

# 12 Tips for Writing a Successful RFP

by Kevin Keegan

Many people probably think that writing a request for proposal (RFP) ranks right up there with a trip to the dentist. It's just not one of those fun things that people like to do. But like the dental visit, it's an important exercise that may ultimately alleviate pain in the long run.

The RFP process is not an end in itself, but rather a means of making the process for selecting a service provider more efficient and effective. It provides a structure for discernment, evaluation, and selection that will save you and your institution time, money and aggravation.

For many campus administrators, issuing an RFP is also a statutory or regulatory requirement that must be followed. Successful compliance with all proposal requirements is mandatory in order for the selected bidder to have the authority to operate on your campus.

As with any publicly circulated document, an RFP reflects either positively or negatively on the issuing institution and its author. If well written, it reflects positively. If poorly written, it raises the specter that the institution may not be the place to work, potentially resulting in more qualified firms electing to keep their distance. If they do respond, you may get an off-the-shelf, generic response that requires little investment on their part and really doesn't address your needs.

Which factors should be considered when writing an RFP? The following 12 points are offered as suggestions for ensuring a properly constructed document:

1. Define which outcomes the institution wants from the RFP process. Seemingly obvious, it's very common for there to be some disconnect about the process among the institution's leadership. Ensuring that everyone in the leadership chain is on the same page is crucial. Important steps include:
  - defining and agreeing upon the business plan for the service area or function being requested,
  - outlining the desired outcomes for the RFP process,

- identifying the institutional drivers for engaging in the process,
- setting the process's timetable, and
- allocating the appropriate institutional resources (financial and human) to the project.

Successfully completing this step will increase buy-in for the process at all levels and reduce the likelihood of issues popping up down the road that might derail the effort.

2. Recognize your limitations. Most administrators don't write RFPs or manage the procurement process on a regular basis. Consequently, as with any skill-set that requires practice, it's hard to get good at it. If you lack the time, human resources, or expertise to successfully execute the process, it might be advisable to hire a consultant who could assist with-or even manage-the entire process on your behalf. Although an additional expense, the right consultant can bring considerable expertise to bear on your project and save a substantial amount of distress later on. As a result, the cost of a consultant should not be an immediate turnoff. Because of their increased efficiency, as well as the opportunity costs of you not being able to concentrate on your core business, it may actually be cheaper to go the consultant route.
3. Do some homework before sending out the RFP. Reviewing proposals from unqualified bidders is a waste of time so researching viable vendors is a crucial exercise. How do you find out who's qualified? There are numerous methods including:
  - talking to colleagues,
  - asking for information on listservs to which you subscribe,
  - using professional associations,
  - networking at conferences,

- visiting other campuses that have similar services,
  - contacting prospective bidders to pre-screen their qualifications,
  - checking out who has been in business for a while,
  - investigating what vendors support the professional associations to which the service unit belongs, and
  - seeking the advice and counsel of consultants who operate in the field.
4. Spell out vendor expectations and requirements succinctly and clearly. Think through what your expectations are of prospective bidders and then ask for the information in clear, concise language. State that you expect the same type of candor in the bidder's response. There is a misperception that RFPs need to be long to be good. Not true. Just like with freshmen term papers, length doesn't guarantee you an "A". Length isn't always bad, however. Depending on the service or function being solicited, the size and complexity of the institution, and bidding requirements mandated by governmental or regulatory entities, the document may get quite large. However, the important consideration is that regardless of length, the expectations are spelled out in clearly defined terms that cannot be misinterpreted. Don't bury your salient points in the document, creating a "Where's Waldo?" – type of exercise for bidders to navigate. If necessary, a glossary or definition of terms should be included in the document to reduce the likelihood of confusion. An RFP document has legal, operational and financial implications so it must be clearly written and comply with (and not contradict) any existing institutional policy.

As stated earlier, as a publicly circulated document, the RFP reflects either positively or negatively on your institution. Bidders will draw conclusions about your professionalism based on the document they have in their hands. Make sure it puts your institution's best foot forward. As simple as it may sound, have others proof your work to ensure that you've accurately communicated your main points.

Similar to what you would do when hiring a new employee, clearly spell out bidders' minimum qualifications. Be clear with them about what you hope to achieve through the RFP process AND what your vision for the future is once the successful vendor is on campus. Explain your standards of conduct. By communicating your high expectations from the very beginning, bidders know what to expect and can act accordingly. Also spell out what is unacceptable on your campus (i.e. inappropriate contact with administrators, sending gratuities, engaging in discriminatory practices, paying low wage rates, engaging in anti-collective bargaining activities, etc.) so there is no confusion on these points as well. Finally, lay out your non-negotiables. If you or your institution won't

budge on certain issues, explain these terms to the bidders at the outset.

5. Disclose pertinent information in a forthright and honest manner. Institutions expect vendors with whom they deal to be upfront and honest. In order for the business relationship to work, prospective vendors should expect the same behavior in return. If there are issues that you know will affect a vendor's interest in your school or its success once on your campus, spell them out. The financial, operational, physical and human conditions of the enterprise should be disclosed so bidders can make an intelligent and well-informed assessment of your operation. As Jim Collins stated in *Good to Great*, organizations must confront the brutal facts facing them if they are to improve. How can you expect a prospective vendor to be successful on your campus if it's kept in the dark on key issues? Why not engage them in your problem-solving activities? They are professionals who probably have experience with similar issues at numerous campuses. Take advantage of this expertise; it's a major reason why institutions use contracted services.
6. Be specific about what you want sent to you for review. RFP responses can often look like dissertations on steroids: they end up being large and bulky documents. A lot of unnecessary clutter gets inserted in them because the bidder is afraid to leave anything out. The volume of material is often unnecessary and detracts from the main purpose of the RFP process, which is to find solutions to a specific campus issue. Unless you want to look through volumes of materials, ask bidders for specifics. Outline the order in which you want the information organized. This will reduce your search time when looking for specific information since you'll be able to flip directly to the relevant section. If bidders don't follow your instructions, this may be an indication that they haven't reviewed your proposal carefully enough—a tell-tale sign when considering which firm to hire.
7. Set a realistic timetable. To be done correctly, the RFP process takes time so make sure your timetable is realistic. Prospective bidders need time to:
  - review your proposal,
  - develop their response strategies,
  - seek clarity on any questions they have about the proposal,
  - make cost-effective travel arrangements to your campus, and
  - perform their own due diligence activities on your institution.

Similar to sending out a poorly constructed RFP, an unrealistic timetable sends up a yellow flag to bidders that the institution may not have its act together. They may

assume that this is how you do business and will take a pass on your project. Rarely do opportunities that benefit from an RFP spring up at the last minute. The process should be predictable so allocating the appropriate time shouldn't be a problem. Also, don't underestimate the amount of time it will take to review and compare responses, particularly if numerous administrators or committee members need to be engaged in the process.

8. Make available a responsible on-campus representative who can answer prospective bidders' questions about the RFP. Communication is key to a successful business relationship, and it should begin with the RFP process. As mentioned earlier, bidders will make information-driven decisions about your school so it's important that they have access to relevant data. While institutional data (enrollment information, financial statements, fact files, etc.) are important, it's also crucial that bidders understand your campus culture, layout, challenges, mission and values. Two ways they can build this understanding are campus visits and administrator interviews. While you don't want bidders monopolizing your time simply to lobby on their behalf, you also don't want to ignore their legitimate needs for access and information. The more you share, the more comfortable you can be in knowing you met your obligation to be honest and forthright. As a result, a vendor won't get away with complaining later about being left in the dark on important issues. The more familiar bidders are with your campus, the better they should be able to respond to your needs. Two notes of caution: Make sure all bidders know that if they want access, they must go through the designated front door; you don't want them bothering other people on campus. Secondly, all bidders must have equal opportunity on your campus; no preferential treatment should be given.
9. Clearly outline the evaluation criteria. Let bidders (and your internal review team) know how the responses will be evaluated. Be as specific as possible. Prepare a scoring sheet by which they will be assessed. Make sure everything you plan to use for evaluating bidders is asked for in the RFP. Reinforce the point that you must see answers to the evaluation criteria and not simply extraneous material inserted to fill up the binder. The more detailed and thorough the outline, the less follow-up will be required down the road.
10. Encourage prospective bidders to offer creative solutions to your service issue. Discovering new and creative ways of doing business is one of the primary reasons for engaging in the RFP process. Don't limit vendors' imagination by imposing a lot of pre-determined conditions.

Why engage in an RFP process if you aren't interested in discovering better ways of operating? Allow respondents to be creative, and be open to solutions you hadn't previously considered.

11. Vendors should be partners, not servants. The most successful vendor/client relationships are those that are mutually respectful and financially successful. As in any relationship, if one side holds all the clout, then the other side will feel disadvantaged. Communicate to your bidders your willingness to help manage the enterprise for the mutual benefit of both parties. While you should certainly expect hard work from them, their success should not hinge on whether they receive institutional support. After all, it probably makes little difference to the consumer who provides the service; he or she simply wants a quality experience. Anything done at your school has your name on it even if it's provided by a third party. It's a disingenuous approach to customer service to attempt to distance yourself from the service provider.
12. Demonstrate enthusiasm for the RFP process. Create excitement for your project in your writing and speaking. Let bidders know that this is an important exercise and you're charged up about the prospect of them helping improve your institution. Remember, the bidders are passionate about their work since it's what they do for a living. Although it may not be your passion, it's important that they know you'll be a solid partner who has a real interest in their success.

The ultimate goal of the RFP process is to attract and retain the most qualified, cost effective vendor who can provide exceptional service to your campus community. All activity should be conducted with that goal in mind. Sweating the details is important. Focus on the fundamentals and not the frills and ensure that your approach is practical and your paperwork precise. Finally, make sure your evaluation criteria compare apples-to-apples so everyone knows the process was objective and above board. ♦



**Kevin Keegan** is a Vice President with Brailford & Dunlavy, a nationally known facility planning and program management company. He has 20 years of experience in auxiliary services administration at private colleges and universities. Prior to joining B&D, he served as Associate Vice President of Student Affairs at DePaul University, where he was responsible for student housing, food service, campus recreation, university bookstores, student centers, indoor and outdoor athletic facilities, conference services, and vending operations.