP to solicit a redesign of their main government website – boston.gov. The City structured this RFP as a slide deck: [https://www.cityofboston.gov/Images/Documents/COB\\_Web\\_DesignRFP2.pdf](https://www.cityofboston.gov/Images/Documents/COB_Web_DesignRFP2.pdf)

# MODULE 7: WORKBOOK

## 7.3 DISCUSSION QUESTIONS

Gather your RFP drafting team and discuss the questions below.

1. Return to the RFP components that you completed in past modules. If some time has passed since your team drafted some of these components, consider the following: has anything changed about your understanding of the problem or goals as you have drafted other RFP sections? Is there some additional research you need to conduct to make sure what you are asking of proposers and vendors is reasonable?

2. If any additional questions have come up during RFP drafting, make a list of the remaining questions that you will need to answer with your RFP team. Additionally, think about what your action plan might be to resolve those last remaining questions.

3. What will your plan be for ensuring that all interested parties hear about your RFP? With your team, put together an outreach strategy focused on obtaining vendor diversity. You might include:

- Websites where the RFP or a link to the opportunity could be posted publicly. If you work for a city or county, explore whether any state vendor portals or advertising platforms could host notice of your RFP.
- Make a list of vendors that could receive notification of the opportunity. Consider especially how you might advertise to and seek out minority, small and women-owned businesses. What companies are qualified to do the work, but may historically not have obtained their proportional share of contracting opportunities from your jurisdiction?
- Send to industry and trade groups or other associations.
- Issue a press release if this is a very high-priority RFP to which your government wants to draw major attention.

## 7.4 DRAFTING PROMPT

1. Your task in this module is to combine the previously drafted sections of your RFP with any additional necessary information to create your RFP draft, and take proper review and approval steps to finalize your RFP for release.