

Before You Write an RFP

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Writing an RFP can be a daunting experience. In fact, the process can initially seem so formidable that many schools sadly resort to cut-and-paste jobs from the Internet or lifting language from other school or district RFPs, despite the lack of relevance to their specific needs or the differing scope of the proposed solution.

While this may make the process seem easier, not thoroughly defining your school's or district's unique needs, situation, and context can make for complications and squandered opportunities further down the line. The key to developing an effective RFP is the time you invest before writing: time spent evaluating, planning, and defining. In fact, an RFP is an opportunity to interview key stakeholders and formulate the measurable requirements needed to build successful programs.

It's a good idea to include a representative from every department affected by the project. When decisions are made in silos, you are just asking for trouble. You may also want to ask a school administrator to be involved in the RFP process. When an administrator is part of the process, the buy-in for implementation and training is usually better received.

First, by establishing an evaluation team comprised of key stakeholders and individuals representing a wide range of relevant knowledge, you will be able to convey to potential vendors a more comprehensive picture of your school's or district's needs. For a small program, a small team will be adequate. A more ambitious program or initiative will require a larger, more diverse team of voices. Be wary, however, of forming unwieldy teams with "too many cooks in the kitchen."

Next, define the product, service, or solution you need as clearly and comprehensively as possible. This doesn't mean writing a multi-page tome. A paragraph or page (at most) should suffice. Conducting a needs analysis will help feed this definition, one that will clarify for all involved what your team is attempting to achieve. It allows your team to add requirements, tweak specifications, or fold in additional features. This definition can also serve as a Pole Star guiding the process to avoid it straying too far from its original objectives.

You will also want to clarify the specific criteria required of vendors for them to be considered. This goes beyond the products or services offered, and requires other criteria that make a vendor a good fit, such as location, client relationships, size, mission, etc.

Lastly, you will want to collect all of these elements into a document—a pre-RFP, if you will—and share with your team and stakeholders for more feedback. After this feedback is incorporated, you will want to share the document with any other decision makers that haven't been involved in the process up to this point but whom should give their approval. Have the team analyze the comments and create the final document that will become your RFP.

Either before you begin writing your RFP or concurrently, you will want to begin compiling a list of possible vendors that meet your defined requirements. Capture these vendors and their contact information in a spreadsheet or database program. Send all eligible vendors a Request for Information (RFI).

An RFI serves as an initial introduction of your school or district, whom to contact regarding this project, a brief description of the solution you are looking for, any information the company may have regarding relevant solutions or services, examples of relevant work, any urgent criteria that the project would require (face-to-face meetings, experience in the education sector, 24/7 support, professional development services, etc.), related assumptions, constraints, terms, conditions, and deadlines for response.

When the vendors respond, follow up with any questions or clarifications. Review the RFIs and follow-up responses with your core team and eliminate any vendors that do not immediately appear to meet your needs. Your deciding criteria may include such factors as capabilities, experience, reputation, quality, location, or size, for example.

The larger the project, the larger your remaining pool of applicants should be. RFIs are also a great way to enrich your RFP, in that they provide a level of specific information and viewpoints that you and your team may not have considered or had access to.

If budget is your primary concern (more than usual, that is!), you may wish to—either, instead of, or in addition to your RFI—send a Request for Quotation (RFQ).

An RFQ invites vendors to bid on specific products or services, as well as provide payment terms. The more specific your definitions are going into this process, the more accurate your quote will be. RFQs make the most sense when schools are looking for a specific product or service versus a sweeping solution.

Armed with this information as well as a comprehensive, tested definition of the solution you seek, you are (finally) ready to begin writing your RFP.