Request For Proposal (RFP) Checklist

- **BACKGROUND OF THE ORGANIZATION:** Give a brief history of the organization and explain why it is undertaking this work at this point in time.

- **PURPOSE:** Describe the purpose of hiring the consultant and the background of the project. Give a brief description of the work you're looking for a consult to do (i.e. conduct a feasibility study, facilitate a planning retreat, develop a fundraising plan). Describe any specific outcomes or activities you're looking for and mention how this work will be used, if pertinent.

- **DELIVERABLES:** Give a clear list of the tasks and work products you will expect from the consultant at the completion of the project (i.e. reports, surveys, plans, etc.). and describe the specifics of what you want included. Also include any interim progress reports or meetings you expect during the project.

- **QUALIFICATIONS:** Describe the qualifications needed to complete the work successfully (i.e., strong financial background, tech savvy, fluency in Spanish, etc.)

- **FORM OF PROPOSAL:** Describe the format of responses to the RFP. If you require certain documents (i.e., Organizational charts of applicants' organization, resumes, etc.) list that here.

- **INTERVIEW:** Clarify if you will require an interview and whether a phone interview will suffice.

- **TERM OF CONTRACT:** Discuss the length of time the contract will cover. If you have a final deadline by which work must be completed, list that here.

- **REFERENCES:** If you require references, specify the number you require and the format in which you would like to receive those references. Is there a standard form to be filled out? Will you be contacting these references by phone?

- **PRICING:** Specify how you would like cost information presented. Will you allow for project costs (travel, out of pocket expense) or do you expect an all-inclusive price? Are you looking for an hourly, daily or project rate?

- **QUESTIONS:** Give details on whom to contact if there are questions about the RFP – both phone and email.

- **HOW TO RESPOND:** List the mechanism for response. Do you want the proposal emailed? Sent through the US Mail? Is so, how may copies? Do you have prohibitions against stapling or sending with a cover?

- **IMPORTANT DATES:** List key dates for the project so they are clear to the responder.