

## How to Write an RFP

A request for proposal (RFP) is a business document that announces a project, describes it, and solicits bids from qualified contractors to complete it. Most organizations prefer to launch their projects using RFPs, and many governments always use them.

When using an RFP, the entity requesting the bids is responsible for evaluating the feasibility of the bids submitted, the financial health of the bidding companies, and each bidder's ability to undertake the project.

Below is a checklist detailing the process for creating the perfect RFP. We will be using a fictional company for the walkthrough, namely Arnis Health, which is developing an RFP on behalf of a government client, TransformNation, for educational video production services.

### **Provide background information.**

Your RFP should always start with an introduction and overview of your business. This helps set the stage for potential vendors and allows them to better understand who they'll be working with.

You should keep this section brief. Just introduce your business, highlight your mission, and discuss the products and services you provide.

Example:

*Arnis Health is a health communication firm based in Washington, DC. Our mission is to empower teens and young adults to lead healthier lives.*

*For over 10 years, we've helped clients achieve their goals by providing marketing and communications services including campaign development, copywriting, and multimedia project support.*

### **Define your project purpose and goals**

After you introduce yourself, provide an overview of the project. This is your first opportunity to describe what you're hoping to accomplish and the areas of expertise you're looking for. Think of this section as a way to help vendors better understand your priorities so they can tailor their proposals accordingly.

I'd recommend keeping this section clear and concise. Focus on the purpose of the RFP, the type(s) of vendors you're looking for, and your goals. You'll have an opportunity later to provide specific details about the scope of work later.

Example:

*The purpose of this Request for Proposals (RFP) is to invite businesses who specialize in video production, live action, animation, and multimedia for educational purposes to submit proposals to our company.*

*We're currently seeking qualified vendors to support the development of a public health video series on behalf of TransformNation. Our goal is to build brand awareness, drive web traffic, and increase our YouTube marketing ROI.*

#### **Outline the budget and scope of work**

In the last step, we described the project at a high level. This section is where you can get into the weeds a little bit. State your budget and describe the specific services you need.

For me, it's helpful to compare this section to the "Job Responsibilities" section in a job description. Give a complete snapshot of what the role entails. You can take various approaches when describing the services you're seeking in an RFP, but I recommend incorporating bullet points or breaking up your information so that it's easy for vendors to scan.

Example:

*The budget for this project is \$12,750.*

*The selected firm will be responsible for the ideation, production, and delivery of a three-part video series to educate teens and young adults about the benefits of living a healthy lifestyle.*

*Tasks include but may not be limited to the following criteria:*

- *Ideating video concepts*
- *Writing and editing video scripts*
- *Multimedia (audio/video) content development*

- *Capturing, importing, and organizing raw media*
- *Editing video footage and audio files*
- *Creating static and motion graphics*
- *Adding music, voice-over, and sound effects*
- *Delivering multi-format video files (e.g., YouTube, social media, web)*
- *Meeting the requirements of Section 508 Compliance for video*
- *General account management*
- *Other assistance as required*

**Call out any barriers or roadblocks**

Here, you'll want to mention any challenges specific to your project. This may include elements like limited resources or specialized requirements that the average vendor may not have or easily obtain.

This may seem counterintuitive, but I've found that this helps you eliminate unsatisfactory bidders and figure out which vendors have the skills to tackle those challenges.

It's crucial to be transparent here. Otherwise, vendors may not fully understand the potential difficulties that may arise. This lack of knowledge could lead to delayed timelines, increased costs, or worse — an unsuccessful project.

Example:

As a federal entity, TransformNation requires all materials, including multimedia content, to meet the requirements of Section 508 Compliance. Vendors must have specialized knowledge in 508-Compliance for video production.

**Highlight your selection criteria**

Now it's time to specify which skills, services, and market expertise are required for consideration. This is the time to get specific, just like we did in the scope of work section. Some examples of selection criteria that you can specify in an RFP are experience, qualifications, cost, availability, and technical compatibility.

When building out this section, focus on the objective criteria that your business will use to, well, pick a winning bid. A clear selection criteria helps increase your chances of receiving proposals that actually meet your needs.

Example:

*The ideal vendor:*

- *Has experience in producing high-quality videos across various formats such as live-action, animation, screencast, whiteboard, and educational video*
- *Has a clear process from ideation, production, revision, and final delivery*
- *Has experience creating videos for educational purposes (public health knowledge and experience is a plus)*
- *Has demonstrated knowledge in the requirements of Section 508 Compliance*
- *Can provide a highly responsive, collaborative, and transparent communication process*

**Specify your submission process**

The selection criteria and the submission process outline go hand-in-hand to ensure you end up with a strong collection of proposals.

Tell vendors where to submit their bids and to whom, and give them a timeline that includes the submission deadline, date for final selection, and project completion date. Then, tell them exactly what you want them to submit.

Treat the submission process as a test for who's capable of meeting your requirements. If a vendor can't complete all elements of your proposal, you probably can't trust them to finish your project, either.

Example:

*Submission Information*

*Submissions may be sent via mail or electronically by the submission deadline.*

- *Project Name or Description: Video Production Services*
- *Company Name: AJC Health*
- *Address: 123 Howie Ave.*
- *City, State, Zip Code: Silver Spring, MD 20906*
- *Procurement Contact Person: Alana Chinn*
- *Telephone Number of PCP: 123-456-7890*
- *Email Address of PCP: achinn@consulting.com*
- *Fax Number: N/A*

### *Submission Timeline*

*Proposals must be submitted by February 10th. The award will be granted no later than March 1st. Final video delivery must occur by June 30th.*

### **Submission Criteria**

A submission must, at a minimum, include the following elements:

- Description of the firm that includes a general overview, names and credentials of creative team, number of full-time employees.
- A one-page narrative outlining the firm's strengths and distinguishing skills or capabilities as they might relate to AJC Health.
- A representative selection of multi-channel video content, audio samples, and project management plans created for current and past clients.