

Template guide to Request for proposal (RFP)

Before you start!

Just like any template of a general nature, this RFP template cannot accommodate all purchasing circumstances or suit the specific needs of buying organisations.

Zerite Network does not warrant or represent that these documents will meet the exact needs of any one requirement.

The RFP template is intended to be a launch pad or thought-jogging device and Zerite Network expects that users will customise the template to suit their needs. Individuals should therefore not rely on the contained information and are encouraged to use their own judgement as to the applicability of any of the provided materials and when independent professional advice should be sought.

[INSERT COMPANY LOGO]

[INSERT COMPANY NAME AND ADDRESS]

REQUEST FOR PROPOSAL

[Name of Project or Requirement – eg “Supply of ...”]

[Reference Number (usually the number reserved for the Proposed Contract)]

Issue Date: [*insert date*]

Closing Date and Time: [*insert date and time*]

Contents [*Update as Required*]

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Instructions to proposers and proposal conditions

Part 1

Definitions

For the purposes of this Request for Proposal (RFP) and any subsequent contract the following definitions, unless otherwise noted, apply.

Company	means <i>(insert the name of your company)</i>
Contract	Means any contract that results from this Request for Proposal
Contractor	Means the entity that forms a Contract with the Company for provision of the requirement
Proposal	Means a written offer submitted in response to this Request for Proposal
Proposer	Means an entity that submits, or is invited to submit, a Proposal in response to this Request for Proposal
Requirement	Means the supply to be made by the Contractor to the Company in accordance with Part 2 of the RFP.

Summary of requirements

Company invites you to submit a Proposal for the *[summary of requirement]*.

Structure of this document

This RFP comprises of four parts as described below:

Part	Title	Description
1	Instructions to Proposers	Sets out rules and requirements for
2	The requirement	Sets out details of the requirement, including scope of works
3	Information to be provided by proposers	Sets out the minimum RFP response requirements to allow due consideration by the Company.
4	Proposed Contract	Sets out the applicable terms and conditions that will apply to any contract arising from this RFP

RFP key dates

The following key dates apply to this RFP:

RFP Issue Date	As stated on the cover
Date for the Proposal Acknowledgement	<i>insert</i>
Date of Proposer briefing/site visit if need be	<i>insert</i>
RFP Closing Date and Time	As stated on the cover
Estimated Contract Award Date	<i>insert</i>

*** feel free to add the dates that matter to you and get rid of those that don't

Company contact

The following individual is the nominated Company contact for this RFP.

Name	<i>Insert</i>
Title/Position	<i>Insert</i>
Telephone	<i>Insert</i>
Facsimile	<i>Insert</i>
Email address	<i>Insert</i>
Postal address	<i>Insert</i>

Queries and questions during the RFP period

Proposers are to direct any queries and questions regarding the RFP content or process to the Company contact. No other Company personnel are to be contacted in relation to this RFP unless directed to do so by the Company contact. Company reserves the right to disqualify and reject Proposals that do not comply with this requirement. All questions should be submitted in writing either by post, facsimile or to the nominated email address.

Company may choose to convey responses to submitted questions and queries to all Proposers so that each is equally informed.

Proposal briefing and site visit (if the tender will call for such)

Company will hold an RFP briefing session to further familiarise Proposers with the Requirement. This briefing will also include a visit to the Company site. A maximum of two representatives from each Proposer is permitted to attend the RFP briefing session and site visit. Further details regarding the RFP briefing session and site visit will be provided to Proposers.

Amendments to RFP documents

Company may amend the RFP documents by issuing notices, by way of formal [variation/addenda], to that effect to all Proposers and may extend the RFP closing date and time if deemed appropriate.

Proposal lodgement methods and requirements

Proposers must submit [number] copies of their Proposal to the Company in any of the following methods:

- By post to: [insert postal address].
- By email to: [insert email address]. The subject heading of the email shall be [RFP [insert reference number] – Proposal - [Proposer Name]]. Electronic copies are to be submitted in PDF and native (eg MS Word) format and proposers may submit multiple emails (suitably annotated – eg Email 1 of 3) if attached files are deemed too large to suit a single email transmission.
- By hand to: [insert details of drop off location – eg tender box]

Proposals must be prepared in English and in the format requested in Part 3 of this RFP. As a minimum, a Proposal is to also contain a cover letter [and executive summary].

Hard copy Proposals must be:

- ⇒ contained in a sealed envelope or package, clearly labelled with the RFP reference number; and
- ⇒ loose bound so that pages can be readily separated by the Company.

Late Proposals

Proposers are responsible for submitting their Proposals prior to the RFP closing date and time in accordance with the acceptable lodgement requirements described in Clause (*insert the clause number*)

There will be no allowance made by the Company for any delays in transmission of the Proposal from Proposer to Company. Any Proposal received by the Company later than the stipulated RFP closing date and time may be removed from further consideration by the Company.

Acceptance of proposals

Proposal may be for all or part of the Requirement and may be accepted by Company either wholly or in part. A Proposal will not be accepted by Company unless and until Company has signed a Contract or sent a 'Notice of Award' in writing to the successful Proposer.

Company is under no obligation to accept the lowest priced Proposal or any Proposal and reserves the right to reject any Proposal which is incomplete, conditional or not complying with the RFP documents.

Validity of Proposals

Proposals submitted in response to this RFP are to remain valid for a period of [insert number of days] from the RFP closing date.

Evaluation of Proposals

The minimum selection criteria to be used in the evaluation of Proposals include, but are not limited to, the following:

[insert evaluation criteria]

These criteria are not in any particular order nor do they necessarily carry equal weight. Company may request additional information from Proposers to assist further evaluation of Proposals.

Withdrawals

Proposals may be withdrawn at any time prior to the RFP closing date and time by written notice to the Company.

Proposers to inform themselves

Company has taken all reasonable care to ensure that the RFP is accurate, however the Company gives no representation or warranty as to the accuracy or sufficiency of the contained information and that all Proposers will receive the same information.

Proposers are required to inform themselves fully of all conditions, risks and other circumstances relating to the proposed contract prior to submitting a Proposal.

Proposed prices shall be deemed to cover the cost of complying with all the conditions of the RFP and of all things necessary for the due and proper performance and completion of the Requirement.

Costs of preparing Proposals

All costs relating to the preparation and submission of a Proposal are the sole responsibility of the Proposer. Company shall not pay any Proposer, wholly or in part, for its Proposal.

Confidentiality

Except as required for the preparation of a Proposal, Proposers must not, without Company's prior written consent, disclose to any third party any of the contents of the RFP documents. Proposers must ensure that their employees, consultants and agents also are bound and comply with this condition of confidentiality.

Inconsistencies and omissions

Proposers must promptly advise Company in writing of any inconsistencies and omissions they discover in the RFP.

The REQUIREMENT

Part 2

A) Background and context for the requirement.

Its important for the potential supplier to understand the need or reason for the requirement.

Any issues, unique attributes and other matters you think a potential supplier would need to know about the organisational climate, culture etc to perform the requirement should be included.

B) Organisation overview, including contact details

- Who is involved in the requirement?
- Who specifically are the customers of the requirement?
- Who will be the principle point of contact in the buying organisation?

C) Detailed description of the requirement

There are a number of recognised ways of describing what is required.

Sometimes the requirement needs to be very technical and prescriptive –setting out exact obligations like weights, sizes, colours and distances.

In other situations usually the case for an RFP rather than RFT the requirement can be more functional or performance-based and describe the expected outcomes or the problem that needs to be solved.

Another way of thinking about a functional or performance requirement is that

It describes outputs and expectations (eg flow rates, durability, reliability, target speeds, permitted variability) rather than inputs.

Another type of requirement is to reference a known acceptable example - perhaps an existing product or service.

D) You may use drawing and diagrams to give more details

E) Mention Quality Requirements/Performance Standards. This section is included to demonstrate the minimum acceptable standard and basic acceptance criteria for supplying the required goods/services.

F) Approvals. Are there any internal or external approvals or permits required before the requirement can be undertaken?

G) Buying Organisation inputs.

Will the buying organisation be providing any services or materials in support of the requirement (eg office space, materials, computers, etc)?

*****This Part of the Proposal document is intended to form part of the final Contract.**

Information to be provided by proposers

Part 2

Information to be provided by potential suppliers tends to fall into three basic groups:

- 1. Pricing information.**
- 2. Other non-price commercial information.**
- 3. Technical information.**

PROPOSED CONTRACT

Part 4

You can attach the blank contract so the proposer can know what it will look like