

VCC ARBITER OF STUDENT ISSUES OFFICE: Work Product ACCUO: Fair and Equitable RFP Approaches or Alternatives LITERATURE

ALTERNATIVES TO THE RFP PROCESS: SOURCES		
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<p>DIVERSITY, EQUITY & INCLUSION: It's Not You, It's Me: Breaking Up With Your Organization's Inequitable Funding Practices</p> <p>By Erika Grace "E.G." Nelson</p> <p>April 10, 2018</p>	<ul style="list-style-type: none"> ● Bringing the Funding Opportunities to the Community <ul style="list-style-type: none"> ▣ project teams develop a tailored outreach plan for each funding opportunity, with specific outreach to organizations or sectors ... considered to be key stakeholders or who had been markedly absent in previous rounds ● give applicants more time, ... extended ... open application period. In our case, we went from no set minimum to at least six weeks. ● Accessibility. ... using more accessible language to articulate the merits of a viable proposal. ... run a readability test on all RFP language before publication, with the goal of using language that is no higher than an eighth grade reading level. ● ... approached equity from two angles. We set limits on which and when “outside information”—knowledge we have about a project that didn’t come from the application—can be shared during proposal review. ... also started reaching out to new applicants to discuss their work more deeply. ● ...transparency in our decision-making process could only improve the quality of proposals. ... making scoring rubrics available to applicants. ... providing tailored feedback to each declined 	<p>https://www.peakgrantmaking.org/insights/not-breaking-organizations-in-equitable-funding-practices/</p>

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	<p>applicant on how the proposal could have been stronger in hopes that it will improve future submissions.</p> <ul style="list-style-type: none"> ... keep asking for and responding to feedback from community and know that correcting mistakes is part of improvement and part of ensuring our processes continue to be ones that facilitate, rather than undermine, diversity, equity, and inclusion. 	
<p>Putting Equity in the RFP Process</p> <p>By Nicole Clark,</p> <p>July 15th, 2021</p>	<ul style="list-style-type: none"> if there's someone you think is a good fit for a future project, request time to speak with them. Get to know them, the projects they like working on, and discover if you're mission aligned. The best time to look for a consultant is before you need them. ...[disclose] the budget. while most consultants develop work scopes based on current or previous work, this doesn't capture the uniqueness of your organization and project. ... creating a proposed work scope is akin to peering into a crystal ball to decipher what you think the organization wants to hear. Yes, you can contact the organization for clarity, but nothing beats working together to develop the work scope. "Creating a proposal, getting documents together, submitting them, going through 1-2 interviews, sometimes being asked to update the work scope and budget plan based on new information given in the interviews (I was asked to do this once), and doing a final interview. This is a lot, and many consultants are pushing back against it. ... However, organizations should challenge themselves to determine how these steps can be condensed. What would be the best use of the consultant's (and your) time? 	<p>https://nicoleclarkconsulting.com/putting-equity-in-the-rfp-process/</p>

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	<ul style="list-style-type: none"> I keep getting asked to submit RFP [responses] for consulting work, but these people don't actually want to work with me. They want to check a box that says they recruited consultants of color so they can justify their ultimate choice of a white consultant...If someone wants to build an authentic relationship with me, really values my insights, cool...But my time and energy is too valuable to waste on box checkers. asking hired and non-hired consultants for their feedback on a RFP process is crucial to understanding what organizations can do to make the process more equitable. 	
<p>Do RFPs Gel With DEI? Let's Re-Evaluate The Cost of Doing Business</p> <p>By Dr. Sarah Saska & Chantal Hansen</p> <p>February 17, 2022</p>	<ol style="list-style-type: none"> They are rarely designed collaboratively. Those seeking services must learn about the root of DEI work before engaging with vendors. Those seeking services should encourage co-design and create opportunities for practitioners to collaborate. They rarely reflect an organization's *actual* needs. Those seeking services should provide the appropriate insight into their needs. This may require the RFP to be written by someone intimately involved in the project or within the same department. When designing a RFP, use subheadings and bullet points, so the document is more scannable and easier to digest. Those seeking services should consider the vendor's expertise and forge a path together. Discuss what timelines are feasible and come to an agreement together. It encourages a "race to the bottom" approach if they don't include a budget range. Always provide an initial budget range and stick to that range. Don't encourage a bidding war for the cheapest proposal. Don't make it about supply and demand in a field that values community work. They are uncompensated and financially inaccessible for many. Those in need of services should not request that vendors provide a substantial amount of free labour. They need to treat vendors with respect for their time." 	<p>https://www.feminuity.org/post/request-for-proposal-rfp-unpaid-work-in-equity-business-consultants-consulting</p>

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	<p>5. They request too much time and effort. Instead of causing migraines with an inordinate amount of open-ended questions, those seeking services may want to consider asking vendors for work samples and maybe just a few short-answer questions.</p> <p>☐ "We recognize that, in the current climate, there is increased reliance upon consultants and firms led by BIPOC; and that answering a request for proposals takes thoughtful time and energy away from your business. Mozilla would like to ease the submission requirements for this request for proposals. Rather than requiring a lengthy, unique proposal, we're asking you to submit the above information along with an existing work sample that you feel represents a similar work you've done for another client. This way, we can gauge your level of expertise and the quality of output without the burden of creating extensive new material related to this submission." - Mozilla Foundation."</p> <p>6. They don't protect people's intellectual capital. Add a protection clause or explain what you will do with the info that has been shared. Don't use RFPs to shop around for ideas. Don't grab a more expensive vendor's idea and hire a cheaper vendor to implement it.</p> <p>7. They can be too jargon-y. Use plain language and familiar words. Simple is kind. Spell out acronyms.</p> <p>8. Avoid paywalls. Try not to share opportunities behind a paywall; check out sites like Charity Village, Bids & Tenders, and InstantMarkets.</p> <p>9. Sometimes, they are simply rigged. A "baked" RFP is one that already has an incumbent winner." Don't do this.</p> <p>10. They often lack capacity building. Ensure the work handoff is considered within the RFP's budget to ensure capacity building, sustainability, and buy-in. Ensure team members are not just assisting off the side of their desk. Train them to champion the work.</p>	

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<p>Is the Request for Proposal in Procurement Dead?</p> <p>By Bhanushee Malhotra</p> <p>MAY 27, 2022</p>	<ul style="list-style-type: none"> ● Joint solutioning sessions – The buyer and selected suppliers work collaboratively to develop a solution to address a business problem or opportunity. As an example, a leading agriculture company conducts regular solutioning workshops with suppliers to shape requirements for white space IT Research and Development (R&D) solutions. ● Pilots – Running a pilot with a supplier to test a new concept/model ... Run pilot projects with suppliers before awarding additional spend ● Reverse auctions – Traditionally used to source simple services or goods, reverse auctions are becoming increasingly popular in outsourcing services. However, the complex and dynamic nature of e-auctions requires robust technology and advanced supplier training. ● Share a standard list of obligations in the pre-contract phase ● Provide suppliers with all details, accessorial charges, and potential changes during the RFP process ● Initiate supplier discussions earlier and more frequently ● Conduct one-day supplier workshops instead of lengthy discovery and selection processes ● Reduce multi-page proposals to single-page templates to clearly explain requirements and engagement ● Keep suppliers involved for as long as possible. Procurement can discuss terms and conditions with all suppliers, not only the ones they will contract with ● Run the initial round of negotiation and contract drafting in parallel to the sourcing process ● Ensure constant interaction occurs across the sourcing lifecycle between the buying organization and the supplier to develop the contract collectively and incrementally 	<p>https://www.everestgrp.com/blog/is-the-request-for-proposal-in-procurement-dead.html</p>
<p>Alternatives to the RFP Process</p>	<p>Discovery RFP. Clients pay an agency to act as a quasi-consultant to get an outside perspective on the business' marketing strategy and uncover insights about the internal marketing processes. The output of a</p>	<p>https://setup.us/blog/alternatives-to-the-rfp-process</p>

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<p>By</p> 	<p>discovery RFP is called an “artifact” which is a report containing raw data, analyses, and a summary of the agency’s findings.</p> <p>Role Play With A Sample Project. offer to pay for a minor project that allows a chance to develop chemistry and think through ideas as a team. Giving a sample project to an agency exposes the client to the strategic and creative process of the agency firsthand.</p> <p>Talk Through The Project With Partners. Invite a selection of agencies with the necessary expertise that are within budget to brainstorm solutions. Fairly compensate the leaders for their time and award the agency that has the best ideas with a partnership. Try to maintain a relationship with the other agencies for future work.</p> <p>Seek External Referrals. Use references from trusted sources such as team members with past agency connections, current network</p> <p>A Detailed Request For Information (RFI). RFIs act as “fact-finding” documents since the client may have very little knowledge of what is needed to solve marketing challenges. Asking the agency to answer questions about their qualifications and offerings and providing case studies and examples of work often results in an easier way to narrow the pool. A partnership may not sprout from an RFI, but the process helps the client better articulate their ask and exposes them to qualified, reliable agencies for future work. ... If an RFP is a necessary procedure, make sure to articulate the needs in as much detail as possible and have a transparent conversation with the agencies under consideration to lay out expectations.”</p> <p>“The Do’s of the RFP Process</p> <p>BE SPECIFIC</p> <p>For the most effective solutions, clients need to clearly outline the company’s goals, needs, budget range, and limitations in the RFP. It is important to be as detailed as possible without restraining the agency’s innovative proposed solutions.</p>	

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	<p>ASK QUESTIONS</p> <p>The whole point of the RFP is to select the best agency for the job. Choosing the lowest bid may not lead to a beneficial decision or healthy agency-client relationship down the road. Ask in depth, thorough questions to get a feel for the agency and their capabilities. Removing the pricing data from the equation during the evaluation process may help remove bias.</p> <p>Engage in meaningful discussion with the list of possible vendors. The agency benefits from counseling the client by showing off their expertise and forming a foundational relationship with the client and the client receives extra help in achieving their objectives.</p> <p>GIVE LEEWAY</p> <p>A section for alternative solutions allows the agency wiggle room to go beyond the ask, push creative boundaries, and display their abilities without any limitations.</p> <p>RESEARCH</p> <p>Before submitting the RFP, clients should collect preliminary research from diversified sources - internet searches, industry experts, colleagues, even Setup - to validate whether or not the agency prepared a fairly priced and reasonable proposal.</p> <p>BE PATIENT</p> <p>The initial conversation with comprehensive questions may help the client select a qualified and fitting agency, but, with every new relationship, it is natural to encounter hiccups. The client must understand the limitations of bringing in a new partner and be patient. When onboarding the agency, be sure to provide context of the internal dynamics and processes of the company and where the agency fills gaps.</p>	

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	 <p>The Don'ts of the RFP Process</p> <p>CREATE RFP FODDER</p> <p>If the brand already knows which agency they would like to work with, then they should not waste other agencies' time with an RFP process. RFPs take a significant amount of time, effort, and resources for the agency - work that they could devote to their current clients. Stringing them along is more hurtful than helpful.</p> <p>REQUEST AN RFP WITHOUT B.A.N.T.</p> <p>Before creating an RFP and evaluating any vendor options, brands need to sit down and detail everything - the budget, authority, need, and timeline - or B.A.N.T.</p> <p>The more the client knows about themselves, the more prepared they are to ask for assistance.</p> <p>FOCUS SOLELY ON PRICE</p> <p>Getting caught up on the lowest price can distract the client from choosing the agency that is best suited for the project at hand. Determine an ideal cost range and focus on the agencies that are reasonable for that range. Investing in a quality idea from the beginning could save money in the long run.</p> <p>HIRE AN AGENCY WITHOUT CORE CAPABILITIES THAT MATCH NEEDS</p> <p>In order to make viable recommendations to the client, the agency should not have to lean on a third party product or integration to have a core understanding of the business. Hiring an experienced agency that isn't learning on the client's dime will ease the process and lead to a more successful partnership.</p>	

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	<p>REQUEST SPEC. WORK</p> <p>While requesting “spec. work” (work to solve the marketing problem without pay and before discovery) may seem like a good way to “understand how the agency thinks,” it is not beneficial for either party.</p> <p>Agencies waste a lot of time and effort on spec. work which is, essentially, free work for clients. Spec. ideas are vulnerable to theft by the client and rarely fully represent the agency’s capabilities. Because multiple conversations and processes go into understanding the client’s business, the minimal collaboration between agency and client leads to spec. work that often misses the mark. Agencies often just execute the client ask rather than expanding boundaries and finding real solutions.</p> <p>By asking the agency to take part in the silly charade, the client risks receiving poorly fleshed out ideas and scaring away capable agencies.</p> <p>Click here to learn everything you need to know about the RFP process (& access our free RFP template!).</p>	
<p>Why RFPs Aren’t Good for Anyone Making the case for a better approach to selecting agency partners</p>	<p>A Better Way to Choose a Strategic Partner</p> <p>Instead of the time-wasting, fuzzy RFP slog, there’s a different way — a way that will yield fresh, effective, co-created ideas and will make the process a hell of a lot more exciting for everyone involved.</p> <p>1) Hop on Zoom and have a conversation with humans. Talk to potential agency partners about your organization, your project, and what’s keeping you up at night. Trust your instincts; you know when the chemistry is right when you talk to someone. You know when there’s enough common interest to want to jump into a working relationship. If an agency’s experience, expertise, and interest in being your partner isn’t obvious to you after you talk to them, or if they’re not exactly what you’re looking for, it’s better for both parties to be honest about it early on rather than go through the cumbersome and forced process of lengthy courtships and proposals. No hurt feelings.</p>	<p>https://www.hyperakt.com/insights/why-rfps-arent-good-for-anyone</p>

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<p><i>By Sruthi Sadhujan, Deroy Peraza</i></p>	<p>Worried about verifying credentials? Agency websites showcasing past projects, personal referrals, or past client testimonials allow you to do that.</p> <p>Worried about prices? If you're comparing analogous firms (similar size and market), pricing is going to be about the same give or take 10% to 15%. If you're comparing vastly different firms (very small vs. huge or firms with different expertise), you'll obviously get very different responses. This approach is usually indicative of the fact that you haven't properly defined your project or your team lacks understanding of the agency landscape. Both of these will put you in a bad position to choose the right partner, which is yet another reason why it's better to rely on exploratory conversations rather than formal proposals.</p> <p>2) Start with Discovery instead of diving into the full project. If you're going through the trouble and time of putting together an RFP, you are probably ready to invest a substantial amount of money on your project. If you're about to spend \$100K to \$300K on a project, it's understandable that you want to be confident in choosing the right partner, but an agency's RFP response, much like an individual's college GPA, isn't going to give the sense of security you're looking for. There's no better litmus test than working with the agency partner your instinct is pointing you toward, but you can start small. Rather than engaging in the full project scope, contract them for a narrower Discovery scope. The objective of this engagement is to conduct all the necessary research (landscape, audience, creative, etc.) to properly define your project's objectives and opportunities. This is work you're going to need to do anyway. Doing it as an initial engagement grants you the double benefit of letting you test out the working relationship and setting you up to invest in the project you really need rather than the one you thought you needed. At 10% to 20% of the overall project budget, you're effectively removing most of the risk of investing your full budget in the wrong project with the wrong partner.</p> <p>Relationships Don't Start on Paper</p> <p>Just as you wouldn't choose a life partner solely based on their qualifications on paper, you shouldn't choose a creative partner that way. And we mean partner — this is a significant relationship. Our clients talk about working with us as therapeutic. They tell us about what they are struggling to achieve, the</p>	

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	<p>pressures they are facing from the board or from competition, a constant race to keep up with technology standards, a lack of alignment among staff about purpose and values. Almost always, they hit a point where they have to wrestle with deeply existential questions of who they are and how they fit into this world.</p> <p>The RFP process is far too impersonal, abstract, and clinical to yield a deep relationship with an agency that's passionate about and committed to advancing your cause. The organizations that sidestep the RFP process and choose to work with us are ready to have a different conversation. They demonstrate they're excited about finding a way to work together and inherently trust in our expertise. This public display of affection immediately makes us feel more committed and excited about finding a way to work together. In the end, it leads to deeper relationships, more immediate trust — and more effective work.</p> <p>What do you think? Do you think that RFPs are a necessary evil? Or have you been similarly frustrated by gazillions of hours that go into writing the RFP and reviewing all of the responses?</p>	
<p>3 Must-Haves When Requesting Proposals from DEI Consultants</p> <p>By Minsun Byun Kevers</p> <p>Jan 25, 2022</p>	<p>Based on our findings, here are Top 3 Recommendations for organizations looking to engage with external DEI consultants:</p> <p>1. Make sure you share your budget - <i>Among the 100 RFPs we studied, only 41% included a budget guidance. Many organizations inappropriately use the proposal process to figure out how much they should budget, leading to a lot of wasted time for the organizations and for the consultants. Writing a proposal takes a lot of time and effort on the consultants' side. Without the budget info, it is difficult for consultants to determine the opportunity size and decide how much time and resources to dedicate. Not being clear about your budget can lead to consultants having to guess at the lowest price or opting out of the proposal process altogether. If you don't have an exact number for your budget, at least offer a budget range. If you have no idea what your budget should be, don't start with the proposal process. Do more work internally to figure out how much money you can dedicate. Ask your peer organizations. Or if you ask a consultant for guidance around how much to budget, be upfront about the intention and pay for the consultation. This is particularly important for when you want to work with solopreneurs and smaller consultancies who often lack the kind of overhead that</i></p>	<p>https://www.linkedin.com/pulse/3-must-haves-when-requesting-proposals-from-dei-minsun-byun-kevers?trk=articles_directory</p>

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	<p>large-scale consultancies have. If your organization is serious about supplier diversity and pay equity, make sure you are upfront about your budget.</p> <p>2. Be clear about your timeline - <i>Nearly a quarter of the RFPs we examined did not offer any guidance around project time length/duration.</i> Not surprising this information is critical for consultants when evaluating different engagement opportunities and planning their workload. If you have no idea how long the work should take, do more work internally to figure it out. Ask others. Or hire a consultant to help you properly scope out the project and write the RFP and compensate for that work. This timeline not only applies to project start/end time, but it also applies to the timeline of your search and evaluation process. We often hear horror stories around organizations who approach the initial proposal process with a life-or-death urgency and the consultants never hear from them again. Being ghosted after a time-consuming proposal process can be very costly to consultants, particularly for solopreneurs and small consultancies. DEI consulting space is a small world. Every interaction you have with consultants during the engagement process makes up your organization's brand. Be clear about your timeline and commit to that timeline when requesting proposals from consultants.</p> <p>3. More acknowledgement and respect - As expected, most RFPs we studied involved highly customized strategy work to address complex organizational concerns and required on-demand support that's difficult to quantify as hours. Consultants are often asked to share a lot of details around their methodologies, tools, templates, strategies, work plans, training material and unique insights in their proposals. No guarantees for the work. No protection for the proprietary information they shared. This may sound far-fetched, but we even found RFPs that listed the exact project deliverables (what is expected at the end of the 6 month or 1 year long project) as part of the proposal requirements. This kind of unfair and extractive practice must stop. It is important for organizations to acknowledge and respect the time and the resources consultants will need to invest and the proprietary information they share during the proposal process. You should have a confidentiality agreement built into your process as a baseline and be very mindful about how you share or use that information. Lastly, ask yourself if each submission requirement is indeed essential to finding the right partner. It may be critical to know if the consultant has successfully worked on similar projects in</p>	

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	<p>similar sectors as your organization. Then simply ask for past work samples instead of a fully spelled-out solution offering customized to your organization's needs. That's what the actual project is for. Here's an example we found in our research of RFPs that captured one organization's acknowledgement and respect for the consultants and the process:</p> <p><i>"We recognize that, in the current climate, there is increased reliance upon consultants and firms led by BIPOC; and that answering a request for proposals takes thoughtful time and energy away from your business. Mozilla would like to ease the submission requirements for this request for proposals. Rather than requiring a lengthy, unique proposal, we're asking you to submit the above information along with an existing work sample that you feel represents a similar work you've done for another client. This way, we can gauge your level of expertise and the quality of output without the burden of creating extensive new material related to this submission."</i> - Mozilla Foundation</p> <p>We don't need a ground-breaking, never-done-before type of innovation for more equitable and successful RFP processes for all. Rather, these are small adjustments organizations can make in their engagement process that can lead to big impact, making the efforts worthwhile for more impactful consultants to partner with your team.</p>	
<p>RFP Do's, Don'ts and Alternatives</p> <p>By Nick Jiwa October 5, 2018</p>	<p>Alternatives to the Same Ol' RFP</p> <p>As an industry, we continue to implement RFPs the way that they have always been done. Does this mean that we should still use workforce management practices or ACD technology from the 1990s? If we can adapt to changing processes and technologies, then we should also be capable of adapting to newer and better vetting practices. We don't have to default to the same old way of doing things. A better approach is to isolate the components of the RFP process that work effectively and combine them with newer and better methods of vetting talent. For example:</p> <p>Speed Dating Gather your short list of vendors and send them a brief RFI—Request for Information, requiring basic info. Next, schedule a video conference that poses a series of additional questions to the vendor. Give them a</p>	<p>https://www.customerserv.com/blog/rfp-dos-donts-alternatives</p>

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	<p>maximum of 2-3 minutes to respond verbally to specific questions. The questions could range from basic to situational (e.g., “What would you do if ____?”). This process helps clients to put faces, voices and personalities to the vendors’ responses. It also tests the vendor’s ability to articulate services and solutions in an unfiltered and unrehearsed way. Using this approach can also help the client to judge whether the vendor’s participants are all on the same page. Are they authentic? Are they answering questions naturally and with confidence and verve? Or do they lack conviction?</p> <p>Pre-RFP Meeting Once you’ve collected a short list of vendors, invite each vendor to visit you in person for a pre-RFP meeting. During the visit, the vendor will get to immerse themselves in the client’s call center (if internal), process, culture and way of doing things. Post-meeting, administer an RFP so that the vendors can respond intelligently based on a more informed understanding of the client’s requirements.</p> <p>A Call Center SAT Test Instead of an RFP, create an SAT-type test that asks the vendor a series of “what-if” questions. It’s best to narrow your list of vendors first. Then, brainstorm internally to develop a series of situational questions that will help to extrapolate the “inner vendor”, instead of the typical gloss and shine responses. For example, “What if you are staffed at ____ agents and your service levels are ____ when they should be ____? What is your process to take corrective measures, and who is responsible for executing your plan and communicating with the client?”</p> <p>Scope of Work Send a short list of prequalified vendors a scope of work (SOW) describing your business needs in detail. Then ask each vendor to come up with a freehand creative response to your SOW. Provide vendors with a few required guardrail questions so that responses follow a consistent format, however, let the vendors determine how they want to respond and what additional information they feel it is necessary to include.</p> <p>A Site Visit RFP Conduct the bulk of your RFP questions at the vendor’s site. Start by sending your broader list of vendors 10 questions maximum and come up with a weighted score for each question depending on your key</p>	

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	<p>selection criteria. Then, after scoring their responses, schedule site visits to your down-selected vendor(s). Take stakeholders to the site visits, and plan on spending 1-2 days at the vendor site. Set the agenda for the visit and send the vendor a more detailed list of questions that you want answers to on-site. This process enables the vendor to “show you,” not just “tell you” how they operate.</p> <p>A Reverse RFP Yes, this sounds counterintuitive but why not? In traditional RFPs, the Q&A process allows vendors to ask questions. The RFP captain at the client compiles the questions, obtains answers and provides the vendor with a codified Q&A. So why not make this the RFP? Allow a short list of vendors to ask no more than 10 questions each about the client’s business needs, then provide a proposal to the client. Clients can evaluate vendors on the types of questions asked and the strength of each proposal received.</p> <p>Video RFP Allow vendors to produce their own videos instead of responding to a list of RFP questions. Give vendors the opportunity to create a five- to 10-minute video that tells their unique story. Allow the vendor to get as creative as they want within the framework of the client’s guidelines on required topics, suggested topics and parameters on the length of the video.</p> <p>RFP = Request for (Fill in the Blank) In the end, if all the stakes are on the table, and all other boxes are checked, what are clients really looking for in a vendor today? Culture, transparency, innovation, follow through... I could go on. The call center industry has undergone a profound transformation during the past two decades—emerging into a highly visible touchpoint representing the human face of the brand. More care and attention need to be paid to the process for identifying and selecting a vendor partner that is the best match for an organization’s mission, vision and values. It is a distinctive role, which demands a more unique, creative approach to fulfill—perhaps we should think of it as a Request for People... or Passion... or Personality. <i>Don't miss a beat. Sign up for the CustomerServ blog.</i></p> <hr/>	

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ALTERNATIVES TO THE RFP PROCESS: SOURCES

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<p>Why RFPs are a bad idea and what to do instead</p>  <p>Posted by Ethan Clarke October 15, 2019</p>	<p>RFPs, Social Justice and How to Do Better</p> <p>A better way of doing RFPs is with a Request for Statement of Interests. This is a process wherein you put out a public call for vendors, stating that your organization is interested in working with vendors within a specific domain. You can state who you are, and the basic parameters of the work. You do not need to know the full scope of the work at this point, just your general goals and what sort of working relationship you are looking for. You can also ask for a portfolio of work, though not references. Organizations will learn about the folks and skills available in their community, while vendors have not had to invest a ton of hours writing a fully-fleshed out proposal.</p> <p>Once you have a list of interested vendors, you narrow the field by picking the vendors you'd like to have a call with. On this call, your goal is to learn more about the company and how they work. Do they understand your goals? Do they understand what you mean when you talk about your work? After these calls have yielded a couple of vendors you feel comfortable working with, have a discovery meeting with them. During this meeting, vendors will be encouraged to ask all the questions they need in order to understand the goals you have and how they can help. Then, vendors will be asked to create a formal proposal explaining how they would work with your organization in order to meet its goals.</p> <p>Functionally, this document will look very similar to a response to an RFP, with a few key differences. While allowing vendors to propose creative solutions, it's important that you press vendors to be specific. They should provide clear deliverables and key milestones. Second, you are only asking this work to be done by vendors who have a realistic chance of winning the contract. Since you've had these more in-depth meetings, you may be tempted to only solicit a bid from the one vendor who seems most likely to deliver an acceptable proposal. In some instances, that may be appropriate. Usually, in the interests of transparency and hiring the best vendor for the job, you are best off soliciting proposals from two vendors so you can compare the approaches and ensure the final scope covers everything you need.</p> <p>In order to acknowledge the losing vendor's unpaid labour, your project budget can include an honorarium. This should represent a standard hourly rate for at least a few hours (more if your project is particularly complex or if travel was required for meetings). Vendors put a lot of thought and effort into giving you their input for your project. This input is often valuable for the organization, and so the honorarium can also be seen as a way of compensating vendors for providing a service to the organization.</p>	<p>https://www.canadianfreelanceunion.ca/rfps</p>

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	Using a Request for Statements of Interest you will not only result in a better working relationship with vendors going forward, they also contribute to a more just working environment for everyone involved. Consider experimenting with a Request for Statements of Interest for your next project.	
<p>Pros and cons of non-RFP vs. RFP procurement process: The decision to use an RFP procurement process or skip it rests on each companies' unique needs. Understand how each method works and why each has its own pros and cons.</p> <p>By Eric St-Jean 29 Apr 2020</p>	<p>What is a non-RFP process? Some companies prefer to simplify the process and avoid using RFPs altogether. Instead, their project leaders conduct their own research and identify vendors who they believe are best positioned to meet their needs. Vendor interactions, detailed requirements and published timelines are less formal. There is also less emphasis on making the process transparent and more on identifying the best ERP system for the job at hand. In some cases, the decision to go with an RFP process vs. a non-RFP process is clear-cut. For example, a company may require RFPs for all projects or those over a certain dollar amount. But where the decision is murkier, it's important to understand the pros and cons of the RFP procurement process as well as the pros and cons of skipping a more formalized ERP selection process.</p> <p>Cons of a non-RFP process For all its rigidity, an RFP procurement process -- or another formalized process -- can provide standardized benchmarks as well as other benefits. In contrast, skipping an RFP for a looser software selection process can mean missing out on important benefits. Here are a few downsides of a non-RFP process.</p> <p>Invites nepotism. Personal relationships may influence the evaluation process instead of how each vendor meets the requirements. For example, the head of the evaluation committee may select a vendor because a friend or relative works there.</p> <p>Difficult to defend in lawsuits. The non-RFP process is not stringent -- in particular, the rules for communicating with vendors are lax. As an unintended result, it's entirely possible for a company to give one or more vendors preferential treatment. An evaluation committee might also reject a vendor due to bias, such as on the basis of an employee's race or sexual orientation -- which can leave the company vulnerable to a lawsuit.</p>	<p>https://www.techtarget.com/searcherp/tip/Pros-and-cons-of-non-RFP-vs-RFP-procurement-process</p>

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	<p>Overlooks good vendors. If the evaluation committee members don't have preset guidelines or adequate knowledge of the industry, they might not identify vendors who offer a platform that meets the project's requirements.</p> <p>Prone to delays, skipped steps and missed requirements. In an RFP, a set schedule is laid out for responding vendors. With no strict schedule to follow, vendors may unintentionally cause delays in the project. A less formal process may gloss over -- or even skip -- important steps, such as clearly defining the project's requirements or getting feedback from a wide enough user base. Rushing the project forward could result in an over-eager member of the evaluation committee speaking to vendors or receiving proposals before the project receives approval.</p> <p>Misses out on representative views. The evaluation committee may only contain employees from a specific department or team. As a result, the committee may be unaware of how their decision affects other employees. In a worst-case scenario, the committee may even ignore the feedback from affected employees. Regardless of which approach the evaluation committee selects, there are ways to ensure an unbiased process. The evaluation committee should include employees from different departments, such as finance and IT, and an executive sponsor should oversee the whole project.</p>	