[TEMPLATE]

REQUEST FOR PROPOSAL

[Insert Your Organization’s Logo]

**[NAME OF YOUR ORGANIZATION]**

**[ADDRESS]**

**[WEBSITE URL]**

**[DATE OF ISSUE: XX/XX/XXX; PROPOSALS DUE: XX/XX/XXXX]**

# I. Organization Background

*Include a* ***brief*** *history of your organization to give vendors a general idea of what you do and who you serve.*

[DESCRIBE YOUR ORGANIZATION IN 2-5 SENTENCES AND INCLUDE YOUR WEBSITE URL FOR MORE INFORMATION.]

# II. Project Overview

*Give a* ***brief*** *introduction about the project so vendors can decide whether they want to bid.*

[DESCRIBE PROJECT OVERVIEW IN 1-2 PARAGRAPHS/A FEW SENTENCES.]

# III. Project Goals

*Be specific about what you want to accomplish and how you will define success. Include at least one goal but no more than three.*

**[EXAMPLE]** The goals of this project include:

I. [INSERT ORGANIZATION GOAL #1]

II. [INSERT ORGANIZATION GOAL #2]

III. [INSERT ORGANIZATION GOAL #3]

# IV. Scope of Work

*Include the details of the project, commonly referred to as the “scope,” “scope of work,” or abbreviated as “SOW.” Be specific about your needs and tasks that need to be performed. When possible, quantify your needs.*

**[EXAMPLES]**

* Prepare 3 meals a day, 7 days a week that meet the 2020-2025 Dietary Guidelines for Americans and Older Adults.
* Coordinate one evidence-based falls prevention class/workshop per month for older adults and their caregivers.

[EXPLAIN THE SCOPE OF THE PROJECT, IDEALLY IN BULLET POINTS.]

# V. Deadline

*When is the final project due? Are there specific milestones along the way that need to be met? Include this information in your RFP so vendors can determine whether they have the resources and availability for the job.*

Due Date for Each Milestone: [IF APPLICABLE, LIST EACH MILESTONE AND THE DUE DATE]

Final Project Due: [INSERT DATE]

# VI. Existing or Potential Roadblocks or Technical Constraints

*Be clear about any existing or potential barriers to success, such as time, resources, or other constraints that could affect the project. For example, are you dealing with limited staff or outdated technology? By listing these issues up front, you’ll be more likely to eliminate vendors who can’t — or don’t want to — take on your project.*

*Remember, it’s better to find out this information in advance than after accepting a bid and starting work with a vendor.*

[OUTLINE EXISTING OR POTENTIAL ROADBLOCKS OR TECHNICAL CONSTRAINTS.]

# VII. Budget

*Have a specific budget or, at a minimum, an estimated range, and ensure that money is set aside versus having to secure the funds after you’ve selected a vendor. If you don’t know how much your project will cost, research. Talk to people in your network who have done similar projects or contact a few vendors (at least three) and ask them what they would charge.*

*Being upfront about your budget ensures that you’re more likely to receive proposals that are within your budget versus receiving an amazing proposal…that you don’t have the budget for. Providing a budget also eliminates vendors who don’t bid on projects below a certain amount.*

*Think of your project budget like buying a home. Everyone needs to know what they can afford to spend before embarking on the home-buying process.*

[LIST BUDGET OR BUDGET RANGE.]

# VIII. Evaluation Metrics

*Explain to the vendor exactly what you expect from them in their proposal. In addition, explain how you will score or rate submissions, and how you will use those scores to decide who is the best fit for your project. No detail is too small. For example, if you prefer past performance that has occurred only within the last three years, note that in this section.*

**[EXAMPLE]** [YOUR ORGANIZATION] will evaluate bidders and proposals based on the following criteria. The potential points for each criterion are shown in parentheses.

* Vendor’s previous experience/past performance history (25 points)
* Samples and/or case studies from previous projects (15 points)
* Staff experience and expertise (35 points)
* Projected costs (25 points)

# IX. Submission Requirements

*Are there specific guidelines a vendor must meet to be considered? If so, list them.*

**[EXAMPLE]** To be considered, vendors must adhere to the following guidelines. Only vendors who meet all [INSERT NUMBER] metrics in the evaluation section should submit a proposal.

* Vendors interested in submitting a proposal should contact [INSERT NAME AND EMAIL] no later than [INSERT DATE] regarding their intent to submit a proposal.
* Proposals must be received by [INSERT CONTACT NAME] via email/postmarked by [INSERT DATE]. Proposals received after the deadline will not be considered.
* Vendors must include [INSERT NUMBER] work samples and [INSERT NUMBER] references in their proposal.
* Proposals should be no more than [ENTER NUMBER] pages. Failure to comply with this guideline will result in automatic rejection.

# X. What We’re Looking For in Potential Vendors (OPTIONAL)

*To help reduce or eliminate surprises, be specific about what you’re looking for from your vendor. For example, explain what kind of communication or work ethic you seek.*

[DESCRIBE YOUR IDEAL VENDOR.]

# XI. Contact Information

*Include a point of contact for vendors who have questions.*

For questions about this RFP, please contact: [CONTACT NAME, EMAIL, PHONE NUMBER]