

Request for Proposal Template

Table of Contents

- Overview.....1
 - Purpose of the Request for Proposal (RFP)1
 - Scope of Project1
 - Project Background Information1
 - RFP Instructions2
- Questions Requiring Response4
 - Category #14
 - Category #24
 - Category #34
- Attachments.....4

Request for Proposal Template

Overview

Provide a brief overview (4-5 lines) of the company and its products/services. Include items, such as the following.

- Name of business, type of entity (e.g., business-to-business, non-profit, online store)
- Products/services provided
- Primary market for business
- What makes the business unique

Purpose of the Request for Proposal (RFP)

Identify the purpose of the Request for Proposal (e.g., redesign website, develop a marketing plan, consult on employee benefits).

Scope of Project

List the expected tasks for completing the project. For example (website redesign):

Planning Phase – including meetings, site review, observations, recommendations, expectations for project updates and support

Development Phase - including structure, functionality, navigation, key messaging, branding, content development, SEO, privacy, and security

Testing Phase - including areas tested, timing for testing, results reporting

Roll-out - including method, timing, critical deadlines, and communication

Project Background Information

Review current situation. Identify what is working and what needs to be fixed (or the reason for the initiation of the project and Request for Proposal).

For example (website redesign):

Request for Proposal Template

- Content and look of current website is outdated and needs a modern approach.
- Navigation is difficult and needs to be more intuitive and interactive for areas, such as webinar sign-ups, downloads, and contact forms.
- Site search tool does not produce desired results and needs to be updated to deliver more specific and useful results.
- Current site needs to be redesigned to accommodate multiple device forms (e.g., desktop, tablet, mobile).
- Content Management System needs to be updated or replaced to allow for customization, editing, publication, and overall management.
- Site requires SEO optimization.
- Develop a style guide for uniformity, consistency, and branding.

RFP Instructions

Include your instructions and criteria for completing and submitting responses.

Timeline – for any task with deadlines. For example:

Task	Due Date
Release RFP	May 1, 2023
Questions from vendors	May 8, 2023
RFP response deadline	May 26, 2023
Presentations by selected vendors	May 30 – June 2, 2023
Award contract to selected vendor	June 19, 2023

Request for Proposal Template

Evaluation Criteria – explain the factors used in selecting a vendor. For example:

- Vendor experience and expertise
- Completeness of RFP and overall strategy
- Vendor capabilities in meeting required support and service
- Results of interviews and reference checks
- Overall costs of services and competitiveness with other bids

Contact information – provide contact information for vendors to direct questions to and direct completed RFP.

- Name, Title
- Email address

RFP submission – provide instructions for the delivery of the completed RFP, such as:

• Due date
• Method of delivery (e.g., via mail, in-person, email, online)
• If applicable, number of required printed copies
• Advise if late receipt results in rejection
• Indicate if finalists are required to deliver presentation (virtually or in-person)
• Number of required references with contact information

Request for Proposal Template

Questions Requiring Response

In this section, add specific, measurable questions to be used for evaluating vendors. Group questions into categories.

For example (redesign of website RFP) #1 – Design, #2-Navigation, #3-Content Management System (CMS), etc.

Category #1

Question 1-1

Question 1-2

Questions 1-3

Category #2

Question 2-1

Question 2-2

Questions 2-3

Category #3

Question 3-1

Question 3-2

Questions 3-3

Attachments

Place any RFP attachments at the back of document (e.g., product design models, reports, product architecture).