A Guide to Writing a Request for Proposal

The form beginning on page 4 is to be completed by community (public/private sector interests) partners seeking the opportunity to work with student project teams from the School of Planning at the University of Waterloo. It allows the client to set out their requirements and provides a basis for students in the course to respond with proposals but in no way represents a legal obligation on behalf of either party.

1. Structure of an RFP

1.1 Key Sections of an RFP

1.2 Statement of Purpose

1.3 Background Information

1.4 Scope of Work

1.5 Outcome and Performance Standards

1.6 Deliverables

1.7 Term of Contract

1.8 Payments, Incentives, and Penalties

1.9 Contractual Terms and Conditions

1.10 Requirements for Proposal Preparation

1.11 Evaluation and Award Process

1.12 Process Schedule

1.13 Points of contact for future correspondence

Go to http://www.rfp-templates.com/RFP-Template.html for FREE RFP Documents including:

- RFP Template
- RFP Cover Letter
- Proposal Cover Letter
- Executive Summary Template
- Disqualification Letter
- Rejection Letter
- Non-Binding Letter of Intent
- Decision Matrix
- No-Bid Letter
- Protest Letter

Sole Source Protest Letter
Sole Source Justification and Approval (J&A)
Letter to Decline a Proposal
Contract Award Letter

FREE Requests for Proposals (RFP) Template Samples:

- Software RFP Template
- Process ERP RFP Template
- Discrete ERP RFP Template
- CRM RFP Template
1. Structure of an RFP

1.1 Key Sections of an RFP
You can easily identify the key sections you should include in your RFP by simply answering each and any of the following questions:

1. **Why?** Reasons why your organization needs to buy a new solution.

2. **Who?** Description of your organization

3. **What?** Nature of your project.

4. **How?**
   - Contract.
   - Information needed from suppliers.
   - Proposal evaluation criteria.
   - Contract award criteria.

5. **When?**
   - Selection process timeframe and deadlines. Persons to contact.

1.2 Statement of Purpose
Describe the extent of products and services your organization is looking for, as well as, the overall objectives of the contract.

1.3 Background Information
Present a brief overview of your organization and its operations, using 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.

1.4 Scope of Work
Enumerate the specific duties to be performed by the provider and the expected outcomes. Include a detailed listing of responsibilities, particularly when sub-contractors are involved.

1.5 Outcome and Performance Standards
Specify the outcome targets, minimal performance standards expected from the contractor, and methods for monitoring performance and process for implementing corrective actions.

1.6 Deliverables
Provide a list of all products, reports, and plans that will be delivered to your organization and propose a delivery schedule.

1.7 Term of Contract
Specify length, start date and end date of the contract, and the options for renewal.
1.8 Payments, Incentives, and Penalties
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.

1.9 Contractual Terms and Conditions
Attach standard contracting forms, certifications, and assurances. You may include requirements specific to this particular contract.

1.10 Requirements for Proposal Preparation
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.

1.11 Evaluation and Award Process
Lay down the procedures and criteria used for evaluating proposals and for making the final contract award.

1.12 Process Schedule
Clearly and concisely present the timeline for the steps leading to the final decision, such as the dates for submitting the letter of intent, sending questions, attending the pre-proposal conference, submitting the proposal, etc.

1.13 Points of contact for future correspondence
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.

Source
http://www.werc.org/assets/1/assetmanager/rfpwritingguide.pdf
Client Request for Proposal – Template

Project Title: Click here to enter text.

1.1 Introduction
This document describes work to be undertaken as part of Waterloo School of Planning course entitled Integrated Planning Project (Plan 405). It is intended to simulate real world projects with students acting as consultants and volunteers from the public and private sector taking on the part of Clients. The guide for creating an RFP is contained on the first three pages of this document.

1.2 Statement of Purpose
Click here to enter text.

1.3 Background Information
Click here to enter text.

1.4 Scope of Work
This project will begin during the first week of January, 2015 and will be completed by the end of the Winter Term, in April, 2015, a total of 12 weeks.

Click here to enter text.

1.5 Outcome and Performance Standards
Click here to enter text.

1.6 Deliverables
Click here to enter text.

1.7 Term of Contract
By the third week of January 2015 the Consultant will prepare and present their Proposal for the completion of the project to the respective Client. If the Client accepts the Proposal a Memorandum of Understanding (MOU) will be signed that will officially set out the Client/Consultant relationship within the bounds of the course. The RFP, the Proposal and the MOU will all be in standard industry format. A mid project meeting will be held in the second week of February, 2015.
1.8 Payments, Incentives, and Penalties
Click here to enter text.

1.9 Contractual Terms and Conditions
Click here to enter text.

1.10 Requirements for Proposal Preparation
To be determined.

1.11 Evaluation and Award Process
To be determined.

1.12 Process Schedule
To be determined.

1.13 Points of contact for future correspondence
Click here to enter text.