



Reading the RFP:

What You Don't Know Can Hurt You

The Magi Group, LLC
OPGS Grantwriting Class, Session 4

Objectives



- To be able to identify the pertinent information of an RFP
- To be able to identify the most important evaluation factors of an RFP
- To learn how to write an effective Letter of Intent
- To learn how to write an effective Executive Summary

What's an RFP?

- Request for Proposal is an invitation for suppliers, often through a bidding process, to submit a proposal on a specific commodity or service.
- Different sections of the RFP are often written by different authors, and sometimes boilerplate is inserted without adequate review. Do not be surprised to find contradictions and ambiguities. Ask questions.
- Sometimes the interplay between the various sections can provide valuable insight into what they have in mind.
- Make sure you comply to the RFP and give the potential customer what they want instead of what you want for them.
- If they offer a Bidder's Meeting , make it a priority to attend. Pay attention to Question and Answer amendments.

Federal RFP Format

- Overview
- Executive Summary
- Section I: Funding Opportunity Description
- Section II: Award Information
- Section III: Eligibility Information
- Section IV: Application and Submission Information
- Section V: Application Review Information
- Section VI: Award Administration Information
- Section VII: Agency Contact(s)
- Section VIII: Other Information



Overview and Executive Summary



- Provides an executive summary of the project and background explanation of the need for the request.
- The background section begins to help you determine if you are a good fit or what specific skills, experience, or technology you bring to bear.

Section I: Funding Opportunity Description



- Statutory Authority that allows the funding to exist and shows where it comes from.
- Purpose and objectives of the funding. (Is it really you that they are looking for?)
- Allowable activities

Section II: Award Information



- Funding Instrument type
- Total Funding Available
- Expected Number of Awards
- Award Ceiling
- Award Floor
- Average Projected Award Amount
- Length of Project Period
- Additional info on Awards (Availability of Funding Clauses)

Section III: Eligibility Information



- 1. Eligible Applicants
- 2. Cost Sharing or Matching
- 3. Other - (if applicable)
 - Additional Client eligibility info
 - Disqualification Factors

Section IV: Application and Submission Information



- **1. Address to Request Application Package**
 - Where to find necessary forms for the response
 - Federal Relay Assistance
- **2. Content and Form of Application Submission** (Copies, Signatures, Format, Order of Documents, Submission Options,)
- **3. Submission Dates and Times** (Allowable methods of proposal delivery, late applications, extensions, and receipt of delivery,)
- **4. Intergovernmental Review** (If you need a Single Point of Contact)
- **5. Funding Restrictions** – what you can not spend on
- **6. Other Submission Requirements** – options if more than on delivery method

Section V: Application Review Information



- **Criteria** - (Points and weight of each section – use these as section headers)
- **Review and Selection Process** – (Initial screening methods, Objective Review and Results)
- **Anticipated Announcement and Award Dates** – when to expect a response . . . Often times they may not get specific

Section VI: Award Administration Information



- **Award Notices** (steps they will take if you are funded)
- **Administrative and National Policy Requirements** (Rules you are subject to)
- **Reporting** (Programmatic and Fiscal Report Expectations)

Section VII: Agency Contact(s)



- **Program Contact** – day to day programmatic contact for the project.
- **Contract Contact** – contract information for modifications and grant compliance.
- **Federal Relay Assistance Information**

Section VIII: Other Information



- Reference Sites
- Standard Forms, certifications, and assurances
- Application Checklists
- Appendices

District RFP/RFAs



- The format of District of Columbia RFAs varies, but generally include the following sections:
 - **General Information** – eligible organizations, source, funding amounts
 - **Submission of Applications** – due date and time, method, contact info
 - **Program and Administrative Requirements** – allowable direct & indirect costs
 - **General Provisions** – insurance, audits, nondiscrimination and service delivery
 - **Program Scope of Work** – project description
 - **Review and Scoring of Application** – scoring criteria and decision on awards
 - **Proposal/Application Format** – formatting requirements, descriptions of sections
 - **List of Attachments** - items that should be included with proposal submission

How to Read a Federal RFP (Recommended Order)



1. **Section IV** – It lists the due date, format, submission format, and restrictions (Can I draft a competitive proposal in the timeframe?)
2. **Section III** – Determines eligibility/if a match is needed. (Do I qualify?)
3. **Section I** – Purpose, objectives, and allowable activities of the funding (Is it a good fit for what my organization does today?)
4. **Section II** – # of Awards, award amounts, length of project. (Am I a competitive organization under these constraints?)
5. **Section V** – Shows how they will score and what they think is important. (How much attention can I give a section based on the amount of time I have available?)
6. **Section VIII** – Attachments (What documents do I need to immediately start collecting or assembling?)
7. Read the other sections in order as you see fit.

How to Read a District RFP (Recommended Order)



1. **Submission of Applications**– It lists the due date and time. ***(Can I draft a competitive proposal in the timeframe?)***
2. **General information**– Determines eligibility, # of Awards, award amounts, length of project. ***(Do I qualify?/Am I competitive)***
3. **Program Scope of Work**– Purpose, objectives, and allowable activities of the funding ***(Is it a good fit for what my organization does today?)***
4. **Review and Scoring of Application**– Shows how they will score and what they think is important. ***(How much attention can I give a section based on the amount of time I have available?)***
5. **List of Attachments** Attachments ***(What documents do I need to immediately start collecting or assembling?)***
6. **Proposal/Application Format** - format, submission format, and restrictions. ***(Do I understand how they want the proposal?)***



Finished files are the result
of years of scientific study
combined with the
experience of years

RFP/RFA Reminders



- Though it may seem cumbersome, review the entire RFP/RFA. The actual RFP/RFA content you have to read vs. how much it is boilerplate regulations makes it manageable.
- Put the RFP in a three-ringed binder for easy use during the response process. Use small post-it notes and a highlighter to mark important pages and paragraphs. Do the same with every document received in conjunction with the solicitation i.e. correspondence, amendments, etc
- If you do not understand information in the RFP contact the Contracting Officer. Put it into writing. Make sure there is a date by which questions are due and that you respond by that date.
- Make sure you word your questions carefully to ensure you do not giveaway your strategy or pricing to your competitors.

Letters of Intent/Inquiry (LOI)



- A good letter of inquiry can be more challenging to write than a full proposal. The key is to be clear, informative, and succinct.
- The letter of inquiry should be brief—no more than three pages—and must be a succinct but thorough presentation of the need or problem you have identified, the proposed solution, and your organization's qualifications for implementing that solution.
- The letter of inquiry should be addressed to the appropriate contact person at a foundation.
- Many foundations now prefer that funding requests be submitted first in letter format instead of a full proposal. Others use preliminary letters of inquiry to determine if they have an interest in a project before accepting a full proposal

LOI Format



- **The introduction** includes the name of your organization, the amount needed or requested, and a description of the project. The qualifications of project staff, a brief description of evaluative methodology, and a timetable are also included here.
- **The organization description** should be concise and focus on the ability of your organization to meet the stated need. Provide a very brief history and description of your current programs while demonstrating a direct connection between what is currently being done and what you wish to accomplish with the requested funding.
- **The statement of need** must convince the reader that there is an important need that can be met by your project. The statement of need includes: a description of the target population and geographical area, appropriate abbreviated statistical data, and concrete examples.

LOI Format (cont.)



- **The methodology** should be appropriate to your statement of need and present a clear, logical, and achievable solution to the stated need. Describe the project briefly, including major activities, names and titles of key project staff, and your desired objectives.
- **Other funding sources** being approached for support of this project should be listed in a brief sentence or paragraph.
- **The final summary** restates the intent of the project, affirms your readiness to answer further questions, and thanks the potential funder for its consideration.
- Attachments should be included only at the direction of the potential funder and should be specific to its application guidelines.

Executive Summary



- If you think a proposal's executive summary is really a summary, you're missing the point. What you're really trying to do is lay out the case for your proposal.
- While the executive summary is usually the shortest part of a proposal, it's also the portion that your potential customer reads first. Thus, this section requires the most skillful writing. It generally should be written last.
- The executive summary balances an efficient delivery of key information with a persuasive, well-substantiated pitch. Above all, it must demonstrate a clear understanding of the funders needs.
- Indeed, some evaluators can be so put off by a executive summary . . . one that is confusing or difficult to understand that they fail to evaluate the rest of the proposal with an open mind.

Executive Summary



- Be consistent. Don't introduce new information at this point. Only use information that has already appeared in some part of your proposal.
- Emphasize why should your organization do this program (as opposed to any other organization)
- Follow a similar format to the LOI, however it is generally not necessary to include a funding request amount.
- Be sure to pay attention to the page/section guidelines for the Executive Summary.



QUESTIONS?