Request for Proposal Template

[PROJECT NAME OR DESCRIPTION]

[DATE]

Issued by:

[COMPANY NAME]

[COMPANY NAME] Representative:

[POC NAME]

[POC EMAIL]

[POC PHONE]

1. **Introduction & Background**

[COMPANY NAME], a [DESCRIPTION OF BUSINESS], is in need of [DESCRIPTION OF END PRODUCT] and is accepting proposals in response to this Request for Proposal (this “RFP,” or this “Request for Proposal”) in order to find a qualified source to provide [DESCRIPTION OF END PRODUCT]. Our goal with [DESCRIPTION OF END PRODUCT] is to:

1. Goal 1
2. Goal 2
3. Goal 3
4. Goal 4

The objective of this Request for Proposal is to locate a source that will provide the best overall value to [COMPANY NAME]. While price is a significant factor, other criteria will form the basis of our award decision, as more fully described in the Evaluation Factors section of this Request for Proposal below.

Pro Tip: In this Introduction & Background section, provide relevant background information on your company. What industry are you in? Who are your customers? Also, what do you need, and why? Answering these questions will only serve to help bidders as they work to develop responsive proposals in response to the RFP.

1. **Submission Guidelines & Requirements**

The following submission guidelines & requirements apply to this Request for Proposal:

1. First and foremost, only qualified individuals or firms with prior experience on projects such as this should submit proposals in response to this Request for Proposal.
2. Bidders intent on submitting a proposal should so notify the representative identified on the cover page no later than [DATE].

Pro Tip: This may be useful, since it could show how on or off the mark you are in the Request for Proposal. For instance, if you do not receive any notice, then your budget could be off, or perhaps the scope of work is unclear.

1. Bidders must list at least [NUMBER] projects that are substantially similar to this project as part of their response, including references for each. Examples of work should be provided as well.
2. A technical proposal must be provided that is not more than [NUMBER] pages. This technical proposal must provide an overview of the proposed solution as well as resumes of all key personnel performing the work. In addition, the technical proposal should provide a proposed schedule and milestones, as applicable.

Pro Tip: You may or may not choose to separate the technical and price proposal. You may opt not to provide a page limitation either. Use your judgement. The page limitation is meant to streamline review and evaluation of proposals, but if you do not have a good understanding of what is involved in the work, you may not be able to settle on an appropriate page limitation.

1. A price proposal must be provided that is not more than [NUMBER] pages. This price proposal should indicate the overall fixed price for the project as well as hourly rates and an estimated total number of hours, should [COMPANY NAME] decide to award a contract on an hourly rate basis.

Pro Tip: Pricing will vary by project. For example, you may want itemized pricing if buying materials or equipment. Additionally, you may want to see the breakout of the overall fixed price.

1. Proposals must be signed by a representative that is authorized to commit bidder’s company.
2. If you have a standard set of terms and conditions, please submit them with your proposal. All terms and conditions will be subject to negotiation.

Pro Tip: You may also opt to create an appendix which includes the set of terms and conditions each bidder is expected to bid against.

1. Proposals must be received prior to [DATE] to be considered.
2. Proposals must remain valid for a period of [NUMBER] days.

Pro Tip: Think about how long it will likely take to review, evaluate and then negotiate a contract with the successful bidder, and then add a buffer. You will want to request a validity period that will keep their prices valid for that period of time.

1. [COMPANY NAME] anticipates selecting at least two individuals or firms to have more in-depth discussions with, and will make an award to one of these “down-selected” individuals or firms.

Pro Tip: More complex projects may justify even more guidelines and requirements than above. Less complex projects may justify less guidelines and requirements. Use your judgement.

1. **Project Description**

The purpose of this project is as follows:

Pro Tip: Why do you need this project done? Are you using an outdated product now? Is you business being impacted by not having this done? Provide some details around the current state of things at your company and where you ultimately want to be.

The description of the project is as follows:

Pro Tip: Provide some general information about the project. Keep this section purpose-driven or goal-oriented. After all, you may have a number of bidders that can provide the same result using different approaches, all of which have cost implications. Ideally, you want to provide a project description that leaves the methods to the bidder.

1. **Project Scope**

Pro Tip: Where the project description provides general information, the scope section provides the more detailed requirements. This does not mean that you should tell the bidder how they should perform the work. You will still want to remain results-oriented.

The scope of the project entails Provide scope of work here. You may provide this in list or paragraph form.

The successful bidder will be responsible for Provide more on scope of work here.

The criteria set forth below should be met to achieve successful completion of the project:

1. Criteria 1
2. Criteria 2
3. Criteria 3
4. Criteria 4
5. Criteria 5

Acceptance of the work is contingent on the following acceptance criteria:

1. Criteria 1
2. Criteria 2
3. Criteria 3
4. Criteria 4
5. Criteria 5

Pro Tip: Acceptance criteria is usually for fixed-price jobs. It provides the criteria for completion of the entire project, or phases/milestones of the project. Acceptance criteria will help ensure you are getting what you paid for.

1. **RFP & Project Timelines**

The Request for Proposal timeline is as follows:

|  |  |
| --- | --- |
| Request for Proposal Issuance | [DATE] |
| Selection of Top Bidders / Notification to Unsuccessful Bidders | [DATE] |
| Start of Negotiation | [DATE] |
| Contract Award / Notification to Unsuccessful Bidders | [DATE] |

The need-date for project completion is [DATE]. Bidders may propose a date earlier or later, and will be evaluated accordingly.

1. **Budget**

[COMPANY NAME]’s budget for the project is [DOLLAR AMOUNT].

1. **Evaluation Factors**

Pro Tip: Telling bidders what they will be evaluated on will show them what you care about and result in more worthwhile proposals, which is good for everyone. In this section, tell the competitive field what you will be rating them on.

[COMPANY NAME] will rate proposals based on the following factors, with cost being the most important factor:

1. Responsiveness to the requirements set forth in this Request for Proposal
2. Relevant past performance/experience
3. Samples of work
4. Cost, including an assessment of total cost of ownership

Pro Tip: “Total cost of ownership” refers not only to the cost of the project but the cost to maintain the end product.

1. Technical expertise/experience of bidder and bidder’s staff

[COMPANY NAME] reserves the right to award to the bidder that presents the best value to [COMPANY NAME] as determined solely by [COMPANY NAME] in its absolute discretion.