

Building an Effective Request for Proposal (RFP) Response



Presented by Briljent, LLC

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Building an Effective RFP Response

Agenda

- ▶ Welcome and Introduction
- ▶ Preparing Your Response
- ▶ Things That Can Go Wrong
- ▶ Transmittal Letter
- ▶ Business Proposal
- ▶ Technical Proposal
- ▶ Cost Proposal

Building an Effective RFP Response

Agenda

- ▶ Indiana Economic Impact
- ▶ Buy Indiana Initiative/Indiana Company
- ▶ Proposal Production/Delivery
- ▶ Additional Tips
- ▶ Contacts
- ▶ Thank You

Building an Effective RFP Response

About Brilljent

- ▶ Formed in 1998
- ▶ Offers professional services including technical writing, documentation, training, staff augmentation, and contact center optimization
- ▶ Women's Business Enterprise (WBE) certified in 2001 – State of Indiana is our second largest client
- ▶ WBE certified in Indiana, Illinois, Missouri, Wisconsin, Tennessee, and New York

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Preparing Your Response

- ▶ Attend pre-proposal session
- ▶ Submit questions
- ▶ Determine your Minority Business Enterprise (MBE) and WBE partners
- ▶ Secure your non-disclosure agreement (NDA) and Teaming Agreement with partners

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Preparing Your Response

- ▶ Review the entire RFP and create a proposal checklist
- ▶ Note any required supporting documentation such as an Operating Agreement, Certificate of Authority, Organization Chart, etc.
- ▶ Review sample contract
- ▶ Note any insurance requirements
- ▶ Note the maximum number of response pages

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Preparing Your Response

- ▶ Assign tasks to include writing assignments, gathering supporting documentation, references, subcontractor information, and letters of commitment
- ▶ Design a proposal template that includes the following:
 - ◆ Company name and logo
 - ◆ RFP number, name, and due date
 - ◆ Page numbers

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Preparing Your Response

- ▶ Cover page should include the following:
 - ◆ RFP number
 - ◆ Title
 - ◆ Submitted to and from
 - ◆ Proposal due date
- ▶ Table of Contents
- ▶ List of proposal attachments (see the next slide)

Proposal Attachments

Attachment, Section, Question Number	Description	Attachment Included (Y/N)
Attachment A, Business Proposal, 2.3.9	Minority and Women Business Form	Y
Attachment B, Transmittal Letter, 2.2.5 Business Proposal, 2.3.2 Business Proposal, 2.3.7 Buy Indiana, 2.7	Certificate of Authority	Y
Attachment C, Business Proposal, 2.3.2	Organization Chart	Y
Attachment D, Transmittal Letter, 2.2.5 Business Proposal, 2.3.3	Company Financial Information	Y
Attachment E, Business Proposal, 2.3.8	Operating Agreement	Y
Attachment F, Transmittal Letter, 2.2.2 Business Proposal, 2.3.9	Letters of Commitment	Y
Attachment G, Business Proposal, 2.3.10.1 Business Proposal, 2.3.10.2 Business Proposal, 2.4.4	Disaster Recovery Plan and Data Security	Y
Attachment H, Indiana Economic Impact, 2.6	Indiana Economic Impact Form	Y
Attachment I, Technical Proposal, 2.4.2 Cost Proposal, 2.5	Project Timeline	Y
Attachment J, Business Proposal, 2.3.13	Bidder Registration Screenshot	Y
Attachment K, Technical Proposal, 2.4.1	Resumes of Key Personnel	Y

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Preparing Your Response

- ▶ Include section numbering and follow exactly as provided in the RFP
- ▶ If possible, include a couple of “cushion” days to your time line

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Things That Can Go Wrong

- ▶ Put together your solution: have a team in place that will help pull together your solution and ensure these discussions take place early
- ▶ Cost estimating: do this as early as possible to ensure your solution will fall within the State's budget request (e.g., adding in costs of subcontractors, last-minute changes, financial leadership review)
- ▶ Editing: allow ample time
- ▶ Allow sufficient time for printing and delivery

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Transmittal Letter

- ▶ Must be in letter form
- ▶ Include section numbers and titles:
 - ◆ 2.2.2 – Ability and Desire to Supply Required Products or Services
 - Be brief and concise and include prior experience that relates to the requested services and/or your unique capabilities

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Business Proposal

▶ 2.3.1 General

- ◆ Provide a brief company overview, including any current project work that aligns with requested services
- ◆ Include the above information for your subcontractors

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Business Proposal

- ▶ 2.3.2 Respondent's Company Structure
 - ◆ List all locations
 - ◆ Indicate your State of Incorporation (Indicate Attachment for Certificate of Authority)
 - ◆ Date of Existence
 - ◆ Certifications
 - ◆ Chart of Organization (Indicate Attachment for company organization chart)

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Business Proposal

▶ 2.3.3 Company Financial Information

- ◆ Briljent submits all financials as “CONFIDENTIAL” per the Access Public Records Act (APRA)
- ◆ Contact the Indiana Department of Administration (IDOA) for help regarding your financial reporting.

▶ 2.3.4 Integrity of Company Structure and Financial Reporting

- ◆ In addition to Chief Executive Officer (CEO) and Chief Financial Officer (CFO) responsibilities, include any other relevant information such as your accounting/ time-keeping system and if you conduct annual audits

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Business Proposal

▶ 2.3.6 References

- ◆ Acquire approval from your contacts prior to using them as references and ensure contact information is correct/current
- ◆ We recommend including references for subcontractors

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Business Proposal

▶ 2.3.9 Subcontractors

- ◆ Indicate Attachment for Letters of Commitment

Subcontractor	Form of Organization	State Formed	Responsibilities	Value	MBE	WBE
Briljent	Limited Liability Company (LLC)	Indiana	<ul style="list-style-type: none">• Training• Web design	\$		Yes

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Business Proposal

- ▶ 2.3.11 Experience Serving State Governments
 - ◆ List specific departments/agencies to which you have provided service (e.g., Department of Education, Department of Health, Department of Child Services, etc.)
 - ◆ Include specific services provided (e.g., research, training, staffing, outreach, etc.)
 - ◆ Include the above information for your subcontractors

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Business Proposal

- ▶ 2.3.12 Experience Serving Similar Clients (see next slide)
 - ◆ Provide this information for your subcontractors

Project 1: (Name of Project)	
Customer	
Period of Performance	
Value of Contract	
Project Description	

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Business Proposal

▶ 2.3.13 Indiana Preferences

- ◆ Claim one: recycled content preference, Indiana Small Business preference, or eligibility for Buy Indiana points
(http://www.in.gov/idoa/files/vendor_handbook.pdf)
- ◆ Bidder Registration Profile (see next slide)
 - Indicates our principle place of business is located in Indiana (also refer to Section 2.7 – Buy IN Initiative/ IN Company)

Bidder Registration Profile

Welcome Header **Buy Indiana** Public Listing MBEM/WBE Address Select UNSPSC

SetID: STIND **Bidder ID:** 0000000000

Please select the category that most closely represents the status of your business with the State of Indiana.

Buy Indiana Certification

- A business whose principal place of business is located in Indiana.
- A business that pays a majority of its payroll (in dollar volume) to residents of Indiana.
- A business that employs Indiana residents as a majority of its employees.
- A business that makes significant capital investments in Indiana (1).
- A business that has a substantial positive economic impact on Indiana (1), (2).
- Business does not qualify as an Indiana Business

Please check the box acknowledging acceptance of your certification. Failure to check the certification box will cause your business to be classified as an Out of State business.

I certify that the information provided above is true and accurate as of the time of this registration. I further understand that using any false or misleading information may result in prosecution for fraud, revocation of certification, and having this business placed on a suspension list barring it from contracting or doing business with the State of Indiana or any of its agencies.

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Technical Proposal

▶ 2.4 Technical Proposal

- ◆ Do not simply repeat back RFP requirements; rephrase the requirements and demonstrate an understanding of what you are proposing to do:
 - Why are you doing it this way?
 - What are the benefits to your approach?
 - Why/how does it reduce costs and minimize the risk of failure?

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Technical Proposal

- ▶ Keep your responses easy to read and understand
- ▶ Utilize “callouts” and other graphics that will help tell your story and explain your solution in a visual way
- ▶ Only provide what the RFP asks for – no frills, extras, or long exaggerated summaries that do not explain the benefits of working with your firm

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Cost Proposal

▶ 2.5 Cost Proposal

- ◆ Use the template provided by the State
- ◆ Keep in mind that respondents who propose a 10% decrease to the State's current baseline cost will receive all of the available cost points
- ◆ In some cases, bonus points are available if certain criteria are met
- ◆ Include assumptions associated with your cost proposal

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Indiana Economic Impact

▶ 2.6 Indiana Economic Impact

- ◆ Confirm that your company is an Indiana firm and list any of your subcontractors that recognize economic impact concerns in Indiana
- ◆ Note that the Indiana Economic Impact Form is provided as an attachment
- ◆ When completing the Indiana Economic Impact Form, be sure to complete the “FTE Details” tab – it is easily missed

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Buy Indiana Initiative/Indiana Company

- ▶ 2.7 Buy Indiana Initiative/Indiana Company
 - ◆ Confirm your Buy Indiana status
 - ◆ Include the date your firm obtained a Certificate of Authority and note it is provided as an attachment

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Proposal Production/Delivery

- ▶ Hard copy (binder) – include tabs for the main proposal sections and mark one copy as “Original”
- ▶ Include tabs for each attachment and insert behind the main proposal sections
- ▶ CD-ROM – clearly label each proposal section and attachment before copying to the CD and mark one copy as “Original”
- ▶ Use CD labels for a professional look

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Proposal Production/Delivery

- ▶ Insert your business card in a hard-copy binder
- ▶ If possible, hand-deliver your proposal
- ▶ Get an official time- /date-stamped receipt
- ▶ **Remember:** mailing your proposal the day before it is due does not mean it will arrive on time since the proposal will arrive to the State mail room prior to getting delivered to IDOA; allow at least two days

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Additional Tips

- ▶ Review RFP Questions and Answers
- ▶ Continue to watch for amendments to the RFP
- ▶ Include sufficient time for editing your proposal – a well-written, organized, clean, and concise response goes a long way

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Additional Tips

- ▶ Use the following Web sites to gather additional proposal response information:
 - ◆ Check the IDOA *Bid Recommendations* page:
<http://www.in.gov/idoa/2462.htm>
 - Review Letters of Recommendation and winning proposals (not always posted) to gain valuable insight from the evaluation team scoring and comments
 - ◆ The Indiana Vendor Handbook is also a great source of information:
http://www.in.gov/idoa/files/vendor_handbook.pdf

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Contacts

Indiana Department of Administration

Minority & Women's Business Enterprises Division

Indiana Government Center South

402 West Washington Street, Room W469

Indianapolis, Indiana 46204

Phone: 317-232-3061

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Contacts

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Thank You

Questions?

Remember:

Briljent can help with your proposal writing needs!

Thank you!