

# MODEL REQUEST FOR PROPOSALS (RFP) TEMPLATE

Generalized for professional services



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On the following pages, items shown in **blue font** need to be replaced with the organization's own information. Items shown within brackets [ ] are intended as instructions to people using the form.

[Your organization should use its own standard title page and cover letter to transmit an RFP to potential vendors. At very least, the cover page should identify your organization, state the nature of the RFP, and show the RFP issue date.]

**ABC Charity, Inc.**  
**Request for Proposal (RFP)**  
**Professional Services**  
**Date Issued: Month Day, Year**

**1. NOTICE TO VENDORS**

With this Request for Proposals (RFP), ABC, Inc. solicits proposals from vendors to perform professional services and provide products, including [Insert here: A brief, general description of the types of services your organization is seeking]. In issuing this RFP, ABC, Inc. makes no commitment to contract for work with any vendor(s) responding to this RFP, either within the dates specified in the RFP or at any other date(s). ABC, Inc. will not reimburse vendors for any expenses or pay for any implied services associated with responses to this RFP – vendors choosing to respond to this RFP must do so entirely at their own expense. ABC, Inc. agrees to maintain all vendor proposal materials as private and confidential and not to display or disseminate them to any individuals other than those evaluating their contents for purposes of this RFP. All proposals and collateral materials submitted in response to this RFP become the property of ABC, Inc. and will not be returned to vendors.

**2. RFP INTRODUCTION**

**2.1 RFP Purpose**

With this RFP, ABC, Inc. solicits proposals from vendors for the purposes of [Insert here: A statement of what is to be accomplished by the vendors in their task]. Following the evaluation of replies to this RFP, ABC, Inc. may select one or more vendor agencies to provide its desired services.

**2.2 Schedule of Events**

This following schedule of events should be considered definitive. ABC, Inc. reserves the right, however, to adjust any of these dates as necessary to meet its needs. In the event any of the dates are adjusted, ABC, Inc. will send information about the date changes to all vendors to whom this RFP originally was distributed, plus any other vendors that have made their interests known to ABC, Inc.

- |  |      |
|--|------|
| a) Formal release of the RFP   | date |
| b) Bidder's pre-proposal-submission conference   | date |
| c) Last day to submit questions or comments  | date |
| d) Release of RFP revisions, answers to questions and additional comments by ABC, Inc. | date |
| e) Proposals due to ABC, Inc. by 5:00pm  | date |
| f) ABC, Inc. invites selected vendor(s) to make presentations                          | date |
| g) ABC, Inc. begins formal decision and negotiation period                             | date |
| h) ABC, Inc. announces final contract award decision(s)                                | date |
| i) Desired date for start of vendor contract   | date |

Following step f) above, ABC, Inc., at its discretion, reserves the right to request one or more vendors to submit a "best-and-final-offer," which may involve targeted changes to

## **Request for Proposals to provide professional services**

the requirements stated in this RFP. In this event, the dates for steps g) and h) above will be modified to allow time for the best-and-final-offer to be prepared.

### **2.3 Issuing Authority**

This proposal was issued directly by [ABC, Inc.](#), which also will collect and evaluate all proposal responses.

[If your organization has hired an agent or consultant to write this RFP, collect proposal responses, and/or evaluate or assist with the evaluation of proposals, you should reveal that with an insert here: Name of agent or consultant, and the role being played by that agent or consultant in this RFP process.]

### **2.4 Special Terminology and Definitions**

[Insert here: An alphabetical list of words and phrases that have special meaning to your organization, or that may otherwise be misconstrued by potential vendors.]

## **3. BACKGROUND ON ABC CHARITY, INC.**

### **3.1 Mission**

[Insert here: Information explaining your organization's mission, the services you provide, your constituents, etc.]

### **3.2 Brief History**

[Insert here: A brief history of your organization, with emphasis on your growth and patterns as they affect this desired service.]

### **3.3 Current Situation**

This section of the RFP explains [ABC, Inc.](#)'s existing situation with respect to the requested services.

#### **3.3.1 Incumbent Agencies and Ancillary Vendors**

[Insert here: Information about your organization's history with the services being requested, and whether and how your organization currently engages in the services in question. If you have one or more service agencies (internal or external) that currently support your efforts, state that, and also reveal whether or not existing service agencies will be allowed to respond to this RFP. If you have multiple agencies assisting with various aspects of this service, state what they are, which of them will stay in place, and which may be replaced. Name the vendor(s) which is (are) providing key auxiliary services, to which the requested services will need to relate. Reveal whether responders are expected to recommend other such auxiliary vendors, and whether such services are requested as a part of the proposals. ]

#### **3.3.2 Current Service Program Considerations**

[Insert here: Information on current practices with regard to the services being requested. If your organization currently receives these services, or performs them with internal resources, describe this. Note that section 3.3.1 is used to identify the service

## **Request for Proposals to provide professional services**

providers, while this section is used to describe important considerations about the services per se.]

### **3.3.3 Internal Support Staff**

[Insert here: Information about the internal staff who do, or are planned to, support, coordinate, or manage these services and service providers, their locations and duties, and how they do or will interact with the service providers. The role of your internal program manager is of particular importance.]

## **4. GOODS AND SERVICES DESIRED**

ABC, Inc. seeks a vendor to deliver [Insert here: Comprehensive general description of services your organization is seeking from the vendors.]

### **4.1 List of Deliverables**

Pursuant to this work, ABC, Inc. expects to receive the following specific deliverables: [Insert here: List describing services and service products your organization is seeking from the vendors. For each item, include description, functional and performance specifications, scope of work, critical dates, and relevant time constraints, as appropriate and relevant.]

### **4.2 Program Management and Administration Considerations**

In support of the products and services described in this RFP, ABC, Inc. requests the following management considerations:

[Insert here: List describing management requirements your organization is seeking from the vendors. Be sure to indicate time constraints you anticipate for the contract, such as a specific contracting period or length of time. As other examples, you may wish a 100-percent dedicated Account Executive, 24-hour telephone access to technical assistance, one or more staff to be physically located at your facility, real-time access to program performance statistics, documentation of competitive bidding for associated materials or services, contingency planning, or assurances of backup and recovery capabilities. For items that are required (rather than simply desired), you should consider adding them to the list of Contractual Requirements at 5.4.]

### **4.3 Vendor Responsibilities**

In addition to managing its own work and successfully delivering all the required products and services described above, ABC, Inc. believes the vendor will have these general responsibilities:

[Insert here: List describing additional activities for which the vendor will have responsibility.]

### **4.4 ABC, Inc. Responsibilities**

ABC, Inc. believes that it will have these general responsibilities:

- To respond to all email and telephone communications from vendor within one business day

## **Request for Proposals to provide professional services**

- To provide convenient and fully equipped work space, telephone and Internet access, and copying and duplication facilities for vendor staff while they are working on-site at [ABC, Inc.](#)
- To provide access to all staff resources that vendor needs access to in order to perform this work
- To provide adequate meeting spaces for vendor staff and [ABC, Inc.](#) staff

[Insert here: Additional items describing additional activities for which your organization will have responsibility.]

### **4.5 Performance and Outcome Standards**

[Insert here: Special information or requirements you wish to connect to this work that will relate to measuring vendor performance or outcome impacts. This is especially important if vendor payments or performance bonuses will be conditional upon these measures.]

## **5. PROPOSAL REQUIREMENTS**

### **5.1 General Instructions**

#### **5.1.1 Format**

[Insert here: Any instructions you wish to provide relating to the appearance of the proposal.

For large proposals, with many replies expected, it is easier to evaluate the proposals if they all come to you in the same format. In this section, you can provide a complete proposal outline that you either recommend or require vendors to follow for their proposals. You may also simply give a list of required content, with or without page number restrictions.

If you specify a page limit for proposals, be sure to indicate whether the page limit includes or is exclusive of proposal components such as cover page, table of contents, figures, tables, sample materials, attachments, and so on.

To make it easy to read and evaluate, you should require all proposals to have: 1.0- or 1.25-inch left and right margins, 1-inch top and bottom margins, 12- or 14-point typeface using only Arial or Times Roman fonts, and consecutive numbering of ALL pages, with the exception of attachments

Sometimes, it is an advantage to have parts of proposals separately bound. For example, you may wish to evaluate service methodology separately from considerations of financial costs and benefits. If that is the case, this is the place to state separate binding and formatting instructions. If you expect to have different people evaluating different parts of the proposal (e.g., separate evaluation of the budget or contract), it helps to require either separate bindings, or types of binding (e.g., three-ring notebook) that make it easy to separate the proposal into component parts for distribution to different readers.

## **Request for Proposals to provide professional services**

If you expect electronic documents, specify all proposals to be submitted in a “write-protected” format, such as a pdf file or a Word file that is locked against modification with a password.]

### **5.1.2 Proposal Submission Instructions**

[Insert here: Instructions on how to package the proposal, where and when to deliver it, and in how many copies. Specify if you want to require an electronic file delivered instead of or in addition to hard copies.]

### **5.1.3 Inquiries**

All suggestions and inquiries pertaining to this RFP should be addressed to:

(Salutation) (First Name) (Last Name)  
Formal Job Title  
Address  
Telephone Number (Times to phone)  
Email Address

Suggestions and questions about the RFP may be sent via post or email to [ABC, Inc.](#) until [Month Day, Year](#), and after that date, no further comments or inquiries will be accepted. Answers to all questions will be distributed to all vendors as quickly as possible. [ABC, Inc.](#) reserves the right to modify the RFP based on these comments and questions, as well as its own predilections, up until [Month Day, Year](#). All final RFP modifications will then be distributed to all vendors.

## **5.2 Pre-proposal Bidders Conference**

[If your organization is holding a pre-proposal bidders conference, Insert here all the information vendors will need to know. Information will include:

- Date, time and place
- Whom to contact, by what date/time, to RSVP if a vendor plans to attend
- Whether attendance is required or optional for bidders
- Whether you encourage or require questions to be submitted in advance – and if so, deadlines and process for submitting questions
- Other information you may wish to provide about what will take place or be provided at the conference]

## **5.3 Proposal Content Requirements**

Proposals are expected to be responsive to all the questions and considerations raised throughout the RFP. An agency’s failure to provide sufficient information on, or conformity with, any item within this RFP may be sufficient cause for [ABC, Inc.](#) to reject any further consideration of that agency’s proposal.

### **5.3.1 Point of Contact**

Provide the name and full contact information of a single individual for purposes of communications related to receiving and evaluating your agency’s response to this RFP,

## Request for Proposals to provide professional services

### 5.3.2 Statement of Work

The vendor must provide a complete explanation of the policies, processes, tools, resources, procedures, schedules, reports, etc. that will be used to deliver the desired goods and services as described in, and covering all questions raised in, section 4 of this RFP.

### 5.3.3 Change Control Process

The vendor will propose a comprehensive process for proposing and controlling changes to the proposed work processes, products and service requirements, and their associated time and budget constraints.

### 5.3.4 Staffing

The vendor must name a specific person who will act in the capacity of Account Executive for [ABC, Inc.](#) For this person, the proposal must include:

- A detailed biography or resume
- A job description for the person vis-à-vis this contract
- A chart showing the person's place in the vendor's organization
- Identification and functional description of this person's manager or superior
- Office physical location and mail address
- Estimated percent of this person's time that will be dedicated to this account
- Names of other client accounts or major internal assignments this person would be involved with and in what capacity, during the tenure of this work

[If the anticipated work will require significant staff in functions other than AE, you may also specify those staff functions here, and require the same information as above for these people.]

The proposal must identify, at least by job function, other agency staff who will assist the Account Executive in successfully performing the work on this contract.

If vendor will be making use of subcontractors, the key person for each subcontractor should be identified and a bio or resume should be provided.

### 5.3.5 Agency Description

The proposal must include:

- A brief history of the vendor's organization
- Current agency descriptive information
- Full disclosure of agency ownership details
- A list of the vendor's five largest (by work volume) current clients
- Names, addresses, telephone numbers, and email addresses of at least one previous and four current clients, whom we may contact for references
- Names of ALL other current or recent clients engaged in programs closely similar to those of [ABC, Inc.](#)



## **Request for Proposals to provide professional services**

### **5.3.6 Management and Quality Assurance**

Your proposal must explain the management processes your agency uses regularly to ensure that the products and services you provide are timely, correct, consistent, complete, and high in quality. Please explain any policies you have related to warranties of your work, and how those policies are implemented and enforced. Explain the avenues of recourse [ABC, Inc.](#) will have in the event it is not pleased with the services and products it receives from you.

### **5.3.7 Samples of Previous Work**

As an attachment to the proposal, please submit one or two case-history examples of materials and services prepared for current or recent clients, similar in nature to what you are proposing for [ABC, Inc.](#) If possible, please prepare or modify these attachments to protect their confidentiality and hide your clients' identities. These materials will be kept confidential and they will not be returned.

### **5.3.8 Affirmations**

Your proposal must affirm ALL the following statements. In doing so, please provide any required information. You must explicitly reveal and explain any exceptions to or deviations from these statements.

- a) Your agency is properly registered and/or bonded in all states where that is required in order for you to provide your services and/or sell your products.
- b) Neither your agency, or its officers, directors or owners, nor any current client of your agency has any state, federal, internal revenue, postal, or federal trade commission criminal enforcement actions pending against it, nor have any of these organizations or individuals had such an action pending or current in the past 36 months to the best of the knowledge of any officer, director or owner of your agency.
- c) Your agency or your principals and owners have the following affiliates which are partially or wholly owned by your agency or your principals and owners or with which your agency deals, other than completely "at arms length." (List \_\_\_\_\_ )
- d) Of the preceding list of affiliates the following are proposed as subcontractors under your agency's proposal to [ABC, Inc.](#) (List \_\_\_\_\_ )
- e) Your agency agrees that before entering into any contract with [ABC, Inc.](#) it will be required to agree not to enter into any agreements or understandings of any type or description with any current vendors or subcontractors to [ABC, Inc.](#) which would provide commissions, finders fees, discounts, or any form of compensation or benefit to your agency or to any third party (including officers, directors or staff of [ABC, Inc.](#)) other than directly to [ABC, Inc.](#) except as specifically approved in writing by [ABC, Inc.](#)

### **5.3.9 Signature**

Your proposal must be signed by an owner, principal, officer of the corporation, or another person who is legally authorized to enter into agreements on behalf of your agency.



## **Request for Proposals to provide professional services**

### ***5.4 Price Proposal, Fees, Expenses, and Expected Returns***

The proposed pricing of vendor agency products and services must reveal and encompass all anticipated expenses.

#### **5.4.1 One-Time Setup Costs**

The vendor must provide complete, detailed estimates of and information on ALL the one-time setup costs that [ABC, Inc.](#) will incur pursuant to this work. The timing of these costs must be clearly indicated. These include both costs to be paid to your agency and costs to be paid to others.

#### **5.4.2 Ongoing Fees and Costs**

Your proposal must include complete, detailed information on ALL ongoing fees that will be incurred for the proposed products and services.

If you wish to propose services based upon a monthly management fee, summarize all aspects of what the fee will include and what additional expenses will be required as separate charges.

If you wish to propose fees based upon itemized expenses, summarize all the items that will be included therein and provide your estimates of what a “typical” billing would be.

If you are doing any pass-through billings from suppliers or subcontractors, your proposal must show what those are, along with estimates of a “typical” billing period, and complete disclosure of your company’s related markups and commissions, if any.

If any other related products or services will be required (or strongly preferred) to enable or supplement those from your agency, which will NOT be included in this proposed package, you must identify what those are, explain why your agency chooses not to provide them, and recommend how [ABC, Inc.](#) should best procure those products and services.

Your proposal should fully explain optional, additional, special, and alternative products and services, which are related to but not necessarily required for those proposed by your agency, which your agency can recommend or make available to [ABC, Inc.](#), along with the financial and non-financial benefits or reasons for [ABC, Inc.](#) to choose those options. Estimate and explain the costs of these options.

### ***5.4 Contractual Requirements***

[Insert here: All information or considerations you wish to have included in a contract, including all special or organization-unique terms and conditions. If you have a standard contract you want the vendor to accept, state that here and include it as an attachment to the RFP. Also explain the vendor’s options (if any) to modify the contract or certain clauses within it. You should specify that the vendor’s proposal (with all subsequent modifications and attachments) will be a required addendum to the contract, and that negotiated departures from the language of the proposal must be stated explicitly in the

## Request for Proposals to provide professional services

contract. Other key information you should have in a contract includes (but is not limited to):

- Identification of primary contact people for all communications related to the contract
- Key staff provisions
- Provisions for data ownership and intellectual property rights
- Agreements on privacy and confidentiality
- Agreements on exclusivity
- Agreements not to hire each other's staff
- Invoicing terms and payment schedules
- All fees and contingency fees
- Provisions for reimbursement of expenses
- Warranty provisions
- Staff hours of availability (both directions)
- Provisions for making changes to the contract
- Consequences for nonperformance
- Insurance, indemnification, and bonding requirements
- Conditions and procedures to terminate the agreement]

### **5.5 Proposal Evaluation Criteria**

ABC, Inc. intends to enter into a contract with the vendor(s) that provide ABC, Inc. the best value and benefit, not necessarily on the basis of the lowest price quoted.

[Insert here: A detailed explanation of how the winning proposal will be selected. A common and easy way to do this is to create a list of important proposal aspects and the possible points to be awarded for each, totaling 100 or 1000 points. Be aware that vendors will write their proposals in order to maximize their point counts. This means they will provide much information for proposal attributes that might yield high point counts and little or no information for attributes that have low or nonexistent point counts – so be sure to design the evaluation criteria accordingly. You will get what your evaluation criteria ask for. The level of detail to which you drive down your point breakdown is up to you.

Here is an example of a fairly detailed evaluation scheme:

To select the winning vendor, ABC, Inc. will use the following evaluation method.

1) Threshold Criteria – Before judging proposals on their merits, ABC, Inc. will eliminate all proposals that fail to meet these criteria:

- Adherence to submission instructions (including deadlines)
- Adherence to format guidelines
- Responsiveness to all questions and issues raised in this RFP
- Positive fulfillment of all the Affirmations (section 5.3.8)
- All contractual terms agreeable to ABC, Inc.

## Request for Proposals to provide professional services

2) Merit Criteria – ABC, Inc. will award merit points to each proposal. A proposal can earn up to 1000 points. The evaluation criteria and their point values are these:

2A) Organization background, reputation, stability (250 points). Factors that will be included in this criterion are:

- Successful history of business and ethical reputation (45 points)
- History of successful prior work in our area of concern (45)
- Reports from references (45)
- Control relationships to subcontractors (if any are needed) (45)
- Financial stability (45)
- Miscellaneous extras (25)

2B) Pricing (350 points). Factors that will be included in this criterion are:

- Overall cost of work (setup and ongoing) (100 points)
- Reasonable markups and commissions (45)
- Presentation of options (35)
- Realistic estimates (45)
- Clarity of budgets and plans (35)
- Completeness of financial considerations (45)
- Miscellaneous extras (45)

2C) Agency approach (400 points). Factors that will be included in this criterion are:

- Project approach and methodology (80 points)
- Proposed staffing (55)
- Quality and appeal of work plans and processes (70)
- Management and QA plan (65)
- Creativity in approaching our needs (50)
- Quality and appeal of sample materials (50)
- Miscellaneous extras (30) ]