What to Consider Before Writing an RFP
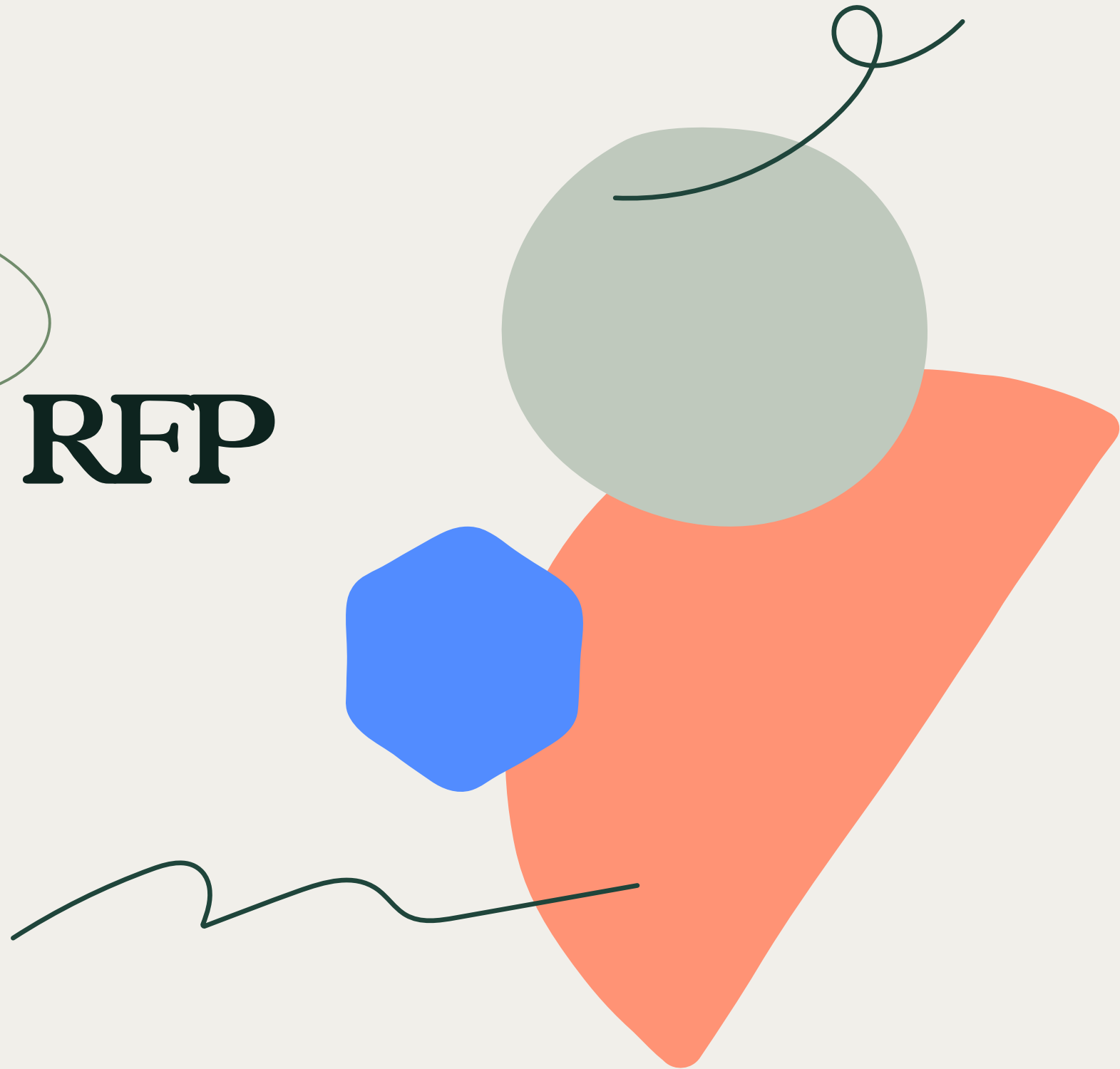
The prospect of creating a request for proposal (RFP) for your web design project can be pretty daunting. But it doesn't have to be! As a web design agency, we have been exposed to hundreds if not thousands of RFPs in our day. As a result, we have developed a good sense of what makes a strong RFP and what could use some improvement when it comes to effectively communicating your project and goals to a potential bidder.

How to Lay Out Your RFP

While this layout may not work for everyone, this is a common layout that we see from arts and culture organizations, and one that works really well for agencies like ours to prepare a proposal that is fully tailored to your project.

Introduction/Executive Summary

While not always necessary, this section is a great way to filter out agencies that aren't the right fit for your organization or project. By summarizing the information outlined throughout your RFP in up to two pages at the beginning, an agency can determine if they have the necessary expertise, resources, and capabilities to carry out your project. This section typically includes any or all of the following:

- Short description of your organization
- Purpose of the RFP and the project's strategic importance
- Short overview of what you're seeking in a web partner
- Short description of any research / internal work that will help guide the project
- High-level summary of project goals, broader strategy and goals of the organization, and how it aligns with your mission and dedicated to your existing and desired audience
- Overview of the project budget, timeline, and scope

Table of Contents

When preparing a proposal or determining if the team is a good fit for your project, there are a number of people from different disciplines looking at the information you've provided. For longer RFPs, a table of contents will allow these readers to easily navigate the information efficiently.

- Provide an accurate budget and timeline
- Define the scope of work
- Provide work examples and experience that are relevant to your project
- Provide a high-level project plan and approach
- Identify core team members with the expertise to carry out your project
- Provide preliminary solutions and ideas based on the needs and goals you've identified

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Organizational Overview

It is always recommended to provide an overview of your organization. Make sure to include its history, mission, vision, identity, programs & services, and position within the local and broader community. You want to find web partners who have experience within your industry. If you're not sure what to add, here are some ideas:

- A detailed explanation of your mission and vision
- A history of your organization, key achievements, and milestones
- An explanation of the programs, services, and work you do
- Current challenges to be addressed by the new website
- Any information about brand identity and/or guidelines
- Description of your target audience and served community
- User personas (if applicable)
- Introduction to internal stakeholders
- Any additional information that might help guide the project and proposal responses

Current Site Overview

This section is where you describe the current website's structure, its limitations, and the desired improvements. This insight helps project managers and developers reading through the RFP to understand your current technical setup and scope out the project more accurately.

- An assessment of the current website, including its strengths and weaknesses
- Technical specifications of the current site, such as the CMS, hosting details, and integrations with third-party services (Tessitura, Spektrix, Salesforce, etc.)
- Specific limitations that hinder the organization's digital objectives

Primary Objectives & KPIs

It is important to be upfront about the goals and objectives of your web design project in your RFP. This will lay the groundwork for more thorough proposal submissions and a smooth kickoff to the Project Discovery phase with your selected partner. This section might include:

- Clear objectives for the new website
- Specific key results or performance indicators
- Prioritized objectives to guide proposal responses
- Any secondary objectives or "nice-to-haves"

Features & Functional Requirements

Detailing the specific features and functionalities of your project is crucial to the RFP. While a lot of these elements will be discussed in Discovery to determine the best strategies and solution, it will help you feel more confident when selecting your web partner. This section should include:

- A comprehensive list of required features, organized by importance or phase
- Technical requirements, including preferred or required technologies and integrations
- Specific design and usability considerations to enhance user experience

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Website Examples & Inspiration

Although this section isn't always included in RFPs, it can provide a lot of valuable context to help guide the proposal and the project itself. This can be a great opportunity to share examples of websites that inspire you, as well as outline specific information about the examples, such as:

- Examples that embody the design and functionality desired for new website
- Key elements of inspiration from each example, such as layout, navigation, or features
- Any elements that aren't relevant to the goals and priorities of your new website
- Aspirational goals for the project inspired by these examples, such as innovative features

Scope of Work & Deliverables

This section is a critical part of an RFP, outlining the specific tasks, responsibilities, and expected outcomes for a project. This section provides potential vendors with a clear understanding of what is required, guiding them to create precise and relevant proposals. Here's what to include in this section:

- Scope of Work — the specific tasks, objectives, and outcomes expected from the project
- Budget & Timeline — detailed and clear information regarding the allocated budget and desired timeline

Proposal Submission

This section of the RFP helps guide bidding teams in preparing their proposals to ensure that you receive the information you need to evaluate and select the right partner. This is typically broken down into the following subsections:

- Submission Guidelines — what you expect to receive in the proposals, such as detailed cost breakdowns, team bios, previous project examples, and how the bidder plans to approach your project
- Selection Process & Criteria — the process and criteria for evaluating proposals
- Contact Information — an invitation for questions with clear contact information
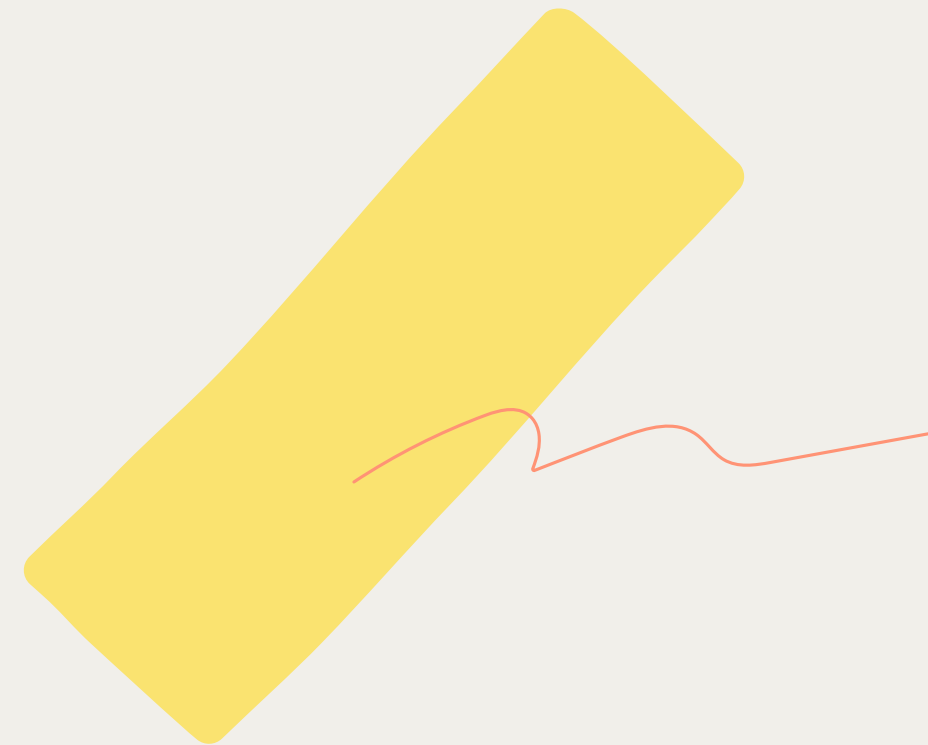
Incorporating these considerations into each section of the RFP will provide potential vendors with a clear understanding of the project, the organization's needs, and expectations. This approach will help attract proposals that are closely aligned with the organization's goals and facilitates a smoother selection process. Remember, no two RFPs are exactly the same! This is simply a starting point for those thinking about embarking on a website redesign project, who might not know where to start.

RFP Writing Guide — Template

Use this template to record notes that will help guide you in the creation of your Request for Proposal!
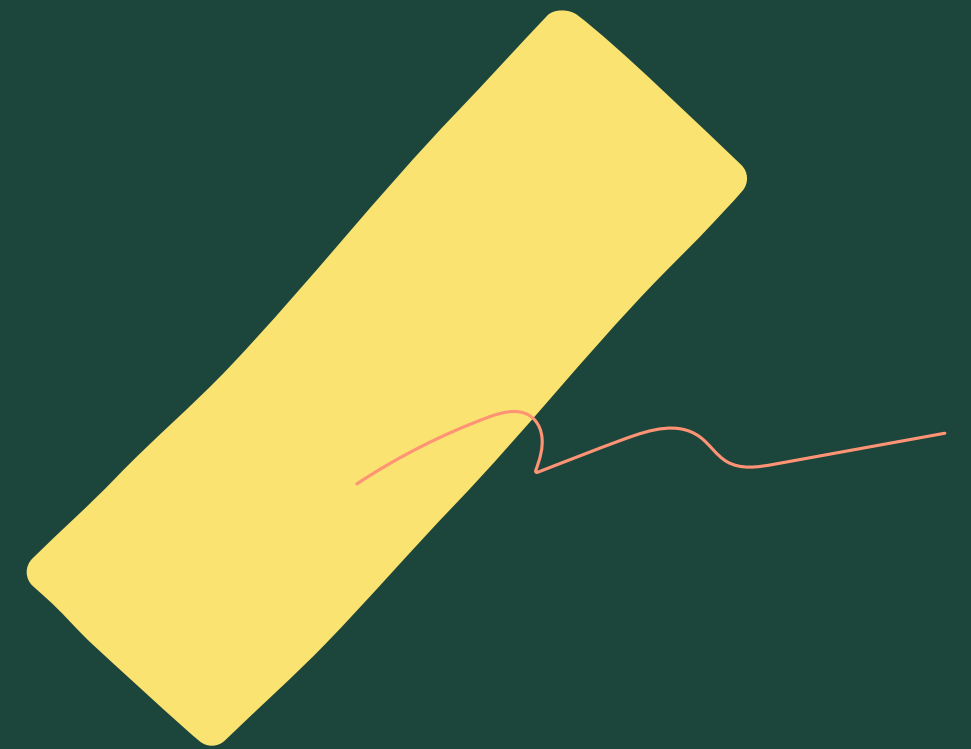
Cover Page

RFP Title

Organization

Budget

Project Due Date

Contact Person's Name

Contact Person's Email

Introduction

Organization Overview
Brief description of your organization.

Purpose of the RFP
Explanation of the need for the website redesign and its strategic importance.

Project Overview
High-level summary of the project goals and how it aligns with your organizational strategies.

01. Organizational Overview

Mission & Vision
Detailed description emphasizing the impact of your work.

Brand Identity
Any existing guidelines and visual style.

History & Achievements
Major milestones and achievements.

Audience & Community Impact
Description of the target audience and community involvement.

Services & Programs
Overview of services offered and target demographics.

Current Challenges & Opportunities
Challenges the new website should address and potential opportunities.

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02. Current Site Overview

Assessment of Current Site
Strengths and weaknesses of the current website.

Technical Specifications
Content Mangement System (CMS), hosting details, integrations.

Current Limitations
Specific limitations that are hindering the organization's objectives.

03. Primary Objectives & KPIs

Project Goals
Clear, measurable objectives for the new website.

KPIs
Specific key performance indicators to measure success.

Primary & Secondary Objectives
Main priorities and "nice-to-haves."

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04. Features & Functional Requirements

Required Features
Detailed list of features necessary for the new site.

Technical Requirements
CMS preferences, required integrations, etc.

Design & Usability
Guidelines on the user experience and accessibility standards.

05. Website Examples & Inspiration

Examples
Links to websites that inspire your vision with notes on what you like & don't like specifically.

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06. Scope of Work & Deliverables

Detailed Scope
Strengths and weaknesses of the current website.

Budget Overview
Total budget or budget range for the project.

Expected Deliverables
List of deliverables with expected quality and formats.

Timeline
Key milestones, deadlines, and important dates.

07. Proposal Submission

Submission Requirements
Format, content, and length of the proposal, how and where to submit the proposal. Details that vendors need to include about their team and experience.

RFP Timeline
Key dates for the selection process.

Evaluation Criteria
How proposals will be evaluated.

Contact Information
Name and contact details for inquiries.

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