



## Request for Proposal Template

This **Request for Proposal (RFP) template** is designed to help state and local governments create RFPs that attract high-quality proposals from vendors committed to improving community outcomes.

We understand that writing an RFP can often feel overwhelming, especially for government staff who may be unsure where to start. This template serves as a practical starting point, guiding your government in producing a streamlined, well-organized, and appealing RFP. Key features of this template include:

- Sample language that you can adopt and modify for your specific context.
- Clearly identified outcomes to be achieved through the contracted service.
- A logical organizational structure with project-specific information at the beginning of the RFP.
- Proposer checklists and response workbooks to help proposers know what to submit.

While this template provides best practices and recommendations, it's essential to collaborate with your grants, procurement, legal, and technology teams to ensure compliance with your jurisdiction's specific requirements and capabilities.

### Instructions for Using This RFP Template

This document serves as a guide for creating RFPs that will help your government invite high-quality proposals from vendors/grantees.

To use this template:

1. Customize the sections marked with placeholders and *italics* (e.g., [*Name of Department*]) with your specific information.
2. Review and adapt the sample language provided, tailoring it to fit your agency's needs.
3. Ensure that legal, procurement, and technology teams have reviewed the final document to conform to local regulations.
4. Follow the submission guidelines for clear communication with potential proposers.
5. Use this template's structure to ensure that all key details are covered, including the background, scope of work, performance metrics, and evaluation criteria.

**Request for Proposals (RFP) for**

**[Name of RFP]**

**[Name of Department, Agency, or Division]**

**[Name of Government]**

|  |   |
|--|---|
| <b>RFP SUMMARY:</b> <i>Provide a 1-3 sentence summary of the service or program.</i> |   |
| <b>RFP ISSUE DATE</b>  | <i>[Date]</i>   |
| <b>PROPOSAL DUE DATE</b>   | <i>[Date and time]</i>  |
| <b>PRE-PROPOSAL CONFERENCE</b>   | <i>A pre-proposal conference will be held on [date] at [time], [time zone]. It is [mandatory/highly recommended] that all proposers attend.<br/><br/>[Insert location/virtual meeting link]</i> |
| <b>DEADLINE FOR QUESTIONS</b>  | <i>The deadline for questions is [date] at [time] [time zone]. Questions and/or inquiries must be submitted in writing to [name and contact information].</i>                                   |
| <b>PROPOSAL SUBMISSION PROCESS</b>   | <i>Include a brief description of your government's proposal submission process, including the submittal web link.</i>  |
| <b>RFP WEBSITE</b>   | <i>Link to any websites proposers should be aware of to access materials and view updates for this procurement.</i>   |
| <b>RFP OFFICIAL CONTACT</b>  | <i>[Name, Title, Contact Information]</i>   |

**RFP # XXXXXXXX**

## **SECTION 1: Background**

*This section provides critical information that vendors/grantees need to fully understand the project. It should include key details about the department, service, or program in focus.*

### [Name of Department or Agency] Overview

*Provide relevant background on the departments or agencies involved, highlighting important aspects of their strategic vision that align with this RFP. Include hyperlinks to direct vendors to additional resources as needed.*

### [Name of Service or Program] Overview

*If this RFP is for an existing service, ensure vendors/grantees understand the history and effectiveness of your service delivery model. This section should include:*

- *A clear explanation of how your government has provided this service in the past.*
- *Information on recent initiatives (internal or external) that may have impacted the service design or demand.*
- *Data and metrics related to the target population or performance outcomes to date.*

### [Needs Statement / Problem Description]

*Offer a concise overview of the challenge your government aims to address through this procurement. Include data that describes the scope of the problem and how it impacts the population to be served. A strong needs statement includes:*

- *A description of the intended recipients or end-users of the service or product.*
- *Quantified data points that help vendors understand the problem's scale and how success will be measured.*
- *A comparison between the current state and the desired future state, helping vendors visualize the progress you're aiming for and how they can contribute.*

## **Outcomes**

*Include outcomes (recommend no more than 3 - 5) that define for proposers what it looks like to successfully solve and make progress with the problem. Keep in mind that outputs are about what you did and produced; outcomes are about what difference it made.*

*Key features of well-defined outcomes includes:*

- *Fall within the contract/grant program's scope.*
- *Informed by the perspectives and needs of the grantees and communities served by the contract/grant program, especially historically underserved communities.*
- *Be achievable within the contract program timeframe.*

## **Award Terms**

*Include the duration of the contract and number/term of renewal options. Also include the contract type expected (e.g., firm-fixed, cost-plus, not-to-exceed) and information about your budget, which can help proposers to right-size their approach. If relevant, provide any additional information about whether multiple awards will be made.*

## **SECTION 2: Scope of Work**

*The Scope of Work is the core of the RFP. It must be clear, specific, and aligned with your desired outcomes, so proposers fully understand what is expected and what tasks they will be responsible for if awarded the contract. The Scope of Work also forms the foundation for performance standards in the contract.*

*Ensure that your Scope of Work:*

- *Directly aligns with the outcomes you want to achieve. Providing context helps vendors understand the steps they must take to deliver these outcomes.*
- *Is well-structured and easy to follow, so vendors can clearly grasp your expectations.*
- *Is realistic and achievable, ensuring that the work proposed matches the vendor's capabilities within the available time and budget.*

### [Services to be Provided]

- *Clearly outline the services, key tasks, and major components to be performed. Specify the estimated quantity and type of services required over a defined time period (e.g., month, year), so vendors can accurately estimate costs and timelines.*
- *Depending on the complexity of the work, you can use subsections or organize the content by types or categories of work the vendor will perform.*

### [Optional: Service Requirements]

- *Define the essential elements of the service or program, including critical requirements and key deliverables.*
- *You may want to include a high-level work plan or performance schedule with deadlines for deliverables, important milestones, and other key dates. Highlight any additional service aspects that will help vendors/grantees understand how to implement the program effectively.*

### [Optional: General Requirements]

*Provide detailed information about special requirements the proposer should be made aware of. This may include:*

- **Legal Requirements:** *Compliance with relevant local ordinances or state/federal regulations.*
- **Staffing and Organizational Requirements:** *Details on staffing models, staff locations, supervision and management, pre-employment screenings, training, and required credentials/licensing.*
- **Data and Technology Requirements:** *Specifications for hardware/software, internet/email capabilities, client satisfaction assessments, program evaluations, and recordkeeping/reporting.*
- **Financial and Compliance Requirements:** *Include insurance needs, financial controls, status reports, and audited financial statements.*

- **Budget Requirements:** such as cost standards, program funding sources, proration, third party reimbursement, flat fees, fee-for-service revenues, and sub-consultant cost schedules.

### SECTION 3: Performance Metrics and Contract Management

*[Performance Metrics]*

- *[The government/department/agency] seeks to collaborate with the awarded vendor(s) to establish and monitor key performance metrics throughout the contract, ensuring continuous improvement.*
- *Initial performance metrics have been identified, and [the government/department/agency] is eager to work with the selected vendor(s)/grantee(s) during contract negotiations to refine or expand these metrics.*
- *The final set of performance metrics, along with the frequency of data collection, will be determined during negotiations with the selected vendor(s) / grantee(s). These metrics may be adjusted over time to reflect evolving needs and priorities.*

*Propose 3-5 performance metrics that will be used to assess the vendor’s / grantee(s) progress in achieving contract goals. A balanced mix of output and outcome metrics is recommended:*

- **Output measures** focus on the activities carried out, such as the number of clients served, jobs created, or students receiving services.
- **Outcome measures** capture the results or impacts of those activities, like reductions in unemployment, fewer car accidents, or higher resident satisfaction.

Where applicable, include performance targets (both overall and at key intervals) to guide progress tracking. Clearly outline any additional data collection, reporting requirements, and monitoring responsibilities for both parties. The selected vendor will be responsible for providing relevant demographic, performance, and service data to support performance evaluations.

It may be helpful to organize these metrics using a table format, as shown below.

| <b>Performance Metric</b> | <b>Data Source</b> | <b>Data Collection Frequency</b> | <b>Data Collection Responsibility</b> | <b>Data Review Cadence</b> | <b>Past Performance Benchmark (if known)</b> |
|---------------------------|--------------------|----------------------------------|---------------------------------------|----------------------------|--|
| [Metric # 1]              |                    |                                  |                                       |                            |  |
| [Metric # 2]              |                    |                                  |                                       |                            |  |
| [Metric # 3]              |                    |                                  |                                       |                            |  |
| [Metric # 4]              |                    |                                  |                                       |                            |  |
| [Metric # 5]              |                    |                                  |                                       |                            |  |

#### **SECTION 4: Contract Performance Monitoring**

- *In line with [government/department/agency]'s commitment to achieving better outcomes, we will work closely and consistently with awarded vendors/grantees to strengthen contract management, enhance results, and refine service delivery based on proven strategies.*
- *Accurate and timely data is essential for driving improvements, ensuring compliance, monitoring trends, and evaluating performance. Therefore, [government/department/agency] reserves the right to request and collect additional key data and metrics from vendors as needed.*
- *Clearly outline how your government will collaborate with the vendor/grantee to monitor progress, identify challenges, and make necessary adjustments to meet the contract's objectives. Specify the communication protocols, including how and when data and reports should be submitted, the frequency of updates, and the required formats (e.g., performance reports).*

## SECTION 5: Evaluation Criteria and Scoring Rubric

### Minimum Qualifications

List any minimum requirements vendors/grantees must meet to bid on the opportunity. Minimum qualifications may include:

Specify the essential requirements that firms must meet to be eligible to bid. These qualifications may include:

- Legal authorization to conduct business within the jurisdiction.
- A clean record, without debarment by federal, state, or local government.
- Relevant experience that meets the minimum standards (e.g., references or prior projects).
- Required licenses or certifications.

Only list qualifications that are strictly necessary, as these criteria will be used to disqualify ineligible proposers. Be mindful not to include requirements that could unnecessarily limit the pool of qualified candidates, as this could reduce competition. Note that many RFPs do not include minimum qualifications.

### Evaluation Criteria

Develop a set of tailored evaluation criteria specific to this RFP to enable a thorough assessment of the submitted proposals. Each criterion should be weighted by assigning a percentage or points based on its importance.

For ease of scoring, align these criteria with the categories of information requested in the proposal. Common categories you may use or customize include:

- Qualifications, Experience, and Capacity
- Service Delivery or Project Approach
- Project Management, Performance Improvement, and Communications
- Cost Proposal and Narrative
- Equity and community considerations

| <b>EVALUATION CRITERIA</b>   | <b>POINT ALLOCATION<br/>[percentage or points]</b> |
|--|--|
| <b>[Title of evaluation criterion 1]</b><br><br><i>In a few bullet points, describe what this criterion refers to and what you will be evaluating for under this criterion. Be transparent with the proposer about what you are looking for!</i> | [percentage or points]                             |
| <b>[Title of evaluation criterion 2]</b>   | [percentage or points]                             |

|  |  |
|--|--|
| <i>In a few bullet points, describe what this criterion refers to and what you will be evaluating for under this criterion. Be transparent with the proposer about what you are looking for!</i> |  |
|--|--|

**SECTION 6: Selection Process, Award, Protest Procedures and Submission Instructions**

**Selection Schedule**

*Tailor the table below to reflect important upcoming dates, including the period for questions and answers, and estimated timing of contract negotiations. We recommend 8 weeks as the minimum time the RFP is open and checking that the due date for questions and the pre-proposal conference date are not too soon after the RFP issue date.*

| Schedule                              |               |
|---------------------------------------|---------------|
| Event                                 | Date(s)       |
| RFP issue date                        | [Date]        |
| Pre-proposal conference               | [Date]        |
| Deadline for questions                | [Date]        |
| <b>Proposals due</b>                  | <b>[Date]</b> |
| Interviews with shortlisted proposers | [Date]        |
| Anticipated contract award date       | [Date]        |
| Anticipated contract execution date   | [Date]        |

**Selection and Award Process**

*Provide a detailed explanation of how the evaluation process will be conducted and how proposals will be scored. Use your government’s standard language or consult with your purchasing office to ensure accuracy. This section may include:*

- **Phases of Review:** *Outline the different stages of evaluation. For example, in the first round, a responsiveness review will assess whether all required documents are complete, potentially disqualifying incomplete submissions. In the second round, the evaluation committee will*

*review written proposals and invite top candidates to participate in a third round of interviews or demonstrations.*

- **Unique Selection Components:** *Highlight any additional steps in the selection process, such as interviews, presentations, demonstrations, or site visits, if applicable.*

### **Protest and Appeals Process**

- *Provide a clear explanation of the protest and appeals process, or include a link to the relevant website or legal code. Use your government's standard language and consult with your purchasing office to ensure the correct terminology and procedures are outlined.*

### **Submission Instructions**

*Provide clear guidelines for submitting proposals. These instructions should include:*

- **Submission Method:** *Specify where and how proposals should be submitted. (Electronic submissions are recommended over hard copies whenever possible.)*
- **Proposal Tips:** *Offer helpful advice for creating a strong proposal.*
- **Length Limits:** *Outline maximum page counts for the entire proposal, or set page, word, or character limits for specific sections.*
- **Submission Modifications:** *Detail the rules for making changes to submitted proposals.*
- **Questions and Answers:** *Explain the procedure for proposers to submit questions and how to access answers while the RFP is open.*

### **SECTION 7: Terms and Conditions**

- *In consultation with your purchasing office, include your government's standard terms and conditions in this section. Consider organizing the terms into two categories: those that apply specifically to the solicitation and proposal submission period, and those that will govern the resulting contract once awarded.*