

## **Parent Club Best Practices**

### **RFP Suggested Formats**

#### **Organizational Overview**

Provide a short description of your organization's mission and projects. This gives the vendor some background and focus as to the needs of the project.

#### **✓ Project Goals**

Identify the programmatic goals of the project. This allows the vendor to see how the project will serve the needs of the organization, and whether it fills a particular niche or program area or is a system that offers general support to numerous organizational goals.

#### **✓ Target Audience**

Describe who will be using the project deliverables and how large that audience is. Include any significant technical needs your audience may have. Describe how they will interact with the site, the organization, and each other throughout the project.

#### **✓ Project Deliverables and Specifications**

Identify the major components of the project. Describe the required features and design of each component, along with the support services you will require from the vendor both during development and after the project launch. The more details here, the more accurate the cost estimates will be. For areas where there are few rigid requirements, outline your goals and invite proposals for creative solutions.

#### **✓ Project Requirements**

Describe the administrative requirements and guidelines for the project, including completion dates, expectations on project testing and evaluation during development, intellectual property rights, billing requirements, and the maximum price range vendors should bid within. (Note that this price range should be lower than your internal budget for the project. Always allow yourself space to negotiate up if necessary.) Indicate where you want vendors to contribute their own recommended solutions, and where they should adhere to your exact specifications.

## ✓ **Proposal Format**

Describe the elements required in vendor bids, such as budget and cost breakdown per deliverable; tasks and timeline chart; staff roles and responsibilities; and vendor description. Outlining these elements ensures that vendors will give you what you want, and allows you to directly compare (and filter out) vendors.

## ✓ **Request for References**

Describe what information you require in references, such as how recent or long-term the clients were, what kinds of clients you would like to hear from, what kind of contact information you need, whether they are current or past clients, and so on.

## ✓ **Proposal Delivery Instructions and Contact Information**

To whom should proposals be addressed? How many copies should be sent? How should they be delivered (fax, email, mail), and who is the point of contact for phone inquiries? Is this a closed “by invite only” RFP or open, meaning you allow (or encourage) vendors to share this proposal?

## ✓ **Proposal Evaluation Timeline**

Identify the vendor selection process and timeline. Consider that vendors may provide useful feedback during phone calls that necessitate changing a part of the RFP — schedule this in so bidders know when to expect more clarifications. Adhering to a set process communicates to vendors that you know what you are doing. Vendors often spend non-billable time on proposal writing, so managing their expectations of your process helps build harmonious relationships.

## Disseminating Your RFP

Depending on your project needs, you may choose to target your RFP to specific firms, or broadly to attract more responses. A closed RFP approach targets a smaller group of known firms — vendors that have come recommended from trusted sources or that you have worked with successfully in the past. By closing the RFP, you are indicating that only invited firms may respond. This approach works well if you have a network of vendors already and the project is an overall match to their skill sets. Working with a consultant can help if you still want a closed process but need help identifying recommended vendors.