



WRITING A GOOD REQUEST FOR PROPOSAL

Writing a Good Request for Proposal or "Garbage Out ... Garbage In!"

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Sending out a Request for Proposal (RFP)? Take time to do your homework and do a thorough job. Taking time early in the process can minimize time spent later on to answer questions and make an apples-to-apples comparison on which to make your selection. A good RFP can give you the data on which you can defend your choice as well as shorten the time from selection to contract signature. Good data can oftentimes mean a higher quality service for the lowest price because a clearly written scope gives little room for interpretation for the future.

You don't need a legal degree to write the RFP, but if you work for a major corporation you may want to get your legal and/or purchasing department involved so that you follow corporate protocol.

They may also have examples that you can use. If your purchasing department controls the RFP process, don't think that your job will be easy. They are not experienced in facility management and will look to you for the bulk of the RFP requirements anyway. The more RFP's you write the better you will get at it and the less time it will take for the next one. Ask other colleagues and vendors for their suggestions.

While it would take a book to outline all the specifics you would need for each and every type of RFP (architect, mover, landscape, security, janitorial), the following is a good guideline for getting started.

What you need to provide:

General Background Information

- Purpose. State briefly the reason for issuing the RFP.
- Company. Include key statistics on your firm, contact person name and phone number.
- Decision Process. Who, how, and when? You may want to develop a point system for evaluating the proposals and share these in your RFP.
- RFP Schedule. Include a period for questions, written responses, due date, interview date, award date, start date.
- Current vendor. Who provides the service today and why are you issuing the RFP.
- Disclaimers/Confidentiality. Ask legal and procurement. Prior to receiving an RFP some companies require that a confidential and/or non-disclosure statement be signed before the RFP is released to them.

Contractual Information

- Sample contract. Either provide your own Terms & Conditions or ask the respondents to supply a copy of theirs.
- Insurance Requirements. Confirm this with your risk management division or CFO.
- Signature Page. Include some certifying language that the individual signing the proposal is authorized to do so on behalf of the company.

Project Scope (The most important part!)

- Requirements. Provide plans, technical specifications, staffing levels, square footage data, headcount data ... any thing that relates to what you want bid. Be very thorough.



- Quality. Define levels of quality that you expect based on any benchmark data available.
- Pricing. Hourly? Monthly? Lump Sum? Time and Materials? Do you want pricing broken out by task? Provide a matrix that specifically corresponds to your requirements including breakdown by person and/or by phase.

Response Format:

The most important thing is that you ask that the proposal be written in a particular format and order. Create an numbered outline so that you can easily make comparisons between proposals. Create a scoring sheet based on your outline. Suggestions for what you should require from the responder:

1. Company Information
 - a. Address, phone number, Tax ID, D&B #
 - b. Contact Information (name, e-mail, phone)
 - c. Revenue
 - d. Client List (top revenue or past 12 months)
 2. Technical Proposal
 - a. Project Approach
 - b. Project Team (Resumes)
 - c. Examples from past projects
 3. Firm Capabilities to provide the services
 - a. Staff (full-time, part-time, contract by title)
 - b. Project case studies
 - c. References (name, phone number, e-mail address)
 - d. How do they address quality?
 - e. How do they address customer satisfaction?
 4. Project Staffing
 - a. Resumes
 - b. Team Structure
 5. Implementation Plan
 - a. How will they do the job?
 - b. Special skills/experience requirements
 6. Pricing (remember to require that they fill out your format)
- Now, you are ready to issue a strong RFP! Just remember to ask for the quantity of information that you are willing to read and review. And, lastly, remember "Garbage Out ... Garbage In!"