



Better Than Sliced Bread: Writing Effective RFPs

by Barbara Punt

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Ask a direct question, get a direct answer. Ask a convoluted question, get a confusing answer. Writing a “successful” Request For Proposals means conveying your request clearly enough so someone can answer your questions clearly.

Don’t forget, there are two sides to this process. You need vendor responses as much as they need your work. If they don’t respond, who is going to do your project? If you don’t provide work, they can’t pay the bills. Writing the best RFPs requires considering the respondents’ point of view: what do you want to know?

Begin in the beginning.

Provide a table of contents. Among the biggest complaints I’ve heard from companies submitting responses are the RFPs they receive aren’t written clearly. Information important to prospective vendors is hidden somewhere in the morass of drawings, specs, and descriptions so that it’s not readily apparent “What do they want from me?” and “When is this proposal due?”

Put bid-related information in one section, so the bid process, information required for the submission, selection criteria, and both bid and project schedule are easy to find. It’s important to understand that prospective vendors may carve up the RFP you’ve given them and assign different portions of it to various people in their company, or even in other companies who may partner with them. So the person pulling it all together at their end may have some folks looking at the drawings you’ve provided, other folks looking at the specs, another department figuring out how your schedule requirements dovetail with their existing commitments, and so on. Make it easy for them to answer your

questions so that you can understand what they are telling you.

Who are you and why are you writing to me?

Provide a brief description of your institution and the project for which you are soliciting proposals. State specific facts regarding budget/schedule/square footage, other parties involved in the process (e.g. the exhibit designer and/or developer); and designate a contact person at your end.

Get to the point.

Don’t flood potential respondents with too much information. Often the project description is only a few paragraphs, and may refer to a lengthier document posted online or included in an attachment to the proposal. The reason for this is the person writing the response proposal needs to have a “crib sheet” up front so they can access specific information they need quickly.

Get real.

Another complaint I hear from companies is giving an unrealistic response time. RFPs sent out on Friday the 1st and due back on Monday the 10th may look like you’ve given them ten days to reply, but you haven’t taken into account that they have other obligations besides responding to you. Equally difficult for vendors is when they receive the RFP and the only way they can finish it is over a holiday. The message you send by giving them too little time to respond is that you may be unreasonable in your future requests and could become a “Client from Hell.” “Fine,” prospective vendors may think. “If you are going to be like that to work with, I’m going to charge you accordingly for the extra time it’s going to take to handle you.” The same is true for providing a project schedule that screams “RUSH” at every stage.

If vendors don't have sufficient time to do the work, they are going to have to hire more staff, pay overtime, and work really long hours. This doesn't help you at all—that means you are going to get less product for your money.

Be fair.

It's perfectly fair to ask a company for information about their management style and tools, staff to be assigned to your project, approaches to the work at hand, and a description of how the company will work with you. However, asking a company to provide you with a detailed creative response to the questions you pose borders on your soliciting solutions for which you have not paid, and which you may use in any manner you choose (including not hiring any of the respondents, and running with the solution they provided; or, worse still, using their approach but awarding the contract to another company). Similarly, if you are asking companies to submit proposals for fabricating something for you, there may be a limit to how thoroughly they feel they can answer your question. The same concerns apply —“Sure, we'd like to answer the question,” they think, “but how can we do this without giving away trade secrets to our competitors?”

Be really fair.

If your boss asked you to come up with some ideas for an exhibit on widgets, it would be nice to know what the budget was going to be before you put in any time thinking up things that you can't afford. Similarly, institutions sending out RFPs will get better results by stating budget parameters for the project. Some institutions feel like they are “leaving money on the table” if they reveal their budget numbers, but a way around that is to ask for proposals which stipulate what you will get for the amount

you've named. This approach allows potential vendors to decide which projects make sense for them to bid on, and which ones they will walk away from.

What do you want from me?

Sometimes you know what you want, and are simply asking for companies to propose how they are going to do it or how much it will cost. Other times you want feedback on whether your specs make sense, or may be open to suggestions on alternative approaches different from what you've outlined. Both types of RFP are valid, but be clear on what you want before you solicit proposals from others.

In addition to being clear as to what you want, be clear as to what you're going to provide. Do you intend for the company you hire to do a project from soup to nuts, or provide a turnkey solution to something? Do you want your staff to work with them collaboratively? Do you want the company to provide something which your staff will inherit and refine in years to come, and if so, does the company need to solicit input from your staff prior to any solution being implemented? Clarity on both sides of the table will mean a better product and an easier working relationship for all involved.

This applies to what your responsibilities are once the project is underway. Are there milestones that the company you've hired can reach only if you provide some information or some thing along the way? Be sure to write about how your work will dovetail with theirs, and be prepared for the schedule which they provide as part of their proposal incorporating deadlines for you and your staff. If there is no mutual understanding of what each party provides, it will be difficult to negotiate and

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execute a mutually satisfactory contract.

Please help me help you.

Vendors will often have questions about an RFP, and it’s important that you have someone who is able to help answer them. If the RFP is sent out and the contact person is on vacation, that poses a problem for prospective vendors: either they take their best guess at the correct answer to their question, and may make an incorrect assumption; or, they risk replying late (or shortening their reply time) by waiting until the answer can be obtained.

It’s also extremely important that all prospective vendors receive the same information. Therefore, the q/a period is best done through submitting written requests, not phone ones. It’s most fair to all vendors if all questions and answers are revealed to each company who received the RFP. Some vendors don’t like this (back to their concern about revealing trade secrets), but it protects you better than any other system. I say “protect” with a specific meaning in mind – you don’t want to get sued by an unsuccessful vendor who claims foul play on the part of information revealed to some parties but not all parties. There is a legal phrase called “**detrimental reliance**,” which in essence means if I played by all the rules and relied on the information you gave me, you can’t pick someone else based on different rules. This is why given instructions in a written form is so important. You need to avoid the appearance of “most favored nation” status, where one company is exempt from the rules imposed on other companies.

How does my proposal get evaluated? The days when people could sit in a mythical back room and pick their favorite company are long

over. In order to satisfy scrutiny from your Board, potential and/or current donors, and government agencies providing grants, it’s important that you have a rating system and rate responses in an objective way. Whether you reveal that system and how many points are awarded answers in any given section is up to you. The important thing for you is to have the decision-making process documented.

It’s always polite to provide information in the RFP as to when you’ll be making your decisions and contacting the unsuccessful bidders. You may want to allow some time in there for negotiating with the chosen bidder, because if the negotiations are unsuccessful, you will need to find another bidder, preferably one who hasn’t been told “no” and moved on to other work.

What am I supposed to give you? The easiest way to compare apples to apples is to provide all potential vendors with a digital version of the form which you want them to use in their proposal. You should send it in both paper and digital format, and require their responses be in both formats as well. You never know when the U.S. Postal Service will succeed and your server will not.

Dollars and sense. You may want to include various options in your RFP so that you can get a relative idea of what your menu of possibilities will be. It’s important to ask for information on economies of scale, and on relative complexities. If the RFP is not going to yield a hard dollar figure, you need a sense of which ideas you can afford and which ones you can’t, as well as whether you want to hire one company to do several portions of the project if in fact they were best suited to only a fraction of the whole.

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It’s also a good idea to ask for a written duration for the proposal in hand. If you reply within two months, will the information still be valid? If it’s reflecting a price, for how long will the price hold?

Be very careful when reviewing pricing, as it may reflect either holes in your system or double counts. For example, if the vendor has money set aside for shipping and so have you (in another budget), then you’ve budgeted for

the same item twice. Conversely, if you read the fine print and shipping is not included, then the bid is not going to include all the items which you want it to. Be wary of line items that either make no sense to you as written, or which seem to be wildly underestimated for the item at hand. There are companies that have as a business strategy the concept of get them hooked on a low price, charge for change orders thereafter. You can screen for these types of companies when you check references. ☀

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