



How to write an effective RFP

Writing a clear, professional RFP will not only increase supplier uptake of your opportunity, but will also result in more, compliant responses. If suppliers find your opportunity confusing, overly prescriptive, too broad or too narrow, your organization is unlikely to receive competitive responses. You could even end up picking a supplier that doesn't meet the requirements, which can be very costly. You may also be bombarded with questions or be required to issue addenda and alternate documents, adding more work for your team.

You can start with this template for writing an RFP, and customize as needed for your specific opportunity.



1

Summarize and define the scope of the work

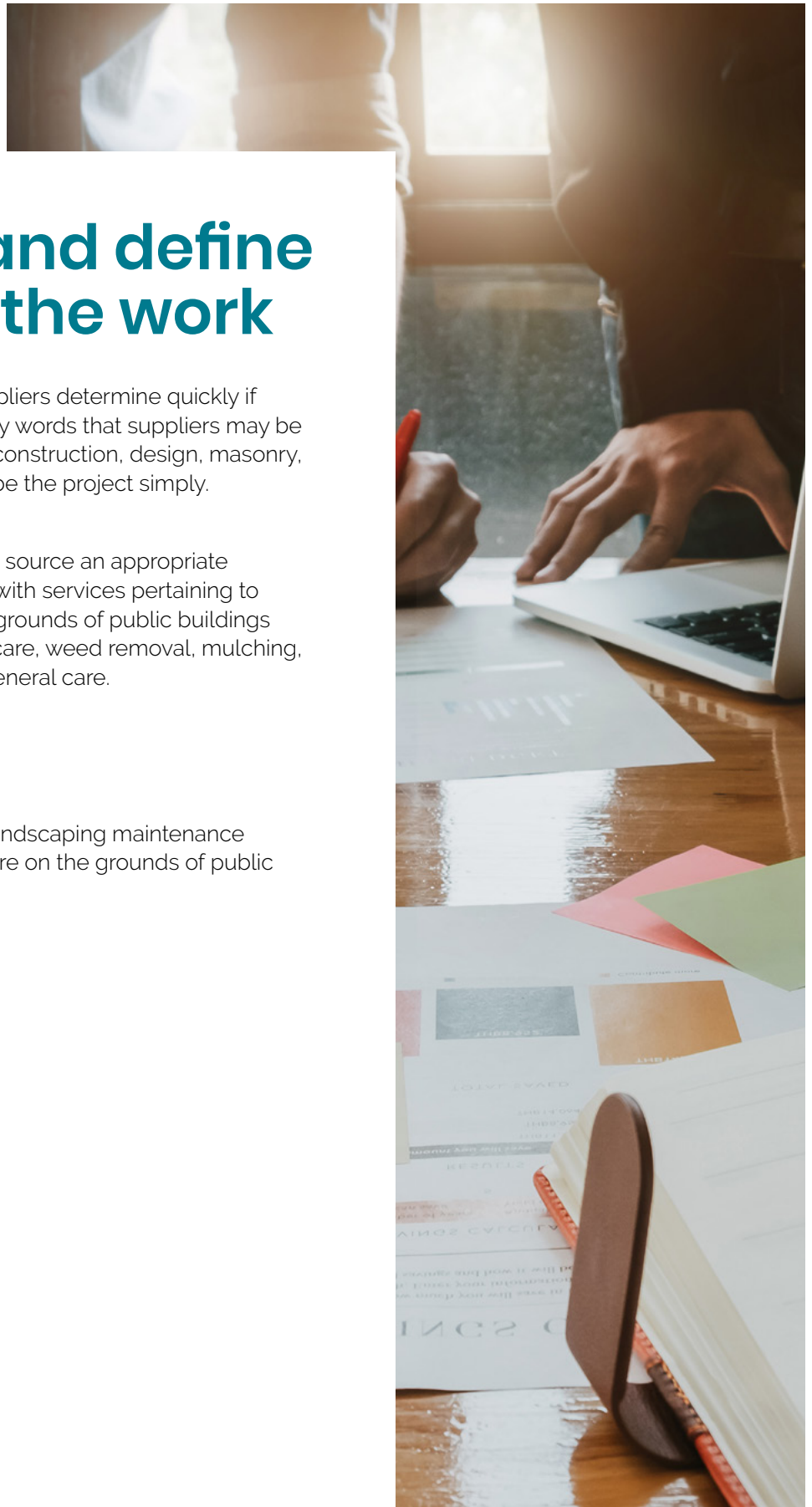
This concise summary should help suppliers determine quickly if they're interested in responding. Use key words that suppliers may be using to search for relevant work – like construction, design, masonry, vehicle, maintenance, etc. – and describe the project simply.

✗ BAD The purpose of this RFP is to source an appropriate supplier to provide the Township with services pertaining to the care and maintenance of the grounds of public buildings including but not limited to lawn care, weed removal, mulching, planting, pruning, watering and general care.

→ *Wordy, overly technical.*

✓ GOOD The Township requires a landscaping maintenance company for grass and garden care on the grounds of public buildings.

→ *Short and to the point.*



2

Give background information on your organization

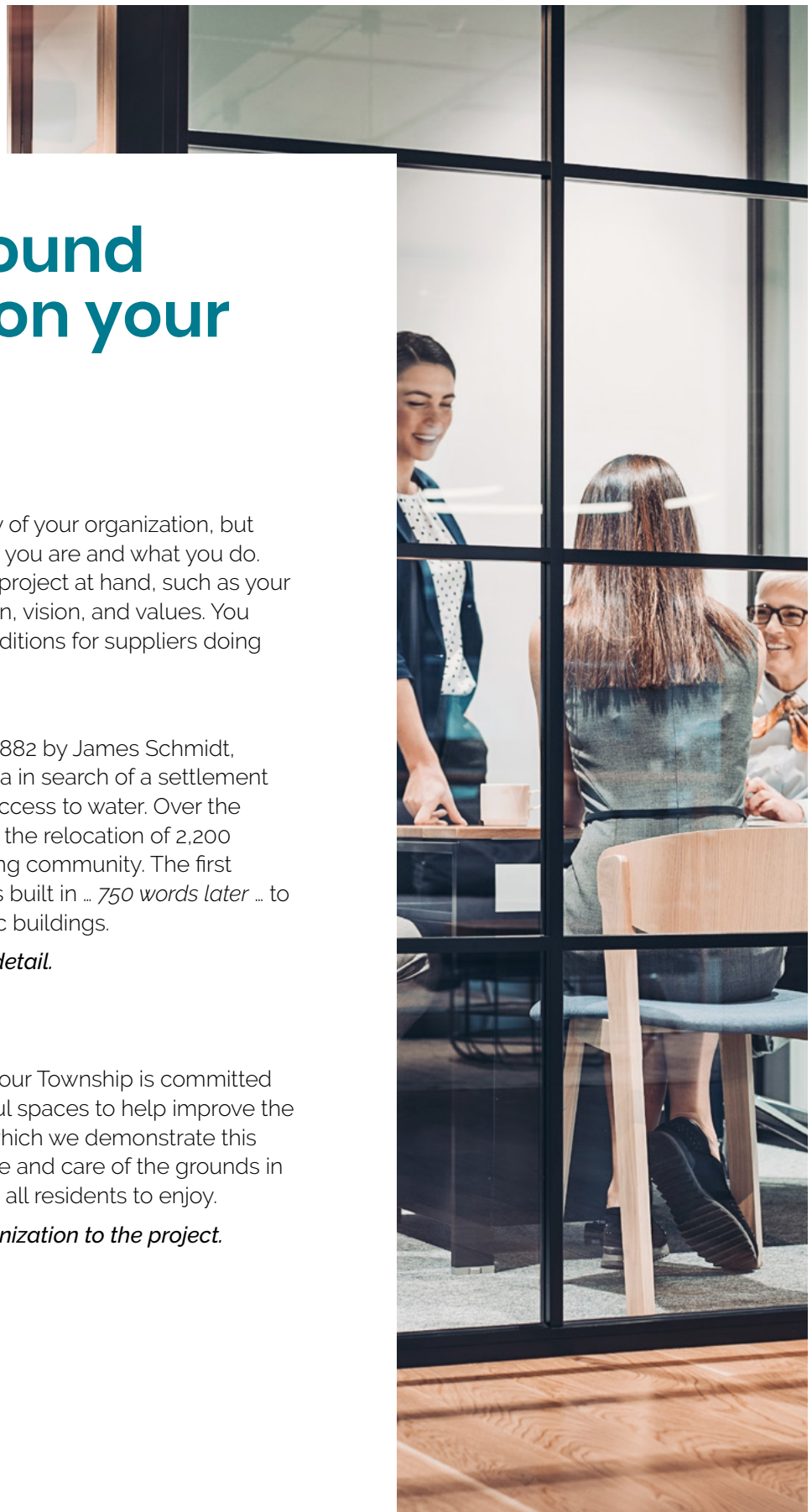
Suppliers don't need a complete history of your organization, but should have a reasonable sense of who you are and what you do. Include any details that may inform the project at hand, such as your organization's strategic direction, mission, vision, and values. You can also include general terms and conditions for suppliers doing business with your organization.

✗ BAD The Township was found in 1882 by James Schmidt, who relocated from Upper Canada in search of a settlement with a milder climate and easier access to water. Over the next 35 years, James encouraged the relocation of 2,200 settlers into what became a thriving community. The first public administration building was built in ... *750 words later* ... to maintain the grounds of our public buildings.

→ *Wordy, contains superfluous detail.*

✓ GOOD Since its founding in 1882, our Township is committed to creating functional and beautiful spaces to help improve the lives of its residents. One way in which we demonstrate this commitment is in the maintenance and care of the grounds in our public spaces, which we want all residents to enjoy.

→ *Relates the values of the organization to the project.*



3

Describe your project's background

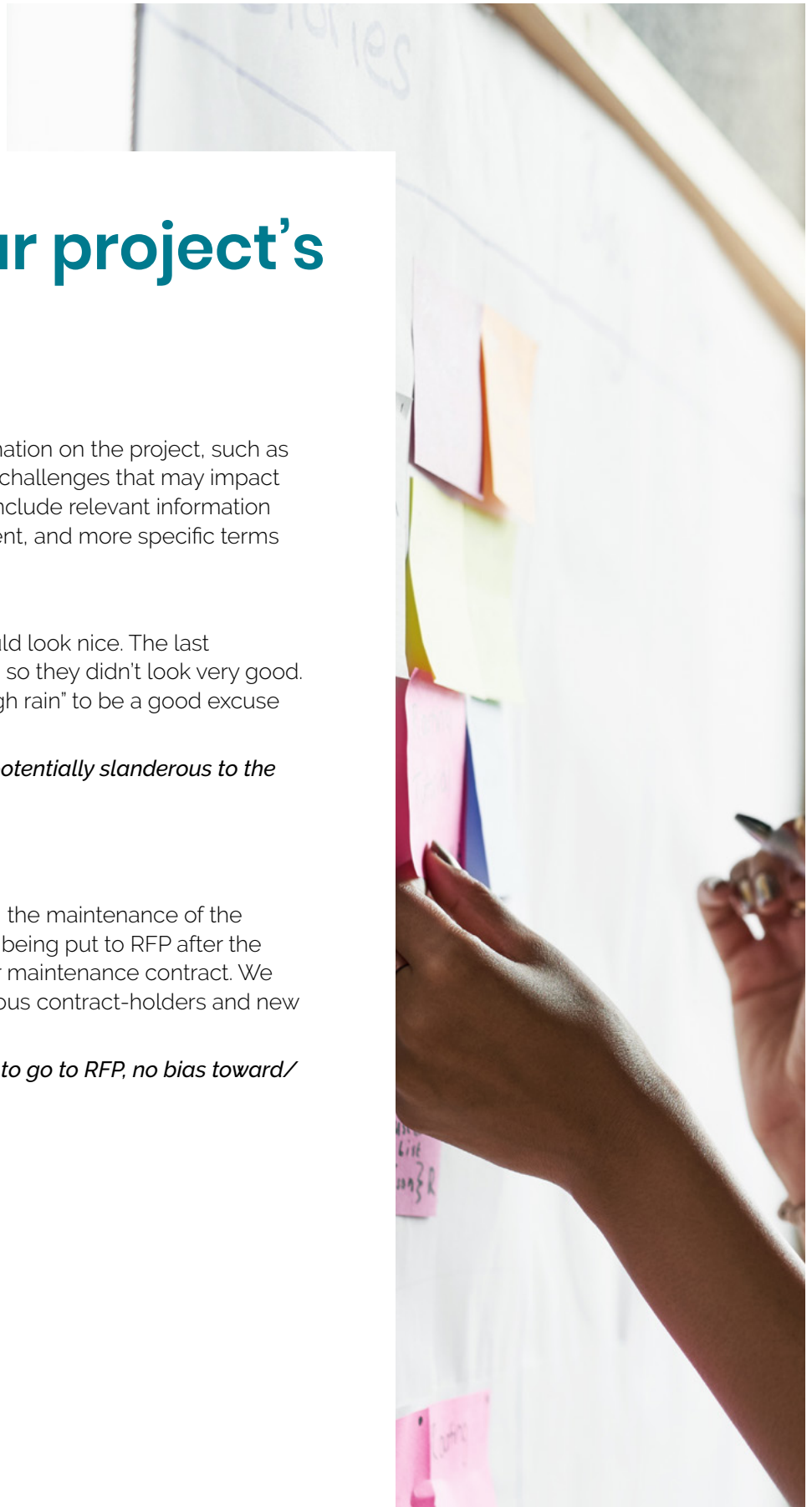
Provide any relevant background information on the project, such as how the end goals were determined or challenges that may impact the supplier's solution. This could also include relevant information about contract recurrence, the incumbent, and more specific terms and conditions for this project.

✗ BAD The gardens and lawns should look nice. The last contractor didn't show up enough so they didn't look very good. Also we don't consider "not enough rain" to be a good excuse for all the plants dying.

→ *Confrontational, aggressive, potentially slanderous to the incumbent.*

✓ GOOD Per our Township's bylaws, the maintenance of the grounds of our public buildings is being put to RFP after the completion of the previous 3-year maintenance contract. We welcome submissions from previous contract-holders and new potential suppliers.

→ *Clear, explains why they need to go to RFP, no bias toward/against incumbents.*



4

List the project requirements

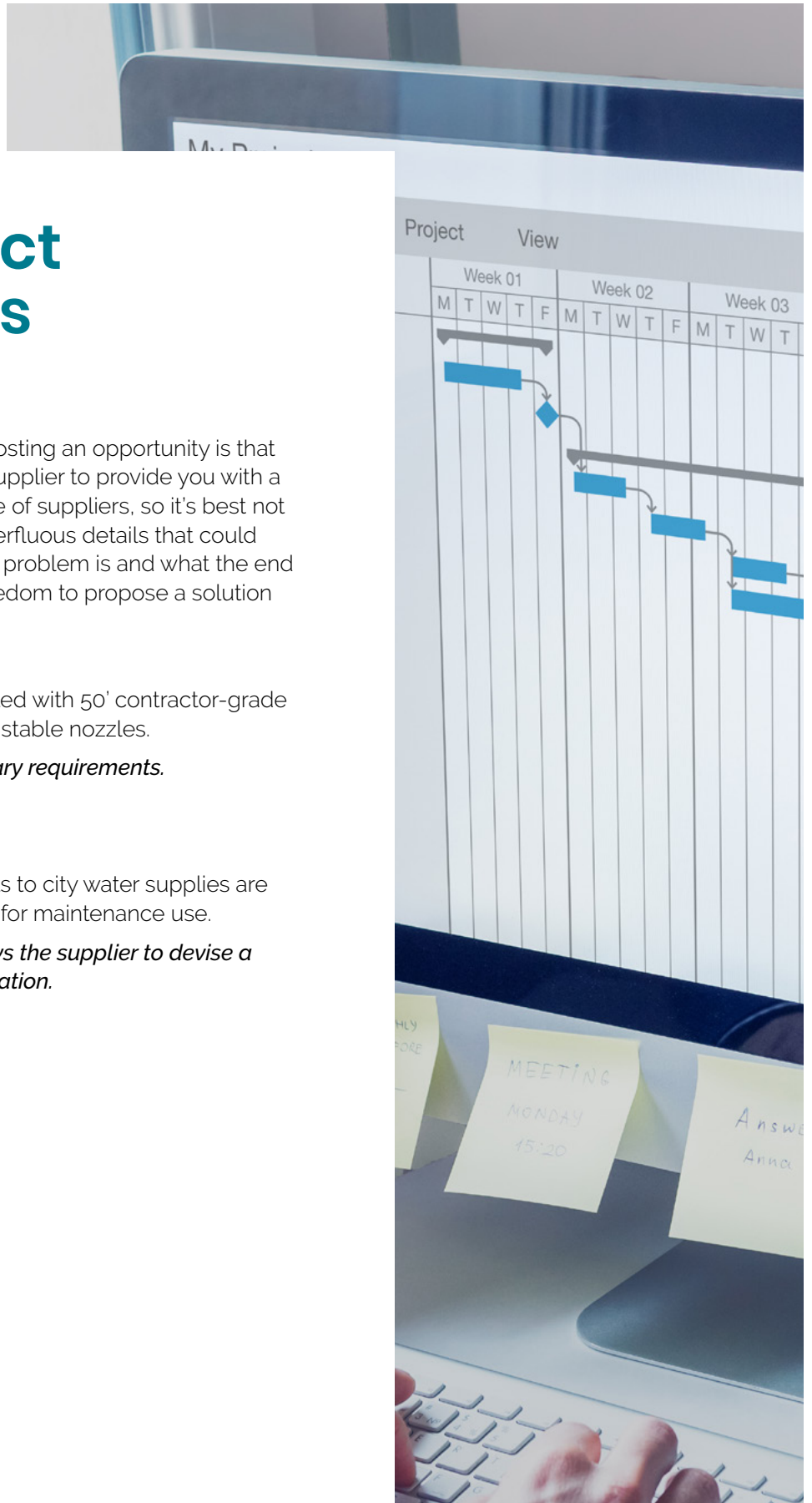
The main thing to keep in mind when posting an opportunity is that you have a problem, and are asking a supplier to provide you with a solution. You are asking for the expertise of suppliers, so it's best not to be overly prescriptive. Don't add superfluous details that could confuse suppliers. Figure out what your problem is and what the end goal will be, and allow suppliers the freedom to propose a solution that will get you there.

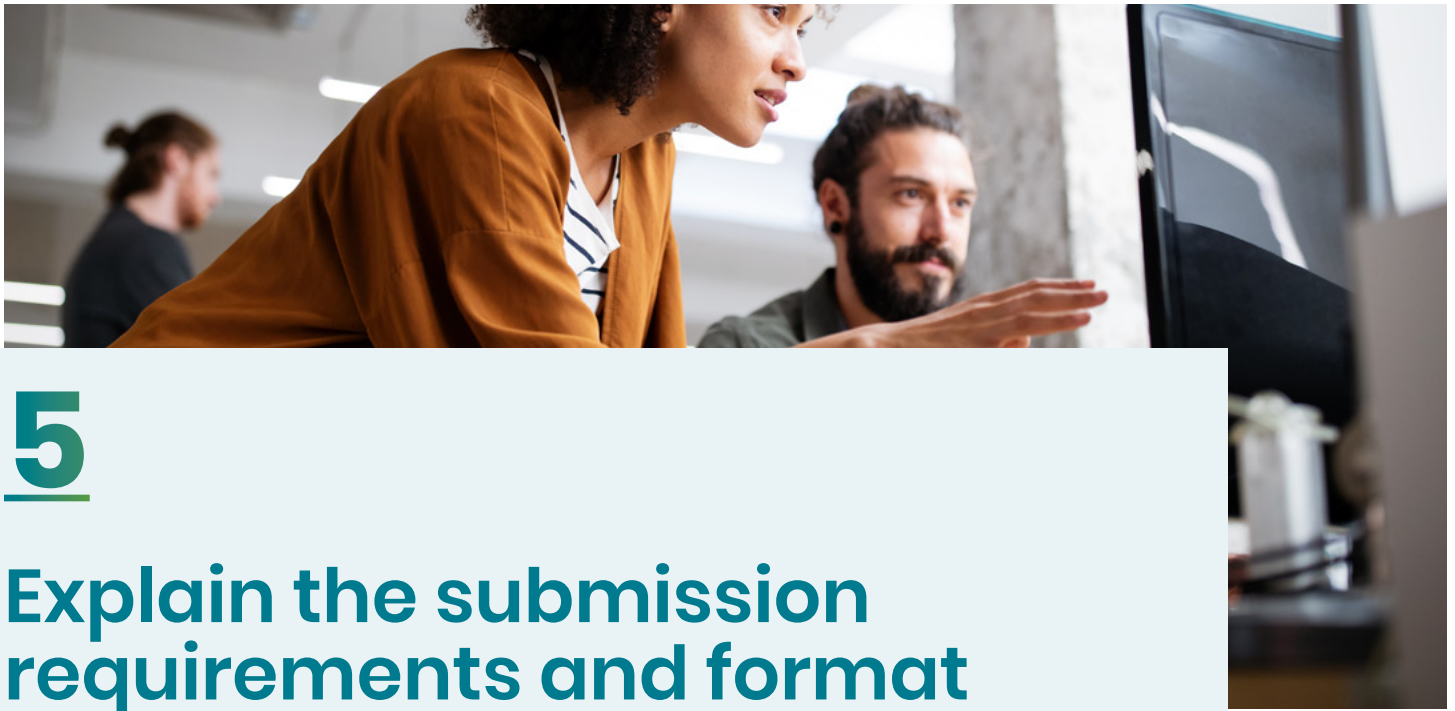
✗ BAD Watering should be completed with 50' contractor-grade green hoses using 10-setting adjustable nozzles.

→ *Overly prescriptive, unnecessary requirements.*

✓ GOOD Standard hose attachments to city water supplies are available approximately every 50' for maintenance use.

→ *Provides circumstances, allows the supplier to devise a solution with available information.*





5

Explain the submission requirements and format

Make sure the questions you're asking and the format of the information makes sense for the information being submitted. Consider the effective use of:

- Tables, e.g. for pricing – bonus points if the tables build in calculation fields, such as unit price * quantity, so there's no room for mathematical error
- Yes/no questions
- Long-form questions
- Conditional fields that depend on how other questions are answered

Submission requirements should be in an order that makes sense. If you're using an eProcurement platform to receive submissions online, put your submission requirements in the same order between the documents and the platform, to make it easier for suppliers to check items off as they go. Suppliers will require time and preparation to address all your questions and concerns, so don't ask for things in the eProcurement platform that you didn't reference in your RFP.

✗ **BAD**

Requirements:

1. Company background
2. Pricing per plant, peonies, 240
3. Contact information
4. Description of maintenance plan
5. Declaration of Conflict(s) of Interest
6. Pricing per tree, assorted saplings, 30

→ *No logical order, similar items not grouped together.*

✓ **GOOD**

Requirements:

1. Contact information
2. Company background
3. Description of maintenance plan
4. Pricing per plant, peonies, 240
5. Pricing per tree, assorted saplings, 30
6. Declaration of Conflict(s) of Interest

→ *Logical order, flows better from one item to the next.*

6

Note your important deadlines

Suppliers will need to know all the important dates for the RFP, including the deadlines for questions and issuing addenda, dates of any mandatory or optional meetings, and most importantly, the submission deadline.

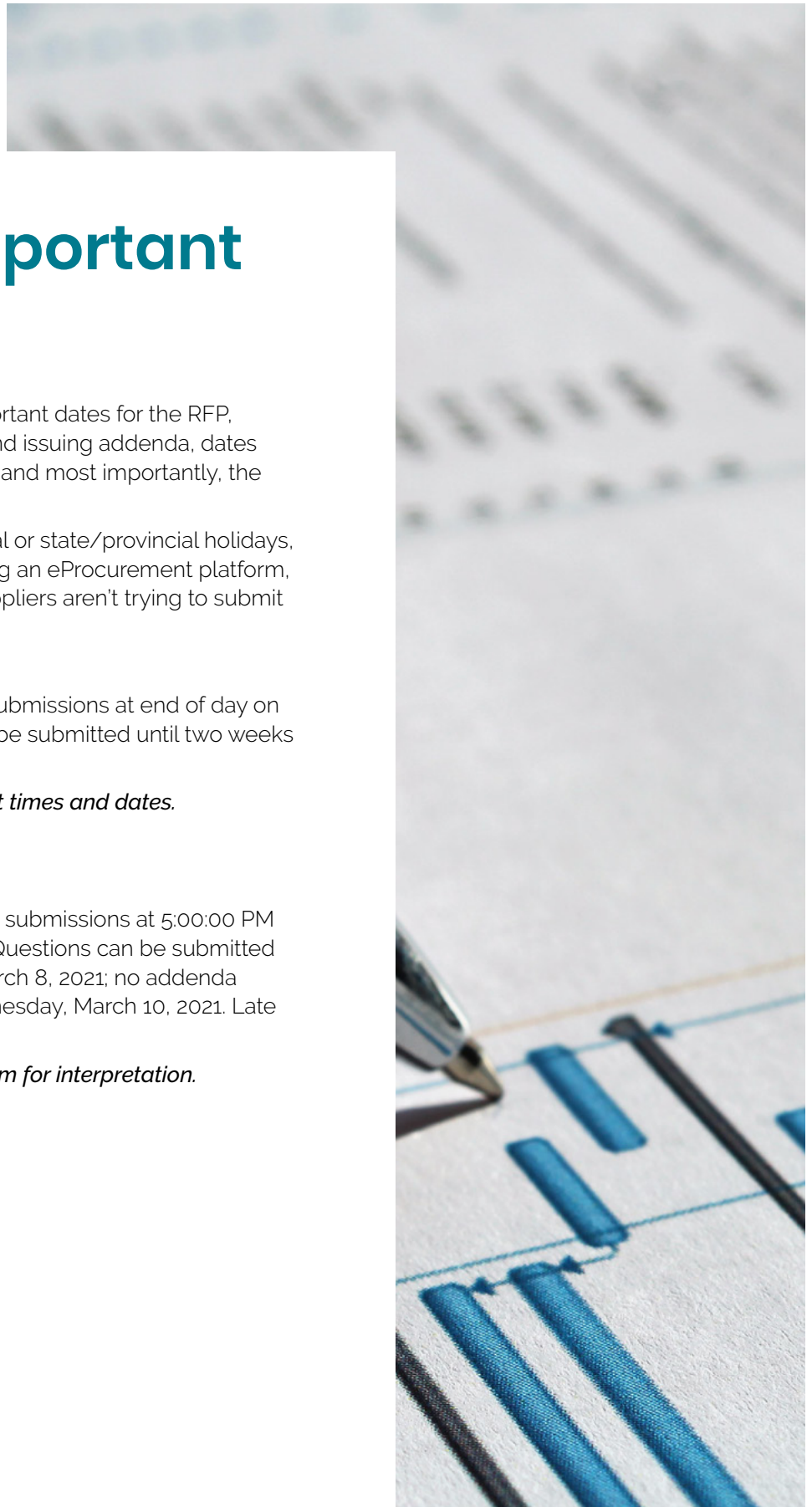
Try to avoid deadlines that fall on federal or state/provincial holidays, or outside of office hours. If you are using an eProcurement platform, consider their support hours so that suppliers aren't trying to submit when they aren't able to get support.

✗ BAD This opportunity closes for submissions at end of day on Monday the 22nd. Questions can be submitted until two weeks before the deadline.

→ *Unclear and vague; give exact times and dates.*

✓ GOOD This opportunity closes for submissions at 5:00:00 PM EDT on Monday, March 22, 2021. Questions can be submitted until 5:00 PM EST on Monday, March 8, 2021; no addenda will be issued after 5:00 PM Wednesday, March 10, 2021. Late submissions will not be accepted.

→ *Clear and precise, with no room for interpretation.*



7

Detail your evaluation criteria and process

Procurement must be fair and transparent. Make sure the criteria you select can be evaluated and graded objectively. Disclose the evaluation scorecard, including how criteria will be measured and weighted. This will not only help suppliers focus their submissions on the most important areas, but it will also help your team evaluate objectively.

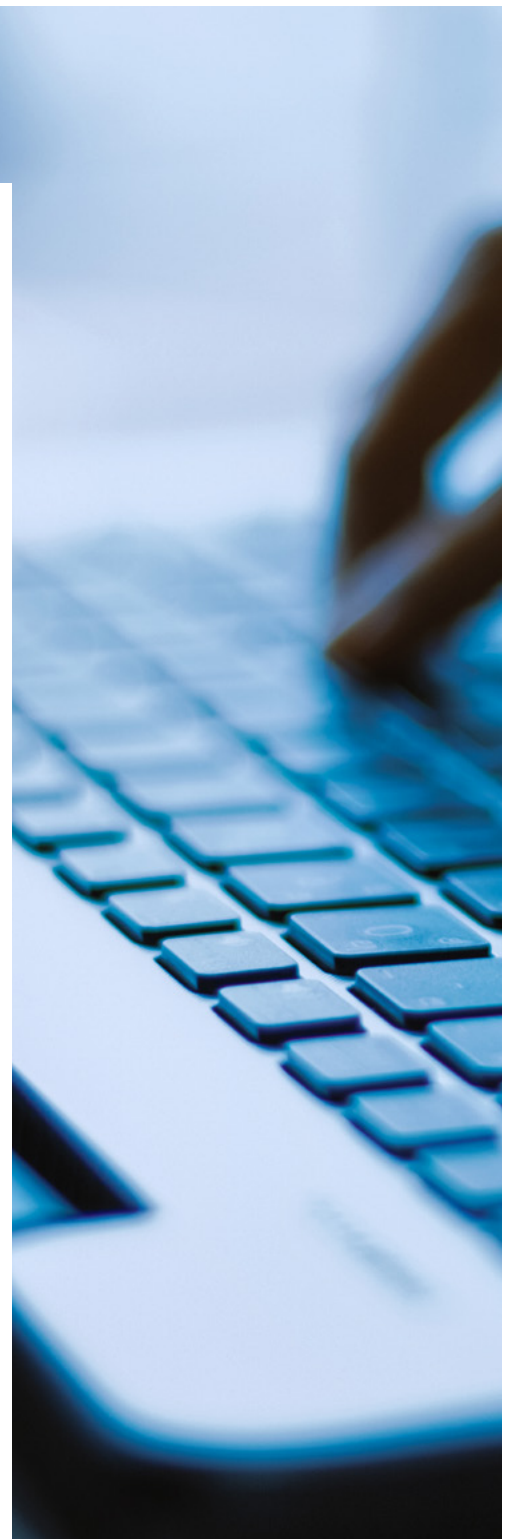
✗ BAD We'll take the bottom three prices, and have 5 people rank which proposal they like best, and choose the one that ranks the highest for the most people.

→ *Too subjective, unclear how requirements beyond price contribute to the total ranking.*

✓ GOOD Our evaluation team will be scoring on the following criteria:

- Price 30%
- Qualifications & experience 20%
- Approach to providing services 20%
- Local sourcing 15%
- Responsiveness to RFP 10%
- Diversity 5%

→ *Clear weighting for each criteria that aligns with the organization's values. Each of these criteria should be explained in more detail within the RFP document.*



Want more information on the procurement evaluation process?

→ **CHECK OUT OUR ON-DEMAND WEBINAR:**

[Skating on Thin Ice: Common Mistakes in Public Procurement Evaluation Processes](#)

8

Distribute the RFP

The best-written RFP in the world won't garner any acceptable responses if it's not distributed effectively. Between current health and safety challenges, the changing digital landscape of procurement, and supplier convenience, it is no longer acceptable to announce an RFP opportunity in a local paper and expect suppliers to pick up documents in person. Make use of websites, e-bidding, and eProcurement platforms to distribute the RFP to interested suppliers.

✗ **BAD**

RFP 2021-03-01-LANDMAIN-TWHPBLD-OPEN

Accepting proposals for landscape maintenance for public buildings until Mar. 22.

Register for documents at Township purchasing office.

123 Township Road #245

555-867-5309

Requiring in-person pick-up of paper documents limits and inconveniences your supplier pool. No website info, office hours, or contact name for more information.

➔ *Requiring in-person pick-up of paper documents limits and inconveniences your supplier pool. No website info, office hours, or contact name for more information.*

✓ **GOOD**



➔ *Posting on an eProcurement platform can automatically alert interested suppliers of your opportunity, and provide a direct link to view and print the documents. No paper required!*



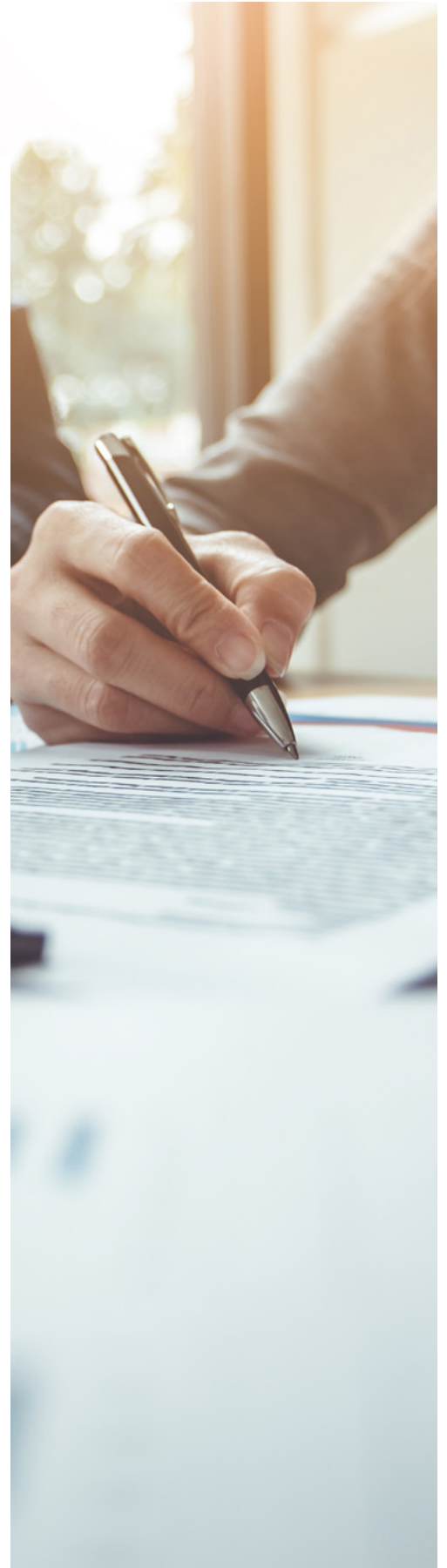
bids&tenders has a vast network of suppliers who will be automatically notified if your opportunity falls in a business category of interest to them.



General tips for writing an effective RFP

These tips apply to all aspects of the RFP document and submission process, and will help suppliers with their responses:

- 1** **Keep it simple.** Don't add superfluous detail.
- 2** **Be specific,** but not overly prescriptive. Consider if the specificity of a requirement is an actual need, or just a preference.
- 3** **Don't rush it.** Building proper documentation, ensuring the accuracy of the requirements and ease of submission, and developing measurable evaluation criteria may take time, but it will ultimately result in better responses that are faster and easier to evaluate. If using an eProcurement platform, walk through the document in comparison to the platform's interface to make sure it is logical and complete.



Next steps

Getting started with **bids&tenders** is easy. We'll work with you every step of the way to get you up and running.

Simple pricing models

Some procurement teams prefer to cover the cost of bid submissions, while others opt for a supplier pay model. Whatever your preference, **bids&tenders** can support it.

Customized onboarding

We'll work with your team to create an onboarding plan to ensure **bids&tenders** is working for you, right from the start. We'll also help to support your team in getting existing suppliers up and running, with tailored training sessions.

Ongoing support

Have a question a few months in to using **bids&tenders**? You'll have full access to our training portal whenever you need it, for as long as you need it.

