

# REQUEST FOR PROPOSAL TEMPLATE

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Click [here](#) to download a Microsoft Word 6.0 version of the Request for Proposal Template.

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## Instructions For Use

1. The Request for Proposal (RFP) is your "official" statement to vendors about the services you require. Vendors typically try to respond, point by point, to your RFP when they make their proposals. Therefore, the RFP "leads" vendors by focusing their attention on certain issues. In addition, it shapes their first impressions of your training development group and the project to be completed. Most importantly, the RFP is the foundation upon which the vendor's relationship with you is built.
  2. For these reasons, the RFP must be carefully crafted and reviewed before distributing it to vendors.
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## Request for Proposal Template

The typical RFP includes the following sections:

### I. The General Training Goals

This section includes the general business goals which are met by the new product or process on which the training will be based. In addition, it describes the key components of the new product or process (how it works) and compares these to existing products or processes with which vendors may be familiar.

### II. The Target Audiences

This includes brief summaries of the jobs of the people who are to be trained. Both primary and secondary audiences, if any, should be described. Include information on how their responsibilities will change as a result of the introduction of the new product or process. Include also numbers of people to be trained, by job category and geographic location.

### III. Objectives

This should describe exactly what the target audience will be required to do as a result of going through the training. Each objective should be listed.

### IV. Project Details

This section should include:

- Brief summaries of needs and task analyses, if any
- Brief summaries of content and suggested treatment, if applicable
- Description of anticipated project team organization, especially reporting relationships among your team and other players

- Description of your ultimate client
- Description of required development process and revision cycles
- Listing of expected deliverables, if appropriate
- Information on standards of quality and quantity

## **V. Constraints on Budget, Schedule, and Design**

This section should describe:

- How much money may be spent with the vendor on this project (budget boundaries)
- Specific dates for completion of milestones such as: the analysis\*, design plans, drafts, test sessions, master deliverables, and reproduced copies to the field
- Implementation plans (locations, dates, types and numbers of instructors, etc.)
- Constraints on the design such as a need to deliver the training in a self-study format, on interactive videodisc, or whatever

\*This assumes that you are requesting that the vendor complete the analysis. You might consider doing the analysis yourself.

## **VI. Resources Provided**

This section should describe the resources to be provided by you. Specifically, it should include a description of the subject matter experts, market research, technical documentation, equipment or facilities, and any other resources that will be provided to the vendor during the development process.

## **VII. Criteria for Evaluating Success of the Training**

This is a statement of specifically how the completed training will be judged by you and/or your client to be successful.

## **VIII. Criteria for Selecting a Vendor**

This is a list of the criteria which will be used to determine the best vendor proposal. Typical criteria include: vendor quality as evidenced in samples of work, vendor price, vendor's understanding of the product class (subject matter), track record within you, quality of proposed solution, creative use of media, and so on.

If you intend to use a weighting method (for example, assign twice as much value to creative use of media as you assign to price) then describe this weighting system to the vendor.

## **IX. Requests for Vendor Suggestion or Creativity**

This includes areas in which you are uncertain about the strategy and seek vendor recommendations. It can also include areas in which you are flexible regarding design. Vendors are often experienced professionals who are capable of conceiving several creative alternatives. However, if your RFP leaves the vendor with the impression that you have already locked in on a specific mode of instruction (self-study, driven by audio tape, for example), vendors are not likely to propose something drastically different. After all, they want your business!

Therefore, you should openly state those areas in which you are flexible or seek vendor recommendations.

## **X. Terms and Conditions**

Attach blank contract or spell out special conditions/requirements that vendors must meet.

## **TEMPLATE**

Your Request for Proposal should contain all the parts listed below. Check off those which are actually present:

**I.The General Training Goals**

**II.The Target Audiences**

**III.Objectives**

**IV.Project Details**

- Needs/Task Analysis Summary
- Content/Treatment Summary
- Team Organization
- Your Client
- Required Development Process
- Expected Deliverables
- Quality/Quantity Standards

**V.Constraints on Budget, Schedule, Design**

- Budget Boundaries
- Milestones Dates
- Implementation Plans
- Constraints on Design

**VI.Resources Provided**

**VII.Criteria for Evaluating Success of the Training**

**VIII. Criteria for Selecting a Vendor**

**IX.Requests for Vendor Suggestions/Creativity**

**X.Terms and Conditions**

This page is presented by the

[Center for Education Integrating Science, Mathematics and Computing \(CEISMC\)](#)

at Georgia Tech's College of Sciences.

## How to write a professional RFP

### Information Gathering

It is highly recommended that you to read the suggestions below in order to write a proper and successful RFP.

1. Seems obvious but use a formal letterhead and do not handwrite your RFP. Use [templates and samples](#) provided in your FREE RFP Toolkit, 2010 Edition to create your own professional RFP document. Indeed, using an a template and sample of an RFP will save you time.
- 2.
3. Identify all the **key common sections of an RFP** you should include by simply answering each and any of the questions Why? Who? What? How? and When? as shown below:
4.
  - a. **WHY?**
  - b. Why does your organization need to buy a new solution?

- c. Answering this question allows you to create the section called ***Statement of Purpose***.
- d.
- e. **WHO?**
- f. Provide a brief description of your organization.
- g. This information will become the ***Background information***.
- h.
- i. **WHAT?**
- j. What is the nature of your project?
- k. What are the needs?
- l. What are the expected outcomes?
- m. Answering these questions allows you to complete the following sections:
  - ***Scope of Work***
  - ***Outcome and Performance Standards***
  - ***Deliverables***
  -
- n. **HOW?**
- o. What is the contract?
- p. What kind of information and documents do you expect to receive from providers?
- q. How will proposals be evaluated and the best matching solution selected?
- r. This information will be used for the sections:
  - ***Term of Contract***
  - ***Payments, Incentives, and Penalties***
  - ***Contractual Terms and Conditions***
  - ***Requirements for Proposal Preparation***
  - ***Evaluation and Award Process***
  -
- s. **WHEN?**
- t. When to submit questions, proposal?
- u. When the decision will be taken?
- v. What is the whole selection process timeframe?
- w. Who are the people responsible for evaluating proposals? For taking the final decision?
- x. Answering these questions allows you to populate both sections ***Process Schedule***, and ***Points of contact for future correspondence***.

### Common Sections of an RFP

By answering the questions above, you were able to gather relevant information that will help you detail the common sections of an RFP. Here is a brief description for each and any of the common sections of your RFP:

1. ***Statement of Purpose***
2. Describe the general scope, nature, specifications, and purpose of goods, products, and services to be acquired in a manner that will enable providers to

early decide to submit either an offer or a [\*\*no-proposal letter \(or a no-bid letter\)\*\*](#).

- 3.
4. **Background Information**
5. Present a brief overview of your organization and its operations in a company profile section (use our [\*\*Free Company Profile Template\*\*](#)). Use statistics, customer demographics and psychographics. State your strengths and weaknesses honestly. Don't forget to include comprehensive information on the people who will handle future correspondence.
- 6.
7. **Scope of Work**
8. Specify the different project phases broken down into tasks, detailing their objectives, timeline, and provisions in [\*\*competitive procurement\*\*](#). Enumerate future tasks, obligations, and responsibilities for the soliciting organization, the contractor, and sub-contractors, if any, in regards to the performance of the contract (e.g., specific measurement of outcomes, acceptance criteria).
- 9.
10. **Outcome and Performance Standards**
11. Specify the outcome targets, minimal performance standards expected from the contractor, and methods for monitoring performance and process for implementing corrective actions.
- 12.
13. **Deliverables**
14. Provide a list of all products, reports, and plans that will be delivered to your organization and propose a delivery schedule.
- 15.
16. **Term of Contract**
17. Specify length, start date and end date of the contract, as well as information about payment schedule and amount, and renewal options.
- 18.
19. **Payments, Incentives, and Penalties**
20. List all the terms of payment for adequate performance. Highlight the basis for incentives for superior performance and penalties for inadequate performance or lack of compliance.
- 21.
22. **Contractual Terms and Conditions**
23. Specify length, start date and end date of the contract, as well as specific clauses for governing law, performance and default, termination and renewal, protest procedures, cost for proposal preparation, confidentiality, intellectual property, subcontracting, advertising of the contract award, compliance with laws and regulations, insurance, and indemnity.
- 24.
25. **Requirements for Proposal Preparation**
26. A consistent structure in terms of content, information, and documents types simplifies things for the people evaluating the proposals. Therefore, you should

request a particular structure for the proposal and provide an exhaustive list of documents you want to receive.

27.

**28. *Evaluation and Award Process***

29. Outline the general procedures, criteria, and relative priorities used to evaluate and rank proposals, and make the final selection decision.

30.

**31. *Process Schedule***

32. Clearly and concisely present the timeline for the steps leading to the final decision, such as the dates and deadlines for submitting the [letter of intent](#), sending questions and extension requests, attending the pre-proposal conference, withdrawing and submitting the proposal, [filing a protest](#), etc.

33.

**34. *Contacts***

35. Include a complete list of people to contact for information on the RFP, or with any other questions. Incorporate their name, title, responsibilities, and the various ways of contacting them into this list.

And remember:

- Do not forget to send your RFP via **certified mail**.
- Since things sometimes get a little more complicated than usual, consult a lawyer for further information before doing anything.