



REQUEST FOR PROPOSAL (RFP) PROCESS INSTRUCTIONS

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A Request for Proposal (RFP) is a prospectus inviting consultants and vendors to apply to work on a specific project. An RFP outlines all of the work and deliverables required of a vendor or consultant for the project and provides a means for an organization to evaluate the ability of various contractors to perform the required services. It is different from an open bidding process in that an RFP is usually targeted to pre-selected potential contractors.

Organizations should use this RFP process or a similar process when selecting vendors for services and/or consultants.

You should consider the following issues and take the following steps when undertaking an RFP process:

When Do You Need an RFP?

An RFP is used for work that requires expertise beyond what is available within your organization, and enables your organization to get the best work and deliverables by soliciting proposals from several experts. An RFP is used to obtain services such as feasibility development strategies, studies, graphics, and design from outside specialists. An RFP is not usually used to obtain bids for purchasing supplies and materials.

Who Should Be Sent the RFP?

You should send the RFP to at least three consultants who are qualified to perform the work. Before you contact any prospective consultants, it is important to consult with your SBS contract manager about who will be sent the RFP.

The RFP process must be open; in addition to specific prospective consultants to whom you send the RFP, anyone wishing to respond to the RFP must be given the opportunity to do so.

Contacting Consultants

After your SBS contract manager has approved the consultants to whom you will send the RFP, contact prospective consultants to determine whether they are interested in submitting a proposal. Once this is done, the RFP should be issued to all those who have indicated interest in responding.

Responding to the RFP

Allow the consultants sufficient time to respond to the RFP. The length of time can vary depending on the nature of the proposal. On average, three weeks is enough time to respond to an RFP.

After you distribute the RFP, you may want to contact prospective consultants in order to set up a pre-submission conference. The purpose of the pre-submission conference is to discuss and clarify the project, the scope of work, and other details such as insurance requirements, the budget, billing procedures, and Division of Labor Services requirements. The pre-submission conference should take place one week after the consultants have received the RFP.

Deadline for Submission

As a general rule, the deadline for receipt of proposals should be within two to three weeks after you issue the RFP or after the pre-submission conference, although time frames may vary according to your requirements for specific projects.

Proposal Criteria Review

Proposals are generally judged on the following criteria:

- **Quality of Proposal:** The proposal should be indicative of the type of work that a consultant will do. If a proposal is drawn up carefully and thoroughly, it is an indication that the consultant is concerned about doing a good job.
- **Track Record:** The consultant should have completed similar studies or products, preferably recently. The consultant should provide copies of their results for your review if you request these,
- **Time:** The consultant must have the ability to complete the specified work within the designated time frame.
- **Staff and Staff Resumes:** The consultant should provide the names and backgrounds of staff who will work on the project, and should include resumes for these staff members.
- **Cost:** The proposed cost for completing the work should be reasonable, and should be commensurate with the time, staff, and production costs involved. You should also consider the cost in relation to the other submitted proposals.
- **References:** Other past completed contracts should be investigated to ensure a good working relationship was established with clients and that they were satisfied with the work performed.

INFORMATION TO BE INCLUDED IN THE RFP

Overall Scope of RFP

When sending your RFPs to prospective consultants, you should accompany the RFP with a cover letter introducing the project. A sample RFP Cover Letter is available on the SBS website.

When you issue an RFP, you are required to inform prospective consultants of certain information about the project in addition to the description of services. This information can be included within the RFP itself, within the cover letter, or a combination of both. Prospective consultants must be informed of the following:

- The type of professional service or product desired (e.g., market analysis, feasibility study, graphic design and logos, or promotional brochure);
- The date by which proposals are due;
- Whether there will be a mandatory pre-submission meeting, and, if so, when and where this will be held;
- Expected commencement date for the work and expectations on timeframes for completion;
- An individual to whom the consultant can address questions prior to proposal submission;
- The number of copies of the proposal required and where they should be sent;
- If appropriate, a map of the target area should be included with the RFP.

Specific RFP Format

Your RFP must include the following information:

- **Title Sheet**: The title sheet should include the client's name, an indication of what the RFP will be used for, and the deadline for submitting responses.
- **Introduction**: The introduction briefly describes the project for which a consultant will be hired. It should provide a concise background or history of the project and describe its major components.
- **Objectives**: Define the objectives and purposes of the project as specifically as possible.
- **Scope of Services**: Identify the specific tasks that must be performed in order to achieve your stated objectives. Once the consultant is hired, the scope of services becomes the work guidelines.

The scope of services should describe the parties involved, phasing expenses (if any) to be incurred, and the time schedule for completion of the work. It should clearly describe the relationship of the consultant's work to the project, who will use the work that the consultant provides, the specific audience to be addressed, and, in particular, the purpose of the consultant's work. The scope should clearly identify the client, including a brief account of the client's purpose, general scope of activity, and specific role in the project.

CONSULTANT RESPONSES

The consultant's response to the RFP should include the following:

Cover Letter

This should be a very brief introduction to the project. It should act only as an introduction to the more in-depth sections discussed later in the proposal.

Introduction/Summary of Work

The most salient features of the proposal should be addressed in this section. The introduction or summary should cover all the major areas that the consultant will cover in his/her proposal.

Scope of Services

The scope of services is where the consultant's proposal should address the RFP in detail. The scope of services may include such items as maps; raw data; brief market or planning analysis; implementing strategies; or preliminary drawings, designs, or sketches. The scope of services should include a plan describing the consultant's approach to meeting each of the needs outlined in the RFP.

Proposed Timetable and Phasing

This section should outline all work tasks and approximate completion dates. The timetable should include at least one mid-project review.

Fee and Manning Schedule

The fee and manning schedule describes employee and payment commitments that the consultant will need to make in order to complete the specified work. The consultant can break down expenses by employee at their respective salary levels or by phases on a lump sum payment basis. The fee and manning schedule should state a maximum price for conducting the specified work.

If the consultant chooses to be paid on a lump sum basis, it is suggested that the client make the bulk of the payment at the end of the project, after the work has been satisfactorily completed. If the consultant will be paid based upon hourly work, you should require time sheets to back up invoices.

Qualifications

The consultant should include a brief summary of any other project that he/she has completed which is similar to the project addressed by the RFP. The consultant should provide names, positions, addresses, and phone numbers for references and past clients.

Project Staffing

The consultant should include a list of key personnel that will be involved in the specified work, their resumes, and a description of their relevant experience. If applicable, anticipated sub-contractors should also be listed and their resumes included.

Final Products or Publications

The consultant's proposal should outline the specific data that will be included in the final study. This could include a listing of charts, graphs, maps, strategies, and/or a description of the final report. These data should correspond directly to the products and deliverables specified in the RFP.