

RFP Getting Started Worksheet

A tool for managing results-driven procurements

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Government Performance Lab

Components of a Best-Practice RFP

Component	Key Questions
A clear problem statement with defined outcome goals	What are you trying to achieve? In what ways do you want to modify the status quo?
A defined target/user population	Who are the intended recipients or users of this program or service? What are their needs?
A scope of services description that invites innovation	How does the RFP create space for vendors/providers to propose solutions that will help achieve the outcome goals?
Performance metrics and a plan for managing performance during the contract term	How will you measure whether the procured program or service is making progress toward the goal?
A purposeful evaluation and selection process	How does the selection process elevate the proposals most likely to achieve the stated outcome goals?
Aligned incentives	Where appropriate, how does the contract payment structure encourage the vendor/provider to achieve the stated outcome goals?

RFP Getting Started Worksheet Overview

Solicitation Overview	Problem Statement	What problem is the procurement intended to address? What can we share about past or current efforts to solve it?	SOW	Incentive Structure	What contract and payment structure best aligns provider incentives with cost-effective performance? Are there opportunities to link payments to results?	
	Outcome Goals	What outcome goals is the department/agency trying to make progress on? What is the gap between where we are today and where we want to be?		Performance	Metrics	How will we measure progress towards our goals? What metrics can be used to orient vendors towards our vision of success?
	Target Population	Who is the target population, or intended users, for this product or service? Are there equity or access concerns?			Contract Management	What governance structure, including reporting, meeting cadence, and data collection requirements would be appropriate to ensure sufficient oversight?
Scope of Work	Scope of Work	What elements of the scope of work are required to realize our outcome goals, comply with the law, and align with agency priorities?	Evaluation	Scoring Criteria	Which priorities are most important to integrate into scoring criteria? What specific proposal questions best capture those priorities?	
	Innovation	Where could the scope allow greater flexibility and opportunities for innovation? Can we shift the focus to “what” rather than “how?”		Risks	What are the biggest risks to the success of the procurement? How can these risks be mitigated?	

How to use the Worksheet

Why use this tool?

- RFPs often require input, support, and approval from many teams and units: from procurement, to program, to legal.
- Normally, this can lead to extensive back-and-forth to answer key questions about content and planning.
- This worksheet helps teams collaboratively gather information and answer questions at the start of an RFP process.

When is it useful?

- The contract specialist or procurement team can answer the worksheet's questions with key stakeholders to begin drafting the RFP.
- Once the slides are filled with notes, they can be copied to an RFP template as a next step.
- Completing the worksheet may also reveal missing information, disagreements, or questions that require further research.

Who might use it?

- The contract specialist might use it alone, as a drafting and organization tool.
- The contract specialist might collaborate with a small group of program and procurement staff who have the requisite knowledge to answer worksheet questions.
- The contract specialist might convene the full evaluation team or a cross-agency group of stakeholders and use the tool to get buy-in.

Next Steps

Where can I find the worksheet?

- There are two versions of the Getting Started Worksheet available on [OPM's website](#).
- A PowerPoint worksheet is available, which is ideal for procurement staff to present to large or small groups of RFP stakeholders.
- A Word worksheet is also available, and is useful for procurement staff as an individual tool to organize information and begin outlining an RFP.

How do I get support?

- For support and guidance on how to use this worksheet, procurement staff can contact OPM Finance's Procurement Policy Development Coordinator, Julia Fusfeld: Julia.Fusfeld@ct.gov
- OPM Finance is always available as a resource to human service agencies navigating procurement and RFP processes.