

THE RFP PROCESS

1. The RFP (General Information)
 - a. Make a copy of the solicitation. Save an original copy and a working copy.
 - b. Read it, read it, and read it again.
 - c. Learn what the lettered sections of the RFP are (e.g. Section B refers to your pricing, Section C is the scope of the work, Section K contains Representations and Certifications, Section M specifies the bid evaluation criteria).
 - d. Information critical to the bid can be scattered throughout the various sections of the RFP.
 - e. Put the RFP in a three-ringed binder for easy use during the response process. Use small post-it notes to mark important pages and paragraphs. Do the same with every document received in conjunction with the solicitation i.e. correspondence, amendments, etc.
 - f. Make a plan. Decide who will participate in preparing the proposal and who will do what. Make sure everyone understands how each person's responsibilities relate to everyone else's.
2. How to read the RFP
 - a. Reading from page one to the end is one way to read the RFP, but not the best. If it is a small solicitation, this method is average. If the solicitation uses the SF33 then you need to read the solicitation by reading the related parts together starting with Section B, Supplies and Services and Prices/Costs and Section L, Conditions and Notices to Offerors. This will give you a good understanding of what they want and if you meet the requirements.
 - b. Read section L again. This time in conjunction with Section M, Evaluation Factors for Award. Now you should start to see what the factors are that will be used in the evaluation process. Do you see a problem? Are you lacking in some areas? Can you fix them and still bid?
 - c. Determine the general and specific requirements of the solicitation by reading Section C, Statement of work and Section J, List of Attachments. Carefully review the specifications. You must be able to meet them. Remember Section C contains general requirements while Section J contains specific requirements that may supercede statements in Section C.
 - d. The next areas to read are: Section I, Contract Clauses; Section H, Special Instructions or requirements; Section D, Packaging and Marking; Section E, Inspection and Acceptance; Section f, Performance/Deliveries; Section G, Contract Administration.
3. Questions about the RFP.
 - a. If you do not understand information in the RFP contact the Contracting Officer. Put it into writing. Make sure there is a date by which questions are due and that you respond by that date.

- b. Make sure you word your questions carefully to ensure you do not giveaway your strategy or pricing to your competitors. Responses to the question by the contracting officer will be distributed to all bidders.
 - c. Verbal information given to you by the Contracting Officer is not binding.
4. The Proposal Outline
- a. Construct a proposal outline:
 - i. This can contain important points from the RFP
 - ii. Information on what you are planning to say in each section
 - iii. For each section of your outline indicate the estimated number of pages that will be written, the person responsible for doing the writing and the evaluation points.
 - b. Put the important instructions on the first page or at the top of the outline; instructions might include; proposal due date, number of copies, page limits, font sizes, page margins, packaging and delivery instructions.
5. The Proposal Schedule.
- a. Make one and stick to it.
 - b. Work backwards from the proposal due date.
 - c. Make sure you leave enough time for copying, binding, and delivery of the proposal.
6. Proposal Preparation.
- a. Make sure you are familiar with the instructions in Section L of the RFP.
 - b. Study the proposal evaluation criteria and the points allocated to each section/subsection of the technical proposal, as well as the points that are allocated to cost. This information will tell you what to emphasize and where to put your efforts with regard to the proposal preparation.
 - c. Hold an initial and follow-up meetings with your proposal team to discuss strategies, progress and problems.
 - d. Your Technical Approach and Strategy should provide answers to the following questions: who, what, where, why, when and how.
 - e. Depending on the instructions in the RFP, your management section might contain a discussion on how you will manage the overall project, a discussion on how you will manage and oversee the work of your staff and subcontractors, an organization chart of the project and the position descriptions of project staff.
 - f. In your personnel section, you may be required to include narrative information on the experience and skills of the staff members you are proposing for the project and/or their resumes.
 - g. In your related experience or Capabilities section, you may need to demonstrate that you have performed similar or related work.
 - h. Your proposal may have other sections such as an Executive summary, a discussion of your understanding of the Problem, Appendices, or other required information as specified by the RFP.
 - i. Use tables, charts and graphics to summarize information.
 - j. Compile all documents necessary for a complete proposal. Put them in the same sequence that they are called for in the solicitation. Put a cover page

on top clearly identifying the name of the offeror, the solicitation the date and time due, and the customer's name and address.

- k. Check the entire proposal for the following: technical consistency, spelling, page numbering, section/subsection numbering or lettering, consistency of appearance of headings, subheadings, font types and font sizes.
 - l. Make sure that you have filled in and signed all the forms in the RFP that are required.
 - m. DO NOT BIND the copies being submitted unless the instructions say to do so.
7. After the proposal submittal.
- a. Contact with the customer should be through one point of contact in your organization.
 - b. If asked for additional information, always put it into writing. Keep a paper trail.
 - c. During negotiations: know your customer, do not agree to anything until you are sure how it links to other things agreed upon. Make sure that you can do what they are asking. Make a list of everything you agree to.
 - d. If you get the contract, make sure you read over the contract documents and understand them.