



Guide to Writing an Effective RFP

An RFP (Request for Proposals) is a procurement method used to select a vendor based on best value rather than price being the only differentiating factor. RFPs can be used when you have a desired outcome, but you'd like vendors to propose the best method to achieve that desired outcome through a combination of factors such as technical ability, experience, quality of service, price, and methodology. Once your department has secured funding approval for a new service or goods to purchase, you can start the planning process for conducting an RFP.

Planning

First, identify which internal team members have a role to play or would be helpful to include in each stage of the RFP process, from early planning and research through contract execution. These individuals might include program and procurement staff, department/agency leadership, managers, end-users of the service or product, legal or finance teams, and staff who have procured similar services or goods in the past. This will enrich the final content of your RFP and help you align with leadership's priorities and contract outcomes. Additionally, an evaluation team of a recommended 3 or 5 members should be selected to evaluate the proposals when they are submitted.

Next, you should develop a project plan. This would include all the major steps that need to take place before Tulane executes a contract with the successful proposer. A timeline or work plan helps to hold all members of your team accountable. The timeline should be reasonable for internal staff and proposers. The quality of proposals you receive will be much higher if you give proposers sufficient time to prepare thoughtful responses.

Sample Timeline Planner:

PROJECT TIMELINE		
Activity	Target date or date range	Notes (e.g., who will be responsible, what this activity will include, what could potentially delay this activity)
Basic project organization completed (budget identified, timeline finished, & project team created)		
Information gathering for scope of work completed		

RFP draft completed		
RFP review by decision makers		
RFP release date		
Deadline for proposer questions (responses issued by addendum)		
RFP responses due	(at least 4-6 weeks after RFP release)	
Evaluation committee first-round scoring completed		
Interviews/demos held (optional)		
Awardee(s) selection date		
Contract negotiations and drafting		
Contract approval process		
Contract executed		

Information Gathering

Once your timeline and project team are established, you are ready to gather information to create your RFP. As part of your information-gathering process, you will conduct research and speak to stakeholders:

- End-users or Program Recipients
- Front-line Staff and Supervisors
- Administrators in other departments: auditors, inspectors or finance staff who may have previously explored the cost, effectiveness, performance, or compliance of vendors previously delivering services.
- Vendors/Providers
- Subject Matter Experts
- Internet Research

Writing the RFP

Now that you understand your needs, it is time to start drafting your RFP.

Cover Letter

A cover letter introduces the RFP and summarizes the key details. It includes the project title, issuance date, due date, and contact information.

Project Overview

The project overview section gives a general introduction to the project. It outlines the project's primary objectives and the problem it aims to solve. This section helps vendors understand the project's broad context and its overall significance to Tulane.

Background

The background tells some history of the organization/department and any details that the proposer would need to see how you reached this point of needing the desired services. This section could include details such as the size/square footage, number of end users, existing configuration, and other supporting details related to this project.

Scope of Work

The scope of work defines the project's specific tasks and deliverables. It details the work, including timelines, milestones, and responsibilities. Precise specifications in this section ensure vendors understand their roles and what is expected from them. Detailed project descriptions are essential. Detailed descriptions enable vendors to provide accurate and comprehensive proposals.

Proposal Requirements

Proposal requirements outline what vendors should include in their submissions. They specify documentation, format guidelines, deadlines, any mandatory data points, pre-proposal conference information, if offered, and how to submit their proposals. This section ensures consistency across proposals, making it easier to compare and evaluate responses.

Evaluation Criteria

The evaluation criteria explain how the proposals will be assessed and detail the specific metrics or qualifications the selection committee will use. In addition to written proposals, departments can require oral/visual presentations from vendors to contribute to their overall score. Typical criteria include experience, cost, technical capabilities, and past performance. Clear criteria guide vendors on what aspects to emphasize and help ensure objective evaluation. Please specify how you would

like the vendor to submit their costs (i.e. lump sum, hourly rates X 1000 estimated hours, lump sum services plus travel, price per project milestone, etc.) Providing a cost template makes it easier to compare costs against each other so that you can score costs appropriately.

Sample Evaluation Criteria:

EVAULATION CRITERIA	
<i>Technical Factors:</i>	<i>Requested Information from Respondents:</i>
<p>ORGANIZATIONAL CAPACITY AND EXPERIENCE (XX%) Based upon the respondent's overall capacity and experience that is relevant to the work in this RFP, and demonstrated ability to provide successful program management, technical and data expertise, partnership management, and fundraising efforts during the term of the contract. Tulane understands that an organization might need to hire for additional capacity and may give full credit to responses that present a thoughtful, realistic plan about how additional resources and expertise will be hired or developed.</p>	<p>Five questions about the proposer's capacity and experience in relevant topic areas. Overall category percentage can be broken down into smaller percentages for each question within that category.</p>
<p>METHOD OF APPROACH (XX%) Referring to the soundness of the proposer's planned approach to the project, including ability to address current and future challenges, planned approach to working in partnership with Tulane, evidence of organizational buy-in, and proposed staffing approach.</p>	<p>Four questions about the proposer's approach, ability to tackle challenges outlined in the RFP, and plan to work collaboratively with Tulane. Overall category percentage can be broken down into smaller percentages for each question within that category.</p>
<p>EQUITY AND ECONOMIC MOBILITY APPROACH (XX%) Based upon the respondent's understanding and planned approach to address equity and economic mobility in program design, execution and administration.</p>	<p>Three questions assessing the proposer's ability to consider equity in their efforts and understand the needs of the target population. Overall category percentage can be broken down into smaller percentages for each question within that category</p>

BUDGET AND RESOURCE ALLOCATION (XX%)

Referring to the respondent's planned approach to allocate Tulane's financial resources and ability to supplement those resources with in-kind or outside support. Tulane reserves the right to negotiate a final project price and scope in accordance with Tulane's budget allocation and internal policies.

Proposers completed a cost proposal outlining their plan to allocate financial resources and supplement with outside or in-kind support. ***The recommendation is to request that cost proposals be submitted separately so that Tulane can easily exclude cost from review by the evaluators before evaluating the other factors.**

Legal & Financial Conditions

RFPs must include critical legal and financial conditions. Legal conditions might cover confidentiality agreements, intellectual property rights, grant requirements, and dispute resolution. Economic conditions should address budget constraints, payment schedules, net payment and contract terms. Including these elements ensures compliance and secures the project's financial and legal integrity.

You can use payment and contract structure to minimize risk and incentivize performance. Examples include withholding payment until key deliverables are completed, collecting performance metrics throughout the project, structuring the payments (lump sum upon completion, paying for time and materials, or paying by performance outcomes). The pricing structure should be determined upfront, so vendors know how to submit their cost proposals.

Please contact Tulane Contract Management or General Counsel for review and/or suggestions for legal terms and conditions and conditions. Please contact Tulane Risk Management for the suggested insurance requirements for this type of project.

Attachments, Exhibits, and Required Forms

This section includes any special forms you'd like the vendor to review and/or submit with their proposals (floor plans, detailed specifications, maps, sample contract template, the cost proposal form specifying how cost should be submitted).

Before RFP Release

Advertisement

While we encourage full and open competition, the RFP should be issued to **at least** three potential proposers. An RFP can be advertised through local, regional, and national periodicals, social media, professional organizations, posting to internal web pages, industry specific contact channels, direct email lists, and any other University-approved methods of communication.

Source List

A source list is a list of potential vendors who would be most interested in submitting a proposal in response to the RFP. The user department is usually most knowledgeable about which vendors conduct the requested services desired. Additionally, procurement staff may have a list of industry-specific vendors based on past work conducted by a vendor or from outreach efforts to find vendors on past projects. This list of vendors, with their contact information, should be compiled and used to email the RFP or a link to the RFP file(s) for their review/download. This email should also include all pertinent deadlines associated with the RFP.

After RFP is Released

Pre-Proposal Conference

The pre-proposal conference is an opportunity for prospective vendors to ask questions and hear about your goals. Pre-proposal conferences are recommended when services are complex or should be added by addendum after the RFP is released if there is a high volume of questions and uncertainty among vendors. This conference is usually attended by the project manager,

Addenda

After the RFP is issued, the RFP coordinator specified in the RFP may receive a series of questions for clarity on the RFP. Questions should be answered in the form of an addendum to the RFP and issued to all the vendors originally solicited. It is recommended that vendors submit a signed copy of each addendum with their proposal submission. This ensures that they fully understand the requirements of the project.

Silence Period

While the RFP is open for proposals (release to close date) and to maintain the integrity of the RFP, the RFP contacts should be the only parties to field questions and discuss the details of the RFP with the vendors. This ensures that information is being funneled through the same sources, which promotes consistency and fairness in the information being provided.

Evaluating the Proposals

The evaluation committee should consist of a diverse group of people with varied perspectives on the proposal. You can include stakeholders from different departments, such as project managers, finance staff, and subject matter experts, to ensure comprehensive evaluations. Each member should possess relevant expertise to assess the proposals accurately.

Use scoring rubrics and evaluation sheets to standardize proposal reviews. Scoring rubrics should include criteria like technical capability, cost, experience, methods, and alignment with project objectives. Assign numeric values to each criterion for quantifiable assessments. Evaluation sheets should have sections for scoring, comments, and overall recommendations.

It is recommended that the evaluation committee be excluded from reviewing the cost proposal submissions. This approach prevents tainting the scoring of the technical factors. Cost should be scored separately by the person coordinating the RFP.

Shortlisting

If there is a clear and apparent winner, you can move to an award recommendation after the proposals are scored. However, if you'd like to conduct a two-step evaluation, you can conduct an initial review of proposals and only advance those that met the basic requirements of the project or those that had an initial minimum score. Proposals that advance to the next stage could go on to a demo/interview stage. This stage can be used to gain clarity on what was unclear in the proposal and solidify the final scores.

Negotiations

Negotiations can be performed with the highest-ranked proposal. If an agreement cannot be reached, you can move on to the next highest-ranked proposal.

Award & Contract

After a decision is made, a Notice of Award should be sent to the selected vendor and to all participating vendors via an individual or blind carbon copy group email on Tulane letterhead and signed by a department head or delegated authority. You can elect to include a protest period for any objections to the award. If there are no objections, you can proceed with executing the contract. A PO must be issued before the services commence or goods are rendered.