



SESSION 3

Template for a Request for Proposal (RFP) to Obtain Outside Professional Assistance

I. Introduction

A succinct statement describing the purpose of the request for proposal. Example:

“The (name of institute) is seeking proposals from qualified consultants to assist in our strategic property planning process.”

II. Background Information

The religious institute should provide summary background information about itself, which at minimum includes:

- Relevant historical information on the institute’s founding, charism and organizational structure,
- Mission and ministries, and
- Number of members, median age and general geographic areas in which members are located.

III. Institute Goals for the Project

A succinct statement describing the religious institute’s goals for strategic property planning, such as:

“The (name of institute) intends to select a consultant to provide guidance and technical support to a strategic property planning committee that has been tasked with the responsibility to develop and present recommendations to our (date) Assembly.”

“The selected consultant will be expected to assist the strategic property planning committee in engaging institute membership throughout the planning process and in building a strong consensus for the recommendations presented to the Assembly.”

“The primary goal of this project is for the institute to identify the most critical challenges to continued future ownership of our properties and to develop a plan of action that successfully addresses these challenges.”





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Alternatively, an effective way institutes can communicate their goals is to articulate questions the institute desires the project to address. Examples:

What are the main challenges associated with management, operation and ownership of the properties we own and how do they affect our future viability?

What are the biggest barriers to aligning the real estate assets we now own with our current and future needs?

What realistic opportunities exist to exercise prudent stewardship of our real estate assets through reconfiguration of space use, repurposing or changes in ownership?"

IV. Scope of Work Statement

This section identifies and describes the main elements of the work the religious institute requires of the consultant. Example:

"The strategic property planning consultant selected by the institute will be required to:

- 1. Work collaboratively with the strategic property planning committee to achieve the institute's goals for the strategic property planning process.*
- 2. Propose a specific process and timetable for the strategic property planning process and adapt this process as necessary.*
- 3. Identify, compile, summarize and interpret data and information relevant to the strategic property planning process.*
- 4. Suggest and implement strategies to effectively engage members in the strategic property planning process.*
- 5. Plan and facilitate all meetings of the strategic property planning committee.*
- 6. Make presentations and interact with small and large groups of members in consultation with the strategic property planning committee.*
- 7. Prepare draft and final written materials required as part of the strategic property planning process, including draft and final versions of recommendations for the future.*





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V. Deliverables

This section identifies specific deliverables the institute requires the selected consultant to provide. Example:

“The consultant must provide draft and final versions of all major documents required to support the institute’s strategic property planning process, including documents which:

- a. Describe in detail the major components, roles and responsibilities and timeline for the institute’s strategic property planning process, including a plan for engagement of institute membership in the process,*
- b. Provide results of space utilization or other assessments required as part of the institute’s strategic property planning process,*
- c. Summarize relevant realities for the institute that stem from these assessments,*
- d. Define the most critical decisions and changes the institute needs to make in conjunction with its strategic property planning, and*
- e. Describe recommendations and a timetable for implementation of these recommendations if accepted.*

VI. Consultant Qualifications

This section identifies the institute’s minimum requirements for consultants it will consider. Examples:

“Consultants eligible to submit a proposal for consideration must meet the following minimum requirements:

- 1. The consultant must be an individual or entity with a proven track record and at least five years’ experience providing consulting services similar to those described in this request for proposal.*
- 2. The consultant must have extensive experience working with institutes of (men or women) religious in a consulting capacity.*
- 3. The consultant must have specific experience as a strategic property planning consultant for (men or women) religious.*





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4. *The consultant must have experience successfully engaging membership in planning processes.*
5. *The consultant must possess the organizational, communications, analytical and critical thinking skills required of successful strategic planning property consultants.”*

VII. Content and Organization of Proposals

This section defines the content the institute requires in the proposal and prescribes a standard format for organizing these contents similar to the following:

“Only proposals that provide the following information in the order prescribed below will be considered for selection:

1. **Background information** on consultant (individual or entity), including, as relevant, type of entity, years in business and ownership structure.
2. A description of the consultant’s **understanding of institute’s need** for consulting services and its main goals for these services.
3. A description of the consultant’s **approach and timetable** for providing the scope of services described in the request for proposal.
4. A description of the consultant’s **staffing plan and qualifications** for each person defined as a member of the proposed consulting team (resumes for each team member should be attached to the proposal). Identify any subcontractors if subcontractors are proposed, including the specific services to be provided by each subcontractor and each subcontractor’s qualifications to provide those services.
5. **References** from at least three religious institutes for whom the consultant has provided the same or similar services. Provide names and contact information for each reference.
6. **Price proposal**, including applicable billing rates, relevant billing policies, total fees for consulting services, estimated expenses and total costs to the institute.





VIII. Proposal Submission Requirements

This section specifies the manner in which proposals are to be submitted (i.e., paper copies, electronically or both), identifies any restrictions on length of response (many RFPs identify a maximum number of pages for a proposal), provides contact information for the individual to whom proposals are to be submitted and defines a firm, fixed date for submission of proposals.

It should also identify key dates from the institute's procurement timeline (e.g., dates for interviews and expected data of selection and notification of selected consultant, etc.)

IX. Proposal Evaluation Criteria

This section identifies criteria the institute will use to evaluate a proposal, including the relative weight that will be given to the quality of the narrative response and price. This can either be a generic reference (for example, quality of the narrative response will be worth x% and price will be worth y%) or a more elaborate scoring system that assigns a number of points to each major area (so many points for consultant qualifications, so many for the consultant's proposed approach and so many for price). Sometimes, evaluation and/or scoring of proposals is actually separated into two parts: quality and depth of the narrative response to the needs described in the request for proposal (usually termed a technical response) and pricing. More extreme versions of this separation have price submitted separately in a sealed envelope so proposal reviewers focus on the quality of the narrative response, uninfluenced by price.

X. Inquiries

This section identifies the institute's preference for handling inquiries related to the request for proposal (i.e., whether these can be made via phone or electronically) and provides relevant contact information.





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XI. Disclaimers

Any admonitions, disclaimers or rights the institute wishes to articulate should be identified in this section. Examples:

- 1. The institute is not obliged to make an award under this request for proposal and may reject any and all proposals.*
- 2. The institute reserves the right to negotiate the scope of services and price with any or all respondents to the request for proposal.*
- 3. The institute will attempt to honor the confidentiality of proprietary information provided any proprietary information is clearly labeled as such in the proposal.*

XII. Confidentiality

The institute's expectations regarding confidentiality of information included in the RFP will be identified in this section, including the future need for the selected consultant to sign a confidentiality agreement if the institute will require a signed confidentiality agreement.

