The RFP Process

Over the years I have been on both sides of the Request for Proposal (RFP) process and have made my share of mistakes; but every time I wrote a RFP or received one I got a little better in the process. The #1 reason the RFP process does not proceed well or have an acceptable outcome is the lack of detail in the documents. There are two basic types of RFPs:

1. Where you are planning to contract a service
2. Where you are planning to contract some type of project to construct buildings or install equipment

Both will have problems if the details are lacking.

In the service contract process the number one reason they fail is the owner doesn’t understand the service they are trying to outsource. In the project RFP the owner fails to document enough detail for the contractor to know what is expected when they are finished. When this happens the contractor must do the best they can with the information they have or don’t have. Often what the contractor thinks should happen doesn’t match what the owner thought they wanted.

The following components are the major ones in the RFP process:

- **Understand what success looks like in the end** - make sure everyone understands what the final product should look like. This must be detailed so everyone on the team understands the expectations.
- **Developing a detailed Scope of Work** - I can’t over emphasize this piece enough. You must know exactly what you want the successful bidder to accomplish once they are onsite working. I would also ask for assistance from other members of the team to review and adjust the scope as needed. The more eyes reviewing the scope the better.
- **Scheduling and Gantt charts** – my favorite and one I required over the years is a detailed Gantt chart is developed for all projects and contracts no matter how simple they seem to be. The Gantt is a very visible and graphic method to view schedules and easily spot conflicts in your schedule.
- **Choosing bidders** – This is not always possible in the public sector but give it a try if you can. The basic rule of thumb is no bidder is allowed to bid on a contract who you feel is not up to the task once the contract is awarded.
- **Bid meetings** – In person bid meetings should always be held and all bidders are required to attend, **no exceptions**. All the details of the RFP process are discussed with accurate notes.
documented and a bid meeting addendum should be communicated to all bidders in a timely fashion.

- **Contract awarding** – contract awarding can be handled on many ways. The normal criteria for making the decision is cost and schedule, both of these must be considered. If the schedule is critical you may have to pay more to accomplish your target dates. I typically only published the order of bidding without shoeing the actual bidding amount. I know that is not always possible in the public sector but I was lucky to work in the private sector where we could make our own rules. Remember you are dealing with companies’ financial success or potential failure, be honest and fair.

So in summary, make sure you use an organized process, understand all of the details and be fair and honest. Here is a PDF version of this topic that I presented with Paul Head from EY at NFMT Orlando 2017 in case you would like to review it: [The RFP Process](#)