



Procurement Excellence Template Series

Results-Driven RFP Template Overview

Authors: Elena Hoffnagle and Kate Mertz

Contributors: Colin Erhardt, Rebecca Graffy, Laura Merryfield, and Hope Patterson

This results-driven **Request for Proposal (RFP)** template toolkit will help state and local governments craft an inviting RFP that attracts quality proposals from vendors focused on improving outcomes for residents.

This template contains all major sections of a results-driven RFP. In each section, supplement and customize our starting language with text specific to your government.

In addition to this Overview, the toolkit contains a fillable RFP template and a fillable RFP Response **workbook and question bank**.

Introduction

We know that for many government staff, writing an RFP can feel daunting. As you face an upcoming need for contracted services, you may be tempted to fall back on a previously issued version of an RFP or simply mimic what a peer city or state has done.

In our work across the country, we have helped state and local governments create greater public value by developing RFPs aimed at improving outcomes. With this RFP template, we offer a tried and tested RFP format that will help your government release an inviting, streamlined, and well-organized RFP. Key features of this template include:

- **Clearly identified outcomes** to be achieved through the contracted service.
- A **logical organizational structure** with project-specific information at the beginning of the RFP.
- **Easy-to-navigate** section headers and table of contents.
- Proposer **checklists** and **response workbooks** to help proposers know what to submit.

While this template offers general best practices and guidance, you should seek guidance from your purchasing office and legal teams around conforming your RFP to jurisdiction-specific requirements.

What types of RFPs are a good fit for this template?

This template is most useful for RFPs that are of high strategic importance, such as contracts that: have not made sufficient progress in achieving desired outcomes, reflect strategic policy priorities for the department or for executive leadership, are for new services or programs, are large in dollar amount or in program reach, or involve a high level of risk.

Solicitations for relatively straightforward procurements – such as the purchase of goods or solicitations where price is the only factor evaluated – may not require the level of detail included in this template.



How should I use this template?

This template contains all major sections of a results-driven RFP. In some sections, you will need to supplement our stock language with text specific to your government (e.g., your government's specific protest process). This document contains the GPL's best practices for writing an RFP, section by section, with a fillable version of the template itself available [here](#).

What other resources are available?

As you develop your RFP using this template, you may want additional guidance on how to craft each section, how to manage the RFP development process and stakeholder needs, or how to take a broader strategic lens to your portfolio of procurement and contracting activities. The GPL's [Guidebook: Crafting a Results-Driven RFP](#) is a complementary comprehensive tool that walks you through the process of creating a results-driven RFP. You'll see links to this guidebook throughout this template.

Introductory Material: Cover Page

On your cover page, provide respondents with all the necessary details clearly and concisely:

- **Issuer details:** The name of the RFP, the name of your department, agency, or division, the name of your government, and the RFP number;
- **A RFP Summary:** a 1-3 sentence summary of the service or program;
- **Response details:**
 - *Pre-proposal conference:* Details about a pre-proposal conference and whether it is mandatory or recommended;
 - *Deadline for questions:* Details about the deadline for questions and the method for submitting them. If applicable, include instructions for how to submit questions via your government's e-procurement system.
 - *Proposal submission process:* Include a brief description of your government's proposal submission process, including the submittal web link.
- **RFP website:** Link to any websites proposers should be aware of to access materials and view updates for this procurement;
- **RFP official contact:** the name, title, and contact information for the RFP contact.

Introductory Material: Cover Letter (Optional)

If your RFP is for a new service or program or is strategically significant, consider including a short cover letter from a commissioner or department head that speaks to the vendor community about the upcoming procurement and your vision. This cover letter may include:

- A **description** of the overall vision for this service or program.
- Acknowledgement of **recent challenges or events** related to the service or program.
- A high-level **summary of strategic direction**, outcome goals, and/or target population.
- A **description of any pre-RFP processes** to gather feedback from residents, service recipients, subject matter experts, and/or the vendor community.
- A statement of the government's **intention to collaborate** with vendors.
- If applicable, mention of an upcoming **pre-proposal conference**.
- **Gratitude** to the vendor community for their interest in the opportunity.

Section 1: The Opportunity

1.1: Summary

Expand on the “Work Summary” on the title page with a *brief* (250–400 words) synopsis of the service or program. Aim for the prospective vendor to know after reading this section whether they’d be interested in the contracting opportunity. Tip: you may want to wait to fill out this section until after the RFP draft is nearly complete.

1.2: Background

General guidance: This section should present essential information proposers need to understand the project, which may include background on the department, service, or program. For simpler RFPs, this section may be a single paragraph, while more complex RFPs may require a few pages. For longer RFPs, consider using sub-headings to organize information or putting additional background information in an Appendix.

[Name of Department or Agency] Overview: Share concise (fewer than 400 words), relevant background information about the departments or agencies involved, including an overview of key aspects of their strategic vision or operations that relate directly to the RFP. Use hyperlinks to direct the reader to relevant websites for additional information.

[Name of Service or Program] Overview: Share concise, relevant background and historical information about the service or program. This section may include:

- A description of how your government has provided this service in the past.
- Any recent major initiatives (internal or external) resulting in service redesign or a shift in demand for the service or program.
- Statistical figures/graphs about the target population or work performed to date.
- For IT procurements, an overview of the current IT environment.

[Needs Statement / Business Challenge / Problem Description] (Choose most appropriate header): Share the problem or business challenge your government seeks to solve through this procurement. This section could include statistical figures/graphs about challenges faced by the population to be served, historical information about the challenge, or any other information that will allow the proposer to understand the problem or the needs you have.

In some RFPs, it may not seem that there is an obvious “problem” or “challenge” to address (e.g., routine janitorial services). In these cases, think about what problem might occur if these services weren’t delivered at a consistently high level of quality.

See [Module 3 of the GPL’s RFP Guidebook](#) for guidance on how to write a strong problem or needs statement.

1.3: Outcome Goals

Include 1–5 **outcome goals** that define for proposers what it looks like to successfully solve the problem. Your goals should describe the changes you expect because of the contract (e.g., to increase usage of local parks through safe and well-run community events). In some cases, your RFP goals will closely connect to government-wide strategic outcome goals. Make sure you aren’t letting program requirements masquerade as goals (e.g., stay away from “our goal is to conduct X activity”). Instead, think about what will be achieved from the activity being conducted.

See [Module 3 of the GPL’s RFP Guidebook](#) for guidance on developing your outcome goals.

1.4: Award Terms

Include the **duration of the contract** and **number/term of renewal options**. Also include the contract type expected (e.g., firm-fixed, cost-plus, not-to-exceed) and information about your budget, which can help proposers to right-size their approach. If relevant, provide any additional information about whether multiple awards will be made.

Section 2: Scope of Work

General guidance: As the central part of the RFP, the Scope of Work should be clear and specific, enabling the Proposer to precisely understand what is being requested and what work activities they will be responsible for if awarded the contract. The Scope of Work will also become the basis for performance standards to be included in the contract. Your Scope of Work should:

- *Connect closely to your goals.* Providing additional context helps the vendor to understand what they will need to do to achieve those goals.
- *Be well-organized and clear.* A clear, logical structure for your scope of work will help the vendor understand what you expect of them.
- *Encourage innovation.* Vendors are often subject-matter experts who can contribute to the design of innovative and cost-effective approaches to achieving your goal.
- *Invite collaboration.* The Scope of Work will set the tone for your working relationship with vendors moving forward. It should create a positive impression of your government as a client and set expectations for how you will work together throughout the project.
- *Be realistic.* Match what vendors can provide with what is attainable given the time and budget.

Important note: Make sure not to include proposal questions or information you are requesting from proposers in this section! All requested information should instead be clearly outlined in “3.1 Proposal Content” and/or in the response workbook that proposers fill out.

See [Module 4 of the GPL’s RFP Guidebook](#) for guidance on writing your Scope of Work.

2.1: Services to be Provided

Explain the **services, primary tasks,** and **major components** to be performed in clear language. Include the estimated number and type of services required per unit of time (month, year, etc.) to give proposers sufficient information to estimate the cost and duration of a service.

This section may have multiple subsections, including the optional subsections below, or could be structured by describing the various categories/types of work the proposer will perform.

Service Requirements: Describe the core components of the service or program and critical requirements for service delivery, including major deliverables. Consider including a high-level work plan or performance schedule for the contract with deliverable due dates, other important dates, and key milestones. Include any additional key service aspects that will help the proposer understand how to implement the service or program.

General Requirements: Provide information about special requirements the proposer should be made aware of. Requirements can include:

- *Legal Requirements*, such as specific requirements around compliance with local ordinances or state/federal regulations.
- *Staffing and Organizational Requirements*, such as staffing model, location of staff, supervision/management, pre-employment screening, training, and credentials/ licensure.
- *Data and Technology Requirements*, such as computer hardware/software, e-mail/ internet capability, assessment of client satisfaction, program evaluation, and records/ data collection/ reporting.
- *Financial and Compliance Requirements*, such as insurance requirements, financial control procedures, financial status reports, and audited financial statements.
- *Budget Requirements*, such as cost standards, program funding sources, proration, third party reimbursement, flat fees, fee-for-service revenues, and sub-consultant cost schedules.

Role of [government]: Outline the role of your government, department, or agency in providing this service or program and supporting the vendor, including administrative and technical support, information access, or other responsibilities your government plans to retain for which the vendor will not be responsible.

2.2: Performance Metrics and Contract Management

Performance Metrics

Suggested language: “[The government/department/agency] is interested in identifying metrics to work collaboratively with the awarded vendor(s) to monitor and improve performance during the life of the contract. [The government/department/agency] has identified initial metrics of interest and looks forward to working with the awarded vendor(s) to add to or refine this list during contract negotiations. The final set of performance metrics and frequency of collection will be negotiated by the successful proposer and the [government/department/agency] prior to the finalization of an agreement between parties and may be adjusted over time as needed.”

Specify 3–5 performance metrics to assess whether the vendor is making timely progress toward the contract goals. Include a mix of both output and outcome performance metrics:

- *Output measures* track the activities themselves, like clients served, miles paved, or software subscriptions.
- *Outcome measures* track the intended results or effects of the activities, such as reductions in unemployment, reductions in the number of car crashes, or increased resident satisfaction.

If known and appropriate, include **targets for metrics** (overall and at important intervals during the contract). Designate any additional data collection, reporting requirements, and monitoring responsibilities between the government and the vendor. List data to be provided by the selected vendor to help monitor performance, including any relevant demographic, performance, and service data. You may find it useful to organize your metrics similarly to the chart below.

| Performance Metric | Data Source | Data Collection Frequency | Data Collection Responsibility | Data Review Cadence | Past Performance Benchmark (if known) |
|--------------------|-------------|---------------------------|--------------------------------|---------------------|---------------------------------------|
| [Metric # 1] | | | | | |
| [Metric # 2] | | | | | |
| [Metric # 3] | | | | | |
| [Metric # 4] | | | | | |
| [Metric # 5] | | | | | |

If appropriate, highlight any anticipated performance incentives such as outcome-based payments or performance/bonus payments for achieving certain goals or service levels.

Contract Performance Monitoring

Suggested language: “As part of [government/department/agency]’s commitment to improved outcomes, [government/department/agency] seeks to actively and regularly collaborate with awarded vendors to enhance contract management, improve results, and adjust service delivery based on learning what works. Reliable and relevant data is necessary to drive service improvements, facilitate compliance, inform trends to be monitored, and evaluate results and performance. As such, [government/department/agency] reserves the right to request/collect other key data and metrics from vendors.”

Describe how your government will actively and consistently work with the vendor to track progress, flag challenges, and design course corrections to achieve the contract’s goals. Specify communication required with the government, including when data and information should be delivered, how frequently, and in what format (e.g., performance reports).

See [Module 5 of the GPL’s RFP Guidebook](#) for more information and guidance on developing performance metrics and managing performance during the contract term.

Section 3: Submission Instructions

3.1: Proposal Content

We recommend that you use a response [workbook](#), which is a template attachment that proposers fill out as their full proposal. Using a response workbook can help to standardize proposals for review by the evaluation team. It can also be especially helpful for RFPs where many proposers are new to government contracting or when you require specific information from proposers.

| PROPOSAL CHECKLIST | |
|--|-------------------|
| PROPOSAL SUBMISSION REQUIREMENTS | |
| [Insert requirement that you’d like proposer to double check – for example, “The proposal prices offered have been reviewed.”] | [insert checkbox] |
| [Insert requirement] | [insert checkbox] |
| [Insert requirement] | [insert checkbox] |
| [Insert requirement] | [insert checkbox] |
| PROPOSAL DOCUMENTS | |
| One-page Cover Letter (if required) | Response workbook |
| Table of Contents/Proposal Checklist | |
| Proposal Narrative – [Evaluation Criteria #1] | Response workbook |
| Proposal Narrative – [Evaluation Criteria #2] | Response workbook |
| Proposal Narrative – [Evaluation Criteria #3] | Response workbook |
| Proposal Narrative – [Evaluation Criteria #4] | Response workbook |
| Cost Proposal | Response workbook |
| Contract Exceptions | Response workbook |
| Additional Information (Optional) | |
| REQUIRED RFP COMPLIANCE DOCUMENTS | |
| Required Form – [Form Name] | Response workbook |
| Required Form – [Form Name] | Response workbook |
| Required Form – [Form Name] | Response workbook |

If your government does not wish to use a response workbook, list all the information that proposers need to submit in their response in place of or in addition to the checklist at left.

Make sure to align the proposal narrative with the evaluation criteria. For example, if you have a “Qualifications, Experience, and Capacity” evaluation criterion, that should match with a list of submission requirements under a Submission Requirements section called “Qualifications, Experience, and Capacity.”

Customize the following checklist based on documents the proposer must submit and the submission requirements of your government. A checklist will help your proposer check whether they have put together a complete proposal and followed all requirements.

3.2: Submission Instructions

Specify instructions for how proposals shall be submitted. These instructions could include:

- **Where** and **how** to submit the proposal (note: we recommend electronic submission over hard copy delivery whenever possible).
- **Helpful tips** for developing a successful proposal.
- Maximum **page counts** for the entire proposal or page/word/character counts for specific sections within the proposal.
- Rules regarding **modifications** of submissions.
- Procedures for proposers to submit **questions** (and view answers) while the RFP is open.

Section 4: How We Choose

4.1: Minimum Qualifications

List any **minimum requirements** firms must meet to bid on the opportunity. Minimum qualifications may include:

- Qualification to conduct business in the jurisdiction
- Not having been debarred by federal, state, or local government
- Mandatory experience (necessary minimum experience or references)
- Mandatory license types

Only include minimum qualifications that are absolutely mandatory, as these factors will be used to disqualify proposers. Avoid including requirements that might unnecessarily narrow the pool of eligible proposers, thereby limiting competition for the procurement. Keep in mind that many RFPs do not have minimum requirements.

4.2: Evaluation Criteria

Create a set of custom evaluation criteria tailored to this specific RFP that will allow your evaluators to assess proposals received. Assign a percentage (or points) to weight each criterion based on the relative importance of each factor. For more straightforward scoring, these criteria should map to the categories of information that the proposer will submit in their proposal. Common categories you might select from or customize include the following:

- Qualifications, Experience, and Capacity
- Service Delivery or Project Approach
- Project Management, Performance Improvement, and Communications
- Diversity, Equity, and Inclusion (DEI) Considerations
- Cost Proposal and Narrative

See [Module 6 of the GPL's RFP Guidebook](#) for more information and guidance on developing your evaluation criteria.

| EVALUATION CRITERIA | % ALLOCATION |
|--|--------------|
| <p>[Title of evaluation criterion 1]</p> <p>In a few bullet points, describe what this criterion refers to and what you will be evaluating for under this criterion. Be transparent with the proposer about what you are looking for!</p> | [% weight] |
| <p>[Title of evaluation criterion 2]</p> <p>In a few bullet points, describe what this criterion refers to and what you will be evaluating for under this criterion. Be transparent with the proposer about what you are looking for!</p> | [% weight] |
| <p>[Title of evaluation criterion 3]</p> <p>In a few bullet points, describe what this criterion refers to and what you will be evaluating for under this criterion. Be transparent with the proposer about what you are looking for!</p> | [% weight] |
| <p>[Title of evaluation criterion 4]</p> <p>In a few bullet points, describe what this criterion refers to and what you will be evaluating for under this criterion. Be transparent with the proposer about what you are looking for!</p> | [% weight] |
| <p>[Title of evaluation criterion 5]</p> <p>In a few bullet points, describe what this criterion refers to and what you will be evaluating for under this criterion. Be transparent with the proposer about what you are looking for!</p> | [% weight] |

4.3: Selection Process, Award, and Protest Procedures

Selection Schedule

Tailor the table below to reflect **important upcoming dates**, including the period for questions and answers, and estimated timing of contract negotiations. We recommend 4-6 weeks as the minimum time the RFP is open and checking that the due date for questions and the pre-proposal conference date are not too soon after the RFP issue date.

See [Module 1 of the GPL’s RFP Guidebook](#) for more information and guidance on developing key dates for your RFP and contracting process.

| Schedule | |
|---------------------------------------|---------|
| Event | Date(s) |
| RFP issue date | [Date] |
| Pre-proposal conference | [Date] |
| Deadline for questions | [Date] |
| Proposals due | [Date] |
| Interviews with shortlisted proposers | [Date] |
| Anticipated contract award date | [Date] |
| Anticipated contract execution date | [Date] |

Selection and Award Process

Explain the evaluation process and how the RFP will be scored. Use your government’s standard language and/or work with your purchasing office. This section can specify:

- The different **rounds of review** (e.g., in round one, a responsiveness review will determine the completeness of required documents and may disqualify incomplete proposals, and in round two, the evaluation committee will assess written proposals and invite top proposers to a round three interview or demonstration).
- Any unique **components of the selection process**, such as interviews, presentations, demos, or site visits.

Protest and Appeals Process

Explain the **protest and appeals process** or link to relevant website or code. Use your government’s standard language and/or work with your purchasing office to identify proper language for this section.

Section 5: Terms and Conditions

With guidance from your purchasing office, this section should include your government’s standard terms and conditions. Consider organizing your terms and conditions by those that are specific to the solicitation period and receipt of proposals versus those that will apply to the resulting contract term.

Section 6: Appendix

This appendix section should include:

1. All **required forms** that proposers must fill out that are not included in the response workbook (e.g., compliance forms or data security questionnaires), and
2. Any **additional documentation** that can help inform proposers' responses.

These attachments could include service or program specifics such as data tables, maps, diagrams detailing process flows or technical requirements, or additional background information.

The **Procurement Excellence Network** is an initiative of the Government Performance Lab designed to help public sector leaders use government procurement as a tool to improve resident outcomes and advance equity. The **Government Performance Lab**, housed at the Taubman Center for State and Local Government at the Harvard Kennedy School, conducts research on how governments can improve the results they achieve for their citizens. An important part of this research model involves providing hands-on technical assistance to state and local governments. Through this involvement, we gain insights into the barriers that governments face and the solutions that can overcome these barriers. By engaging current students and recent graduates in this effort, we are able to provide experiential learning as well.

What Works Cities Certification provides cities at all points in their data journey with a standard of excellence that shows how investing in data and evidence practices can lead to better and more equitable results for residents. This guide includes strategies in alignment with the following What Works Cities Certification criteria:

- Results-Driven Contracting (RDC) 1: Defining Goals for Key Procurements
- Results-Driven Contracting (RDC) 2: Measuring Outcomes for Key Procurements
- Results-Driven Contracting (RDC) 4: Structuring Procurements to Support Strategic Goals

Learn more about how to get your city Certified.

The Government Performance Lab is grateful for support from Bloomberg Philanthropies.

© Copyright 2022 Harvard Kennedy School Government Performance Lab