

## How to Write an RFP

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**When a school or district defines a crucial need requiring the products or services of a vendor, the first step is to create and distribute a Request for Proposal (RFP).**

An RFP is a document that comprehensively describes a project's or program's specific needs and expectations with the intent of soliciting proposed solutions from qualified vendors. Its level of detail is determined by the scope of your project. It might name specific products or services needed, or simply outline the intended use of a certain technology and whether there are needs required for its implementation.

A good RFP—one that is concise, well-written, well-conceived, and distributed appropriately—will attract good vendors: those that are the best fit for your school or district and that can fulfill the needs of your intended project or program. This connects your school with high-quality partners and consultants. A poorly crafted RFP can, conversely, attract unsuitable vendors for your project or program through loose definitions, ambiguous requirements and/or sloppy terms or prevent qualified candidates from bidding properly.

The RFP document should detail every aspect of the proposed requirement, and what exactly is expected of a potential vendor in fulfilling those requirements. Vendors will respond with bids based on their understanding of the requirements. Your evaluation team will pore over these bids and either winnow the responses and invite your “short-list” to deliver presentations, or a winning vendor will simply be selected.

Every RFP will be different based on the defined requirements and the specific needs of your school or district. Many RFPs focus on price, while others are more concerned with other issues such as the quality of the deliverable, ability to meet a timeline, the vendor's location, or any professional development offered. Most every RFP, however, needs to include certain elements, such as a specific date and time that vendors must submit their bid, for example, a late bid does not bode well for the timeliness of the vendor.

Many schools can only dive so deep into technical specifications, which is fine as long as you can communicate what, exactly, you are looking to achieve with the required product or service. A vendor needs, above all, to understand how their solutions would fit into the school's processes. Including performance-based specifications focusing on intended work results rather than how those results are specifically achieved is preferred, allowing a vendor to propose a solution that will be relevant to the school's infrastructure. Trying to be overly technical without a thorough knowledge of the technology involved will do more harm than good.

Selecting an appropriate vendor is an urgent task that could affect your school or district for years to come. So it is vital to make the wisest choice possible.

The process of formalizing, developing, and issuing an RFP is as valuable as it is challenging. It forces you to define, organize, detail, and document your requirements and expectations while providing a framework for evaluating potential vendors. When the requirements are clearly articulated, the drafting process becomes relatively straightforward.

The RFP process itself is an iterative one. It's important to come up with sharp questions that elicit the information you need in a way that can be properly evaluated when bids are received. The struggle to form these questions is an exercise in truly understanding the problem being posed and the possible products or services required. The more explicit the definition of your requirements, the more relevant the bid. Try to state your challenge and your expectation of the vendor as concisely as possible. The more forethought you put into your RFP, the more likely you'll find a vendor that will satisfactorily meet your requirements. Vendors will likely return with questions you've never considered, which will only strengthen your definition and understanding of your needs.

## **The RFP should contain the following sections:**

### **Submission Details**

These include key deadlines and the contact information for your school and whom to contact for any questions or clarifications.

### **Introduction and Executive Summary**

This is where you explain the reason behind the RFP. You'll want to briefly introduce your school, the product or service you seek, the requirements for this product or service, and a summary of key points and due dates. It's best if you write this section after the entire document is finished.

### **Background**

Give a brief overview of your school, students, culture, and community.

Don't assume the vendors know who you are or what you do, even if they have experience with the education sector. Provide enough information so vendors can decide whether or not they can respond to your RFP. These items could include:

- Background on the student population
- Outline of the content or learning objectives to be covered
- Samples of any existing subject matter or description of available subject matter expertise
- Description of the delivery technology or types of media to be used

## Detailed Specifications and Requirements

This is the “meat” of your RFP and is generally the lengthiest and most important, usually requiring the most time, as it describes the characteristics that define a successful solution. This section will contain the qualitative measures and requirements that will drive the vendor selection process. Be sure to specify exactly what you need, not necessarily how that is accomplished (unless that is essential). In addition to the scope of work, don’t forget to include a request for any training or professional development needs a new system or process might require—both at the onset of implementation and ongoing—so that your school or district maximizes the full benefit of the proposed solution.

Be wary of posing open-ended questions, as the answers they inspire will be harder to evaluate and score later when responses are returned. Also be sure that you:

- Define your audience;
- List required and desired features;
- Note any system integration needs; and
- Indicate any preferred tools or systems.

## Assumptions & Constraints

In this section, describe what you know about the service or product you seek, and any requirements you have for any vendor that might respond. This should include any key assumptions and/or constraints you have made. Try to provide as much detail as you can, putting yourself in the position of a potential vendor encountering your needs and challenges for the first time. The more information and detail you provide, the more qualified vendors you are likely to attract.

## Terms and Conditions

Any terms and conditions must be captured thoroughly in order for the vendor to respond fairly. These could range from contract length and financing options to warranties and delivery penalties.

## Selection Criteria

The final section should be an overview of the selection criteria that you’ll be using to select the winning vendor. You may want to create a spreadsheet that awards each bid a certain range of points in each category and then have a team make a choice of the “best” bid from the ones with the top three scores.

## Submission Guidelines and Schedules

Describe how and to whom a responder should submit any requests for clarification. You want to ensure that all vendors respond in the same way and, ideally, in the same format. If there is any particular response format you require, specify it here.

The response format should identify what is required from the vendor in each section. If each vendor adheres to the correct response format, this will make a comparison of the bids easier.

For example, take the following schedule:

- Release and distribution of RFP
- Deadline for vendors to submit written questions
- Questions with written answers provided to all interested vendors
- Deadline for submitting proposals
- Finalists notified
- Finalist interviews
- Vendor selected
- Vendor signed

## Budget and Timeline

Set a realistic budget and timeline based on similar projects taken on by other schools and districts. The budget should be set on what your team thinks should be spent or what's affordable. Talking with peers will provide a realistic sense of what a project like yours might cost in terms of budget and time.

Be reasonable when you set deadlines. The more complicated your RFP, the more detailed the required response. This is also where you tell vendors how long the evaluation process will take, when they'll be notified (whether it be immediately awarding the contract or creating a short list of vendors for further evaluation), and how soon they'll have to deliver. Also provide a deadline for submission of Requests for Clarification so vendors can incorporate responses into their proposal while still meeting the final deadline. Vendors should not be allowed to directly call your school or district contact to avoid giving one vendor a competitive advantage over another.

Vendors should be given a few weeks to complete their proposals. The best companies respond with thoughtful proposals while busy with existing clients; vendors more likely to respond quickly tend to be desperate or overstaffed. The more detailed, well thought-out proposal will be worth waiting for. If the timeline defined in the RFP is too short, responses may be rushed and vendors may be guessing at the complexity of the project, rather than fully understanding it. This will lead to inaccurate bids and a wasted process.

Describe the fee structure; how your school or district should be charged; and how post-deployment maintenance, support, and upgrades will be handled.

## Detailed Requests for Information, Pricing, and Proposals

In this final section, you will make your actual requests for proposals, pricing, and descriptions of how a vendor might provide a solution. Be sure to request general information about the vendor (core competencies, experience with education, market differentiators, etc.).

Also ask for any relevant experience providing similar services and a list of the vendor's comparable clients including contact name, telephone number, website location, services provided, and length of service. Ask for sample deliverables from past projects of similar size and scope.

Also, have vendors list the proposed project team and short biographies of each team member.

## Decide Who to Send the RFP to

While developing your RFP, you should be simultaneously finalizing your list of possible vendor candidates. When creating your pool of vendors, assume that several may decline to respond outright, while others will immediately emerge as inappropriate fits. You should then use the remaining responses to select three serious candidates with whom to enter into more detailed discussions and negotiations. Don't limit your list to only large or established vendors, as you may receive better ideas and pricing from smaller, more engaged vendors.

Most RFPs are mailed, but they can also be sent via email or posted on a website.