**Andrew Joseph Alexander's RFP**

1. **Intro/Summary:** In a single paragraph, detail why you are issuing this RFP and what you looking for. Is this a redesign or an update? Vendors will read this paragraph to make sure what you’re looking for matches their skills.
2. **Context**: Give us the 10,000-foot view that will allow us to see how this project fits into the entire organization’s workflows and goals. Why you want to take on this project is likely just as important as what you want to do.
3. **Prioritized Goals**: What business goals do you want this website to influence? To be clear, a website goal is NOT “Create a dynamic and intuitive website that will engage and excite our users.” Any design agency that does their due diligence will create a website that is intuitive and engaging. A goal is also not what you want the website to do (site functionality comes later). Instead, focus on your desired outcomes from this project. These should be [SMART goals](http://www.hr.virginia.edu/uploads/documents/media/Writing_SMART_Goals.pdf), such as:
   * Increase customer leads generated by the website from 1,500/month to 2,500/month by June 30, 2017
   * Increase site visits by 50% (1,000/month to 1,500 per month) for our new product launch by September 30, 2018
   * Drive $250,000 in donations in support of our capital campaign by end of year
4. **Project Team**: Include the names and titles of all people who will be involved in this project; specifically, whose approval will be needed at each step. This helps the agency draft an appropriate communication plan for the project that will make everyone’s job easier.
5. **Users**: Who are you trying to reach with your website? Include not only their demographic information, but also their problems that visiting your website can potentially resolve. Agencies will typically evolve these users into [user personas](http://www.usability.gov/how-to-and-tools/methods/personas.html), which will be used to craft a content strategy and custom web experiences.
6. **RFP Timeline**: Use this section to tell agencies when they need to send you their responses. Include when they’ll be hearing back if they’re a finalist and timing for follow-up meetings (more on that later). Finally, let everyone know when you expect to make a decision.
7. **Project Timeline**: Let everyone know at the beginning when you want the project to be complete and if there’s something that is driving that date, such as a product launch or event.
8. **Budget**: Many clients are hesitant to provide a budget at the outset. However, sharing this information at the outset will help agencies provide much better recommendations and will save everyone time. Agencies that are way outside your price point can politely excuse themselves, while vendors that are a good fit have freedom to suggest creative ways to achieve more of your goals. If you don’t know your budget, you probably aren’t ready to send out a website redesign RFP. Also, if you have a payment schedule or fiscal year limitations, this would be a great time to disclose those.
9. **Existing Website Info**: Everyone knows your current website isn’t perfect (that’s why you’re writing a website redesign RFP). But use this section to explain what elements *are* working and what your biggest pain points are.
10. **Functionality Requirements**: Detail all the functionality that you’ll need for your new website, being specific as possible. This list can include what the website should *do* as well as key content types. Some functionality examples could include:
    * Responsive layout
    * Ability to edit key pages through a content management system
    * Events calendar with registration system
    * Display custom content based on user’s web browsing history
    * Interactive map of office locations
11. **Integrations/Technology Requirements**: List out and detail any functionality that is essential to this project being a success. Does the site need to be built in a specific CMS like WordPress or Drupal? Why? Is there a third-party system like Salesforce or Blackbaud that needs to be integrated to your site? How are you using them? Are you hosting the site, or do you need external hosting?
12. **Proposal Requirements**: Now that you’ve bared *your* soul, this is where you can ask your potential vendors everything you need to know in order to make an informed decision. The more specific your [website redesign questions](http://www.ecityinteractive.com/blog/best-and-worst-questions-to-ask-in-a-website-redesign-rfp/) are, the easier it will be for you to compare vendors’ answers when you start getting responses.

### What Are the Parts of a Proposal?

There are several parts of a good proposal that you should always have. One of the best things to do is to create a proposal template that you can then customize for the projects you are trying to land.

A design proposal should include:

* **Your company name and logo -** This is an official document coming from your company. You should treat it as such by including your company logo and name at the top of the proposal. This makes it easy for the prospective client to remember who you are. For multi-page proposals, it’s a good idea to include your company name and possibly a smaller sized logo in the header or footer of every page after the first one as well.
* **Your contact information -** Your company contact information is vitally important as well. At the bare minimum, you should include an email address. But having a phone number and mailing address are also a good idea, as it makes your business look more professional. Like the company name and logo, you should include your email address or phone number in the [header or footer](https://www.thoughtco.com/make-first-page-header-footer-different-3540358) of every subsequent page after the first so that clients can contact you immediately with any questions.
* **Client’s name and contact information -** Every proposal should be customized with the potential client’s name and contact information. If you have the full name of a person at that company, it’s a good idea to include that here, in a similar format to a business letter. This tells the client that you take them seriously and will treat their website with respect.
* **Confidentiality statement -** Many clients will expect you to sign a confidentiality agreement before working on their site, stating that you will not use their site design in any other work. But you should also include that in your proposal. You need to make sure that the prospective client understands that the content in this proposal is provided to them for their evaluation, but that until a contract is signed, all work described or provided in the proposal is your property. Here is an example of a confidentiality statement:

This proposal and any files transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. This proposal contains confidential information and is intended only for the individual or company named. If you are not the named addressee, you should not disseminate, distribute, or copy this proposal. All contents of this proposal are the property of [YOUR COMPANY NAME]. If you are not the intended recipient, you are notified that disclosing, copying, distributing, or taking any action in reliance on the contents of this information is strictly prohibited.

* **Description of your company -** You should include a short paragraph describing your company and what types of services you typically provide. Think of this as a short marketing statement explaining why your company would be best for this project.
* **Goals of the project -** This is the meat of the proposal. You should be as explicit and clear as you can, detailing exactly what you will deliver to the client. If you are answering an RFP, you should address everything mentioned in that RFP. You should not include actual examples of what you’ll build for them, but you should include what technology you propose to use, how many pages you plan to build, and what type of content you will need from them in order to complete the goals.
* **Project phases -** All projects have specific phases they go through in order to be successful. In your proposal, you should indicate what phases you will be handling and what will be expected of you and the client during each phase. Some typical web design project phases include:
  + data collection
  + design
  + development
  + testing
  + delivery
  + launch
  + maintenance
* **Timeline -** This answers the question “how long will this take?” but your timeline or schedule should do more than that. You should indicate how long each phase of the project will take and what deliverables there will be for both you and your client. Remember that when you’re building a website, you need content such as text and images from the client before you can finish. In fact, many projects stall simply because the client doesn’t return images or content in a timely fashion. Another aspect of the timeline you should include is how long this proposal is good for. You don’t want potential clients showing up, demanding that you honor a proposal that you wrote five years ago when your hourly rate was much lower. The key to this section is to be as clear as possible about how long things will take and when things are due. If you anticipate a long negotiation, you can state it in days rather than give specific dates, i.e. "data collection will take 5 days to complete after receipt of the signed contract."
* **Fees -** Here is where you provide the client with how much the work in this proposal will [cost](https://www.thoughtco.com/how-much-should-web-design-cost-3466369). You can charge a flat fee or an hourly rate. If you charge a flat fee, especially of more than $1000, you should include a breakdown of what the fees cover, i.e. "50% covers the design and development phase, data collection is 20% and the rest of the fees cover testing, delivery, and launch, with maintenance covered in a separate agreement." If you charge an hourly rate, you should indicate an estimate of how many hours each phase will take and the deviation potential, i.e. "data collection will take 10 hours +/- 2." You should also indicate how overages will be covered—will you keep working and then discuss charges?; stop working and ask for approval to continue?; continue working at a reduced hourly rate? The key here is to be as clear as possible.
* **Signatures -** Even if you aren’t going to use this proposal as a contract, you should include your signature and date at the bottom. This indicates that the proposal is binding.

While it's recommended that you use all of the above parts in a proposal, you can pick and choose the ones that are most useful to your business. And you can always add additional sections. The idea is to be clear so that the client wants to pick you to do their design work.

### Contract and Pricing Hints

While a proposal is not a contract, many of the same issues come up when writing a proposal. And remember that a contract is a very important part of freelancing. In fact, if you had to choose between writing a proposal and writing a contract, you should always choose the contract.