Request for proposal (RFP)

[Project name] · issued by [your organisation] · [date]

How to use this template: replace everything in square brackets and delete the grey guidance. Fill in section 5 (evaluation) and the matching Setup tab of the scoring sheet before you send it: suppliers should know how they will be judged, and you should not be able to change it after reading the bids. A worked example follows the template.

1. About us and why we are buying

Who you are, how many people and sites, what you do, and the trigger for this purchase (a contract ending, growth, a failure, a new system). Two short paragraphs are enough. Suppliers price risk they cannot see, so say what is awkward.

[Background]

2. What we want to achieve

Outcomes, not solutions: what will be different when this works, and how you will measure it. Leave suppliers room to propose how.

[Outcome 1, with a measure] · [Outcome 2] · [Outcome 3]

3. Requirements

One testable requirement per row, each with an ID. Must = pass/fail: one failure rules the bid out, so only use it for things you would genuinely refuse to do without. Should and Could are scored. Won't goes in section 4. Ask suppliers to answer every row and point to their evidence.

ID	Requirement	MoSCoW	How we will assess it	Your response: Comply / Partial / No	Evidence (page or appendix)
M1	[Must requirement]	Must	Pass/fail		
M2		Must	Pass/fail		
S1	[Should requirement]	Should	Scored under [Q1]		
S2		Should	Scored under [Q2]		
S3		Should			
C1	[Could requirement]	Could	Scored under [Q6]		
C2		Could			

4. Out of scope

The Won't list: things suppliers should not price or propose in this contract. It prevents padded bids and arguments later.

[W1] · [W2]

5. How we will evaluate proposals

Copy these from the Setup tab of the scoring sheet. Fix them before issue and do not change them after.

Stage 1, gates: every Must requirement is checked first. A bid that fails any one of them is not scored.

Stage 2, quality ([70] points): each criterion is scored 0 to 5 by each evaluator separately, then one score is agreed and the reason recorded. A bid scoring below [2] on any criterion, or below [half] of the quality points, is not taken further.

ID	Quality criterion	Weight	Covers
Q1	[Criterion]	[20]	[S1, S5]
Q2			
Q3			
	Total	[70]	

Score	Meaning	What it looks like
0	No answer	No response, or the response does not address the requirement.
1	Major gaps	Addresses part of it, with major gaps or no evidence. Not acceptable as it stands.
2	Partly meets	Meets most of it, with gaps or thin evidence. Acceptable only with changes.
3	Meets	Meets the requirement in full, with credible evidence.
4	Meets, adds value	Meets it in full and adds something we value, with evidence from comparable clients.
5	Exceeds	Goes beyond it with strong evidence and low risk to us. No reservations.

Stage 3, price ([30] points): we compare the total cost over the contract. A total of £[ceiling] or more scores 0; £[target] or less scores the full [30]; prices in between score in proportion. Price is opened only after quality has been scored.

Stage 4: we may invite the highest-scoring bidders to present, and we will take up references and check certificates, insurance and published company accounts before deciding.

6. Commercial terms

State what you will contract on, so bids are comparable and nobody prices in terms you will not accept. Replace the examples with your own.

Term	Our position
Term	[Three years, with a break at 12 months on 3 months' notice.]
Price format	[A one-off onboarding fee; a fixed monthly charge per user; a day rate for work outside the scope. All excluding VAT.]
Price changes	[Prices fixed for the first 12 months; any later rise capped and notified 3 months ahead.]
Payment	[Monthly in arrears, 30 days from invoice.]
Service levels	[The S1 targets, reported monthly, with a service credit when a target is missed two months running.]
Data protection	[Our Article 28 processing terms (gate M2); the supplier is responsible for its own subcontractors.]
Exit	[The S6 exit plan, priced in the bid, with data returned in a usable format.]
Staff transfer	[Bidders say whether they expect the TUPE regulations to apply and on what basis.]
Bid rules	[Proposals valid for 90 days; bidders bear their own costs; we may decide not to award.]

7. Timetable

Working day	What happens
[Day 0]	Issue the RFP to three to five suppliers, with the scoring sheet's criteria, weights and price method in section 5.
[Day 7]	Deadline for clarification questions, by email to one named contact.
[Day 10]	Answers sent to every bidder at the same time, without saying who asked.
[Day 20]	Deadline for proposals. Price schedules go to one person and stay sealed.
[Days 21-25]	Check the gates, then score quality individually; meet to agree each score and record the reason.
[Day 26]	Open the price schedules and calculate the price scores.
[Days 27-30]	Presentations from the top two, reference calls and due diligence (Companies House, certificates, insurance).
[Day 32]	Decision, with feedback to every bidder; give notice to the current supplier if you have not already.
[Day 32 onwards]	Agree the contract and statement of work; onboarding starts on the date in the contract.

8. How to respond

• Answer every requirement in section 3, in the same order and with the same IDs, within [500] words each unless stated.

• Send questions by email to [name, email] by [date]. Answers go to every bidder at the same time; we will not say who asked.

• Do not contact anyone else here about this RFP while it is open.

• Send your proposal and, as a separate file, the price schedule (section 9) to [email] by [time, date]. Late proposals will not be considered.

• This RFP and your proposal are confidential. Proposals must remain valid for [90] days. You bear your own costs, and we are not obliged to award a contract.

9. Price schedule (separate file)

Item	Price (excluding VAT)
One-off onboarding or set-up fee	
Monthly charge per user (or per site / per device: say which)	
Day rate for work outside the scope	
Exit plan (if not included above)	
Anything else we would pay for	
Total over the contract term, on [users] users for [months] months and [days] extra days	

10. Declaration

We confirm that this proposal is accurate, that we have answered every requirement, and that our prices are fixed as stated.

Company and registered number	Name and role	Signature	Date

Worked example: choosing a managed service provider

Kestrel Row Surveyors Ltd (fictional), a firm of chartered surveyors with 38 staff in two offices. All names and figures are illustrative.

1-2. Background and outcomes

Our IT support contract ends in six months. We want one supplier to run day-to-day IT support, security updates and backups for 38 staff across two offices, on Microsoft 365 and our practice-management software. Success: urgent faults answered within the hour, security updates applied within 14 days, a restore tested every month, and a clean exit if we ever leave.

3-4. Requirements and exclusions

ID	Requirement	MoSCoW	How we will assess it
M1	Hold a current Cyber Essentials Plus certificate in the supplier's own name.	Must	Gate: we check the certificate on the official search before scoring.
M2	Accept our data processing terms (UK GDPR Article 28) for the personal data of our staff and clients.	Must	Gate: signed acceptance with the bid.
M3	Use two-step verification on every account that reaches our systems, with no remote desktop open to the internet.	Must	Gate: written confirmation; checked again at onboarding.
M4	Run a UK-based service desk, 08:00 to 18:00 Monday to Friday, by phone, email and portal.	Must	Gate: confirmed in the bid.
M5	Hold professional indemnity insurance of at least £2 million and cyber insurance.	Must	Gate: copies of current certificates.
M6	Currently support at least two clients on our practice-management software and on Microsoft 365.	Must	Gate: client names (checked at reference stage).
S1	Respond to urgent faults within 1 hour and resolve routine requests within 2 working days, reporting monthly against both.	Should	Scored under service desk (Q1).
S2	Apply critical and high-risk security updates within 14 days of release and report monthly on anything outstanding.	Should	Scored under security (Q2).
S3	Back up Microsoft 365 and file data off site every day, test a restore every month and show us the result.	Should	Scored under security (Q2).
S4	Complete onboarding within 30 days of the start date, including a written audit of our systems.	Should	Scored under onboarding (Q3).
S5	Give us a named account manager and a quarterly service review with a written report.	Should	Scored under service desk (Q1).
S6	Provide an exit plan: return of our data and admin credentials, deletion of copies with written confirmation, and up to 5 days of handover help, priced in the bid.	Should	Scored under exit (Q4).
S7	Give three references from clients with 20 to 100 staff, at least one of whom we may call.	Should	Scored under evidence (Q5).
C1	Out-of-hours cover for critical faults.	Could	Scored under added value (Q6).
C2	One on-site day a month, split across both offices.	Could	Scored under added value (Q6).
C3	Phishing awareness training for staff.	Could	Scored under added value (Q6).
W1	Our telephone system: it stays with its current provider.	Won't	Not priced, not scored.
W2	Printers and copiers: they are covered by the lease.	Won't	Not priced, not scored.
W3	Buying laptops: we buy direct; the supplier sets them up under its normal service.	Won't	Not priced, not scored.

5. Evaluation

ID	Quality criterion	Weight	Covers
Q1	Service desk and responsiveness	20	S1, S5
Q2	Security and backups	20	S2, S3
Q3	Onboarding and transition	10	S4
Q4	Exit and data return	8	S6
Q5	Evidence and references	7	S7
Q6	Added value	5	C1, C2, C3
	Total quality	70	
	Price	30	Total cost over 36 months

Price: three-year total of £72,000 or more scores 0; £48,000 or less scores 30; in between, in proportion (each point is worth £800). Quality floor: no criterion below 2, and at least half the quality points.

The result

Bidder	Gates	Quality (of 70)	3-year cost	Price (of 30)	Total	Outcome
Bidder A	Passed	31.4	£57,384	-	-	Ruled out: below the quality floor
Bidder B	Passed	55.0	£68,760	4.1	59.1	Second
Bidder C	Passed	51.4	£59,688	15.4	66.8	Preferred bidder
Bidder D	Failed M1	-	£42,972	-	-	Ruled out at the gates

Sensitivity: Bidder C stays ahead unless price is weighted at 11% or less. If price were scored against the lowest bid instead, and the price pool included Bidder D before its gate failure was applied, Bidder B would come first: one reason we score price against a ceiling and target set in advance.

Next: presentations from B and C, a reference call for each, Companies House accounts and the Cyber Essentials Plus certificate checked, then the contract and statement of work.

Scan for the full guide, the scoring sheet and updates: https://www.itmanagement101.co.uk/rfp-template/

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