

# **Preparing Undergraduate Students to Write Request for Proposal according to the top University Business Schools**

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## **Abstract**

This study examines the Request for Proposal document with an emphasis on the Project Scope section as this is a major gap in writing an RFP. In order to analyze the RFP composition, guides and samples from business schools and government agencies will be used along with a practitioner interview. From these interviews we found that the RFP has an introduction, a scope of the project section, deadlines for submission section, bid selection timeline section, selection criteria section, a budget, and an obstacles section. These patterns were mostly compliant in the business schools RFP sources, government RFP sources, and the practitioner interview.

**Keywords:** Request for Proposal, RFP, Business Schools, Negotiation Document

## **Introduction**

The Request for Proposal otherwise known as RFP is a document which many business, economics, and finance practitioners write in order to outsource projects and negotiate with clients or vendors. RFP documents are important because they are used for companies to compare potential companies which can complete projects the best. RFP documents can scale from industry to government however many samples of these documents are confidential due to their bargaining role and contract involvement. As a current undergraduate student at University of California Berkeley I do not have access to documents of the private sector which includes most companies and am limited to public materials. Due to limited access to samples of RFP documents this study will serve more similar to a pilot in which methodologies can be used to analyze RFP more thoroughly with more resources. Although the RFP document is essential to many careers in economics, finance, and business fields, there is no formal training on how to write this document. Certain sections of this document require more writing ability such as the project scope which will take focus.

## **Methodologies**

In order to start my investigation concerning the Request for Proposal, I decided to look for RFP samples and guides from the top eight business schools ranked by the US News Ranking. I chose to cut off at the top eight universities rather than five in order to accommodate for a lack of data from universities on the list. Following this I wrote down this I searched for the business school name and RFP. Making the search simple would retain more relevant searches as when a search consists of more words there is more chance that irrelevant searches appear. The schools which I found as the top eight were the University of Chicago Booth, University of Pennsylvania Wharton, Northwestern University (Kellogg), Stanford University, Harvard University, Massachusetts Institute of Technology, Yale University, Columbia University, and the University of California Berkeley HAAS.

Following the initial search of RFP from the top eight business schools, I searched up “RFP guides” in order to find guides which were not from business schools but the typical searches people find when they would like to quickly learn the RFP. These guides were used similarly to a control whereas the business school RFP served as the study group. In addition to this I searched “RFP samples” in order to assist with this function of a controlled experiment in which the guides, I also looked up samples with a generic search which was “RFP samples.” The generic samples and guides were selected via relevance and availability however materials were intended to be kept between 2018 to 2022 in order to ensure we analyze current RFP.

After the collection of RFP samples and guides from, I looked at their components as the samples, and guides all seemed to list and discuss components of the RFP which I then compared in order to see whether there was a general consensus regarding how specific data from business schools and government sources argue the RFP should be written. Similarities amongst them which would allow us to find how to write an RFP well.

Next, I contacted people of the business, finance, and economics fields which regularly write Request for Proposal documents. Out of these people I was able to successfully host a fifteen minute interview with John Zhao from the Profit Recovery Partners LLC. In the interview I asked: “What are the most difficult parts of writing the RFP?”, “What are the sections which make up the RFP?” , and “What is the RFP used for?” This data was collected and checked in order to verify my previous data on how RFP are written through the use of an expert’s insights.

### **Findings and Discussion**

After having looked at all of my data which includes the guides and samples listed below, most if not all sources collectively agree that the Request for Proposal has seven components which are an introduction, a scope of the project section, deadlines for submission section, bid selection timeline section, selection criteria section, a budget, and an obstacles section. These components will be discussed separately along with their findings in sections for organization purposes.

| Source / University Name           | Quantity of RFP Samples | Number of RFP Guides |
|------------------------------------|-------------------------|----------------------|
| University of Chicago Booth        | N/A                     | N/A                  |
| University of Pennsylvania Wharton | N/A                     | N/A                  |
| Stanford University                | N/A                     | 1                    |
| Harvard University                 | N/A                     | 2                    |

|  |     |     |
|--|-----|-----|
| Massachusetts Institute of Technology  | N/A | N/A |
| Yale University                        | N/A | 1   |
| Columbia University                    | 1   | N/A |
| University of California Berkeley HAAS | N/A | N/A |
| Government Related                     | 5   | 2   |

## 1. Introduction

Through the use of samples from prestigious business schools and government agencies, we can observe that Requests for Proposal documents start with an introductory section. It is the first impression which allows the user of the RFP to present itself and give some background on who they are. This section is not meant to go anywhere in depth as to what the company projects. An example of this is demonstrated in the Columbia RFP sample. In this example representatives are introduced which is typical of an RFP as the people in charge are named. The contact information of the Columbia representatives is included. The Environmental Protection Agency in which the sample from the Center for Planning Excellence also abides by the writing of the introductory section by introducing itself, the CPEX, its background, and its intention. Although the second sample EPA RFP from the city of Rockville does not include an introduction, it states that it is an updated RFP for a project therefore emphasizing that a deal is already made and no introduction is necessary.

The introduction section is also discussed in the same way by the guidebooks. An example is present in Kate Churkina's guidebook which states the introduction should include "founders, board, executives, mission statement, what your business does, how long you've been in operation, and anything else [deemed] pertinent to know about [a] brand or product" is discussed. According to the Harvard Kennedy School of Government the RFP writing should begin with the problem section which is just another word for an introduction. The guidebooks describe this section as an opportunity to "[connect] to goals" via "[illustrating] [the] gap between [the] current and desired state." When interviewing with John Zhao, he described the introduction section as "the component of the RFP in which a company introduces the mission which can be valued as this helps whoever is comparing RFP to see which values align with theirs." This follows the trend of introducing companies to demonstrate their values and identity to win clients or vendors in the beginning.

## 2. Scope of the Project

Through the use of samples from prestigious business schools and government agencies, we can observe that Requests for Proposal documents include a Scope of Project section. This section is

of the most granular as this is where the user of the RFP explains qualifications and how this project is to be made. The Scope of the Project is stated by many practitioners such as John Zhao as the most difficult part of the RFP because it involves the most negotiation. The Scope of Project selection is typically where the ability to write this well puts practitioners apart from others. In the Columbia University RFP, many sample websites are presented to ensure companies know what they are required to be able to do when taking the job of creating websites. This demonstrates Columbia's care for this section as examples are clearly represented which make the RFP extremely specific. John Zhao states "RFP documents can be written by a vendor or customer and the components and writing are identical." This Project Scope explains what is being asked of in this case but can also come from vendors presenting a service to a customer. John Zhao says he primarily uses the RFP for negotiating with clients in asking the client if they can engage with their vendors to negotiate better contract rates. Furthermore the Rockville RFP is the largest section of the entire RFP, in addition to this project of building Commons includes "1,595 residential units, 325,000 square feet of commercial space, 220,000 square feet of retail space, 2,409 private parking spaces." This example demonstrates the extreme precision in measurements taken in this section furthermore pushing this section as scrutinous yet important.

Through the use of guides from prestigious business schools and government agencies, we can observe that Requests for Proposal documents include a Scope of Project section. The Harvard Kennedy School of Government highlights the importance of this section by the proportion of the Project Scope discussion in its guide. The guide breaks the RFP writing into four sections of which this one has its own section being  $\frac{1}{4}$  of the total writing. Furthermore Chirkina says that "being as detailed as you can in this section of the request for proposal will weed out those contractors who don't meet some basic qualifications for the project." Many of the guides describe this piece like a resume when applying for a job as writing this well can greatly increase selection chances. This is the section in which discussing the project should be done in most detail.

### 3. Deadlines and Submission Dates

Through the use of samples from prestigious business schools and government agencies, we can observe that Requests for Proposal documents include a Deadlines and Submission Dates section. The deadlines section is a rather minor section in RFP documents as it is almost robotic in the sense that practitioners only plug in information without much writing. This section only serves to make bidders aware of contract start and end date. The Columbia RFP includes "Due Date/Time: January 20, 2023." This is further emphasized by the Rockville RFP which has "3:00 PM, FRIDAY, DECEMBER 8, 2006" and CPEX RFP which has "Monday, September 26, 2007 by 5:00 p.m. CST." These deadlines are short and do not require much writing in the RFP.

In addition to the previous examples further examples from guides include the Stanford University RFP which has “*Deadline: December 2, 2022*” and Harvard University which has “*Deadline for Short Proposal submission: June 29, 2022.*” Further examples from the other guides include Watts and Schiff’s guide which states “Vendors need to quickly know your requirements,” therefore making this section brief.

#### 4. Bid Selection Timeline

Through the use of samples from the best business schools and government agencies, we can observe the RFP Bidding Timeline. This section does not include much writing, many times it is merged with the deadlines section as they are similar. The main differentiation from the former is that this section discusses the steps to bidding. The Columbia RFP Bid Selection Timeline includes “Questions must be received no later than December 16, 2022.” More examples include: CPEX RFP which has “Teams are expected to present in Louisiana the week of October 8, 2007,” and the CPEX RFP which has “pre-proposal meeting on Tuesday, November 14, 2006 at 11:00 a.m.” We can see more due dates however these are sequential depicting a process in the bidding process.

In addition to samples, the guides also discuss a bid selection timeline as a part of the RFP writing process. Examples from guides include Churkina’s guide which states this section is to help both your business and contractors juggle multiple bids for multiple projects. ” This section is described by Churkina as a “courtesy to your bidder.” The word courtesy does not make this section seem so important or crucial in getting selected for a project. Pinegar’s guide follows up these points by stating “a project overview will help agencies determine if they’re the best fit for the job.” The guides seem to highlight writing this section well as being a make or break to getting contracts. When writing this it is best to be detailed about every detail regarding qualifications of a team, experience, ability, skills, and plans. The more details present here will distinguish an RFP from the rest.

#### 5. Selection Criteria

Through the use of samples and guides from top business universities and government sources, we can observe the presence of a Selection Criteria in the RFP. The Columbia University RFP demonstrates this in its selection section as “the release of the RFP does not compel Columbia to purchase or to make an award.” This informs of the proceedings or technicalities surrounding selection and Columbia’s to decline people from selection. Rockville’s RFP says “Bidders must be qualified to bid in the state in accordance with Section 14-308 of the State Finance” within its Qualifications section which is essentially the Selection criteria section. The CPEX RFP also includes a Selection Criteria which has “MDC projects that incorporate urban, suburban and especially rural areas.” As we can see from the samples, the selection criteria should discuss the legal requirements in licensing which a vendor or customer must comply with. This section is mainly set as government regulations must be followed. Churkina’s guide says the purpose of

this section is to “make bidders aware of all your written bid requirements” and “make contractors aware of all the business-related criteria.” The Harvard Kennedy School of Government includes an evaluation and selection criteria in which it says must discuss the “set of evaluation criteria and proposal submission requirements.” Through these examples we can see this section is mainly helpful to bidders for informing of subtleties in participating in bidding.

## 6. Budget

Through use of samples and guides from business schools and government sources we observe that RFP are composed via use of a budget section. The budget section is where practitioners negotiate what they are willing to pay for a project or what they are willing to pay for completion of the project. According to John Zhao, this section is typically changed many times via negotiation as it involves the incentive for completing a project. Although this section involves heavy negotiation, difficulty in writing is not a main concern as is plugging in data. The Columbia RFP leaves the budget ambiguous while the CPEX lists it as “\$300,000.” Ambiguity exists sometimes because budgets may still be in negotiation. Further examples of this section are discussed in the Harvard Kennedy School of Government Guide where it is grouped with the project scope and called “Incentives.” This section is many times its own however can be grouped with the project scope as it illustrates how a project is to be completed and therefore the costs in completing via specific methods.

## 7. Obstacles and Roadblocks

Through the use of guides from business schools and government sources we observe that RFP typically include obstructions to project completion. This section is demonstrated via Forsey’s guide in which she states discussing obstructions serves to “eliminate unsatisfactory bidders, and it will also help you determine which vendors have the skills and expertise to tackle those challenges.” This section saves time in the long run for the parties involved in projects because participants which are not qualified will not waste time bidding and potentially causing a new RFP process due to a contract which can not be completed. Churkina also describes eliminating “contractors from the selection process will make life easier for both you and them.” Being crystal clear regarding difficulty will help with finding more suitable contractors from the RFP.

## Conclusion

After having demonstrated a breakdown of the RFP document students are more prepared to write a Request for Proposal, however the main importance is to demonstrate how using samples and guidebooks may assist in learning how to write a document. Although I was limited in access to RFP documents this study can function as a pilot for more RFP studies in the future. We can continue to learn about writing effective RFP documents from more examples and the next step could potentially be a study in which industry RFP are analyzed. Given more time this investigation of the RFP can be made on a larger scale by individual companies which have access to corporate RFP for analysis and many practitioners which write RFP documents.

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