

Understand and Interpret an RFP



It is essential that you respond to each section of the RFP in your proposal. You will lose points if you do not provide the requested information in each section. It may be useful to think of each requirement of the RFP as a question. In your proposal, each section needs to provide the answer to the RFP's question.

Be clear and concise with your answers. Provide as much detail as is relevant to completely address the requirement.

Technical and Legal Information

- Read carefully and thoroughly all information provided.
- Take note of instructions that must be followed, for example: time and date of submission, number and type of copies to provide, how to submit questions, etc.
- Make a check list of requirements.
- Ensure that your organization complies with all requirements described in this section.

Background Information

- This is the description of what the department is buying: the service, objective of the service, target group, language, service location, monitoring of service, etc.
- You must address each of these requirements in your proposal.
- Failure to address each element clearly and concisely will result in a loss of points or disqualification.

Proposal Content and Requirements

- These are the mandatory and general requirements.
- You must respond to each requirement with specific information about your organization, staff, and the role each person will play, etc.
- When asked to provide references, be sure that they are relevant and that you demonstrate how they relate to the proposed work. Do not indicate that "references are available upon request". They must be provided if requested.

Prepare the Proposal



Writing

- Be sure the individuals writing the proposal understand the RFP and are able to concisely convey information about your organization. It is essential that you carefully read and interpret every aspect of the RFP.
- Have more than one person review the proposal – a few pairs of eyes are better than just one for verifying both grammar and message.
- Provide clear and concise information that addresses the specific requirements and every aspect of the RFP.
- Assume that the reader knows nothing about your organization; describe your organization and your activities as if the reader had no knowledge of your previous work.

Style and Presentation

- Style and presentation count. Make sure your proposal is packaged in a way that is organized and professional looking (for example, in a binder, with labeled tabs for the different sections).
- It is best to organize your proposal information in the same order as it is requested in the RFP. Sections should be labeled and correspond to the title and numbering in the RFP.
- Additional documentation or information does not add value to your proposal. Provide only the documentation requested in the RFP.

Understand the Evaluation Process



General scale used for rating proposals:

- Exceptional
- Surpasses Normal Standards
- Information well demonstrated / presented with logical flow
- Contains required criteria / acceptable with good clarity
- Contains required criteria / acceptable
- Contains required criteria / lacks clarity
- Information difficult to understand / poorly presented
- Contains inconsistencies / lack of precision
- Missing information / seems to have not understood based on response
- Missing a lot of information
- Completely unacceptable / not pertinent

Phase One – Presentation

1 - Quality of Proposal: indicates vendor's capability, interest and attention to detail.

Your proposal will be assessed on the following points:

- a) Entirety – *were all of the required elements answered?*
- b) Pertinence – *did the information relate to the topic of concern?*
- c) Precision – *was the information accurate?*
- d) Organization of material – *did the information flow in a natural progression?*
- e) Conformity to instructions – *did the proponent follow the instructions given?*

2 - Company Background: indicates vendors demonstrated ability to perform the task – years in business, staff, location, legal status, mandate, mission board of directors.

- a) Knowledge of subject
- b) Brief Summary of the company
 - Years in business
 - Number of staff
 - Location
 - Legal status
 - Mandate
 - Mission
 - List Board of Directors
 - Policies on records management, confidentiality, privacy and personal information

3 - Company References: indicates vendors degree of experience, knowledge and expertise in providing the services described in the RFP.

- a) List of (normally 3) references with contact information (see handout)
- b) Completion of projects of a similar scope (see handout)
 - Description of the project or service delivered
 - Company name, address, telephone, fax and contact for who the product or service was delivered

4 - Project Management Team and References: indicates how the vendor will manage and oversee the requested service related to supervising, invoicing and reporting on the project.

- a) Resumes of proposed management team (Experience, Education, Expertise)
- b) Client references with complete contact information

5 - Project Team and References: proposed team must be capable of delivering the services required (the organization must have the capacity to deliver in both official languages)

- a) Resume of each team member involved in the process (Experience, Education, Expertise)
- b) References with complete contact information
- c) Method of recruiting (if required)
 - Provide the method of recruiting
 - Provide copies of the job posting(s)
- d) Subcontracting
 - Information on each subcontractor
 - How the relationship will be managed
 - Identify a sole interface between the joint partners and the Department

NOTE: If you do not pass the evaluation of the mandatory requirements in Phase 1 (Presentation), your proposal will be disqualified and will not proceed to Phase 2 (Price). This does not apply to Standing Offer Lists because there is no cost requirement for Standing Offer Lists.

Phase Two – Price

- Scoring is often based on a formula.
- The bid with the lowest price will not necessarily be chosen.
- The quality of the proposal and its ability to address all requirements in the RFP outweigh the benefit of a lower cost proposal.
- What are the similarities between successful positioning of a product or service (*selling*); and submitting a response to an RFP?