




# Beyond the Boilerplate: Designing RFPs That Work for Everyone

Hosted by Partners for Public Good (PPG)  
and featuring U.S. Digital Response



In the chat, please  
share **your name**  
and **government!**

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EXCELLENCE  
NETWORK

Partners for Public Good

May 14, 2025

# Our History



Our journey began in 2011. As the procurement research initiative of the *Harvard Kennedy School's Government Performance Lab*, we set out to develop and test methods for improving government operations.

We focused on procurement—often the thorniest, most complicated part of local government. Our experts have collaborated with more than 200 local and state governments across the U.S., Canada, and Latin America to reimagine their procurement and contracting systems.

**We launched Partners for Public Good to help state and local governments harness core operational functions like procurement, staffing, technology, and budgeting to drive public impact.**

# Partners for Public Good Supports Governments Through:

✓ **Implementation:** We show up to provide governments with hands-on support to overhaul complex systems. We help execute high-impact solutions and stay until the job is done.

✓ **Policy:** We help governments design policy centered on delivering outcomes and eliminate red tape so that governments can provide more for less. We also craft model policy standards that put operational excellence into practice, setting new norms for governments throughout the country to replicate and follow.

✓ **Talent:** We enable public servants to lean into the work that matters most. We help governments devise new ways to empower their workforce, reimagine roles to achieve better results, and adapt to workplace changes, from generative AI to hybrid work.

✓ **Learning:** We provide training and executive education to unlock the potential of dedicated public servants and help them drive innovation in their roles.

✓ **Community:** We connect public servants with one another so they can innovate together and replicate what works. We also help governments strengthen their connective tissue with residents, businesses, and civil society, fostering transparency, collaboration, and trust.



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# How can you engage in this session?



Please use the  
**“Raise Hand”**  
function on Zoom!



If able, please  
**turn on your**  
**Zoom camera!**



Look out for  
**discussions and**  
**resources**  
in the Zoom chat!

# Agenda

- 1. Welcome & Context (5 minutes)**
- 2. How RFPs Fall Short—And What We Can Do About It: Featuring Waldo Jaquith, U.S. Digital Response (20 minutes)**
- 3. Real Government Examples (10 minutes)**
- 4. Interactive Template Revamp (15 minutes)**
- 5. Key Takeaways + What's Next (10 minutes)**

# Why Discuss RFP Templates, Why Now?



**RFPs are a vendor's first entry point into your government.** A clear, well-structured RFP sets the tone for a potential relationship and signals that your process is fair, transparent, and worth engaging in for vendors.



**Yet many governments use outdated RFP templates.** Long, repetitive, and inconsistent documents reflect years of layering on boilerplate content without editing or rethinking past content.



**The result? Missed opportunities.** Good vendors walk away. Competition shrinks. Staff get flooded with clarifying questions or low-quality responses.



**The good news? This is fixable.** A better RFP template isn't just more straightforward; it's more accessible, encourages competition, and increases the likelihood of finding the right vendor to deliver real results.

# How RFPs Fall Short— And What We Can Do About It

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# Key Findings from USDR's Vendor Research



Waldo Jaquith

Government Delivery Manager  
U.S. Digital Response (USDR)





**Which of the following  
"pain points" are  
showing up in your  
jurisdiction's recent  
RFPs?**

# Principles of Good RFP Design ✓

## *What makes a good RFP template?*



### **Front-Load the Essentials**

Use a summary sheet or cover page to highlight key deadlines, eligibility criteria, and proposal requirements upfront.



### **Use Plain Language**

Avoid jargon and legalese; write like you're inviting someone to partner with you, not issuing a legal document.



### **Standardize Structure**

Consistent headers, formatting, and section ordering help vendors navigate—regardless of project type.



### **Use Tools for Added Support**

Use checklists, response workbooks, and FAQ sections to guide vendors through what's required for an actual proposal.

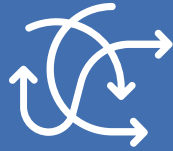
# Where RFP Templates Can Go Wrong

*Here are some common pitfalls to avoid*



## Important Information is Buried

Key deadlines, requirements, and overall RFP objectives are hard to find - often buried dozens of pages into the document.



## Templates Become Convoluted

New clauses and requirements get tacked on over time without revisiting the whole structure.



## Unwelcoming Tone

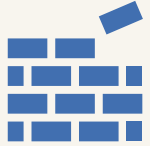
Language sounds like a warning label, not an invitation to collaborate.



## Inconsistencies Between Sections

Evaluation criteria don't match the scope. Key proposal requirements are hidden. Conflicting instructions cause confusion.

# Why Modernizing RFP Templates is Difficult



## It's a Change Management Challenge

- Improving RFP templates isn't just a formatting exercise—it requires **coordination** and **buy-in**.



## It Requires Cross-Team Coordination

- **Legal, finance, procurement, and user departments** all need a say.



## Legacy Content Makes Simplification Hard

- Older templates reflect **overlapping rules** and **risk priorities**.



## It's a Significant Project Management Lift

- Redesigning templates often takes **time, trust, and dedicated staff**.

# Real Government Examples

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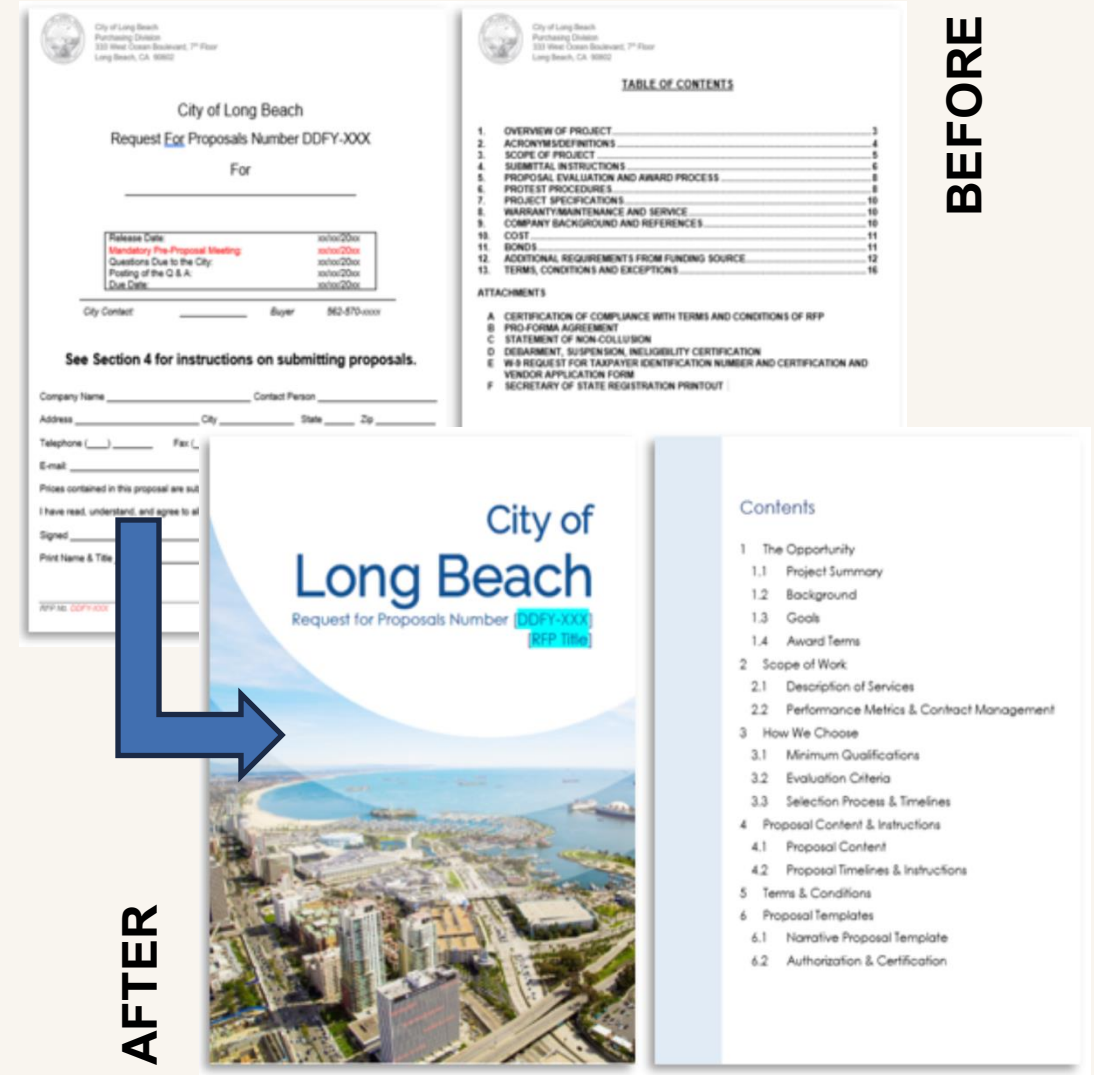
# Case Example #1: Long Beach's RFP Template Overhaul

## Case Study: Long Beach, CA

**Challenge:** Long Beach's RFP template was disorganized and redundant, frustrating buyers and vendors and leading to inconsistent use across departments.

**Innovation:** The procurement team (with PPG support) led a full redesign with buyers, legal, and leadership to create a plain language template with a new structure, visual cover page, and vendor checklist. They used Microsoft Forms to gather feedback and refine drafts.

**Key Outcomes:** The new template reduced confusion, improved consistency across RFPs, and helped staff focus on strategic sourcing. The process became more accessible, repeatable, and vendor-friendly.



# Case Example #2: Nevada's Statewide RFP Redesign

## Case Study: State of Nevada

**Challenge:** The State of Nevada's procurement templates were overly complex and inconsistent, often leading to confusion among vendors and misalignment in evaluations—especially around cost scoring.

**Innovation:** The state partnered with USDR to consolidate its RFP materials into a single access point, restructuring the **submission checklist** (for vendors) and **evaluation scorecard** (for reviewers) to match the new layout. The new approach emphasized plain language, clearer cost scoring, and more flexibility for evaluators.

**Key Outcomes:** The new approach reduced appeals and confusion, improved vendor participation, and earned praise from previously litigious vendors.

*Page 1 of 37*

**BEFORE**

STATE OF NEVADA  
DEPARTMENT OF ADMINISTRATION  
Purchasing Division  
515 East Musser Street, Suite 300 | Carson City, NV 89701  
Phone: 775-684-0170 | Fax: 775-684-0188

Request for Proposal: \*\*\*\*  
For  
**ENTER TITLE OF RFP**

Release Date: **Date**  
Deadline for Submission and Opening Date and Time: **Date @ 2:00 PM**  
Refer to **Section 7, RFP Timeline** for the complete RFP schedule

For additional information, please contact:  
**PSM Name, Title**  
State of Nevada, Purchasing Division  
515 E. Musser Street, Suite 300  
Carson City, NV 89701  
Phone: 775-684-\*\*\*\*  
Email address: **PSM email address**  
(TTY for Deaf and Hard of Hearing: 1-800-326-6868  
Ask the relay agent to dial: 1-775-684-\*\*\*\*V.)

Refer to **Section 8** for instructions on submitting proposals

Nevada State Purchasing Division  
Department of Administration  
515 E Musser St Ste 300  
Carson City, NV 89701  
[purchasing.nv.gov](http://purchasing.nv.gov)  
[nevadapro.com](http://nevadapro.com)

Request for proposals **XXXX**

ber \_\_\_\_\_  
contact name \_\_\_\_\_  
contact email \_\_\_\_\_  
Single point of contact phone \_\_\_\_\_  
Soliciting agency \_\_\_\_\_  
Contracting agency \_\_\_\_\_  
ing title \_\_\_\_\_  
for submissions \_\_\_\_\_  
For deaf and hard of hearing, call 711 and ask the relay agency to dial the single point of contact phone number above.  
This request for proposals is available at [nevadapro.com](http://nevadapro.com) as a bid solicitation.

**AFTER**

Table of Contents

1. Applicable regulations governing procurement ..... 2
2. Project overview ..... 2
3. Scope of work ..... 2
4. Attachments ..... 2
5. Timeline ..... 2
6. Evaluation ..... 2
7. Mandatory minimum requirements ..... 2
8. Critical items ..... 2
9. Submission checklist ..... 2

*Page 1 of 7*



# Case Example #3: Portland's User-Centered RFP Reform

## Case Study: Portland, OR

**Challenge:** Portland's RFP templates were long, inconsistent, and dense with legal jargon—making them hard to navigate, especially for new and small vendors.

**Innovation:** Using a user-centered approach, the city developed a unified, plain-language template with a front-page summary, vendor checklist, and separate drafting guides for staff. Clarity and usability were prioritized from the outset.

**Key Outcomes:** The new format streamlined internal processes, shortened timelines, and improved accessibility. Vendors preferred the simpler design, and buyers found it easier to complete and review.



BEFORE



### RFP at a Glance

#### Proposals Due:

April 18, 2025, by 4:00 p.m. Pacific Time

#### Summary:

The Portland Bureau of Transportation (PBOT) administers the Transportation System Development Charges (TSDC) program on all types of new construction in Portland. Developers pay fees to help cover the cost of building new transportation infrastructure like roads, sidewalks, and other parts of our transportation system. An experienced consultant is being sought to update the program for 2027 by engaging stakeholders, updating the ten-year project list, refining the assessment methodology, and creating a new rate study.

#### Pre-Proposal Meeting:

No Pre-Proposal Meeting will be held for this RFP.

#### Submit Your Proposal:

City of Portland Online Procurement Center:

<https://procure.portlandoregon.gov/bso/>

Refer to the Proposal Response Packet; Section 7: Submission Instructions for details.

#### Have Questions or Need Help? Single Point of Contact:

Send questions, requests for clarification, or requests for assistance by April 11, 2025, by 4 p.m. Pacific Time. Any questions received after may not be answered. Only the Single Point of Contact can answer questions about this RFP.

Christina Hollen-Morey, Procurement Specialist  
Procurement Services  
503-201-3823  
[Christina.Hollen-Morey@PortlandOregon.GOV](mailto:Christina.Hollen-Morey@PortlandOregon.GOV)

AFTER



# Behind the Redesign: Lessons from the Field

## Start messy, then refine



*“We didn’t need to build consensus. We just needed someone to lead.”*

Long Beach kicked off its template redesign with a rough draft and invited feedback as they went, showing progress helped bring others on board.

## Orient vendors, not just internal staff



*“We created a cover page that gave folks a better idea of what the RFP was even about and made it more accessible for vendors.”*

Portland added a plain-language cover page and checklist to improve clarity for new and small vendors, making RFPs feel less intimidating and easier to respond to.

## Streamline without sacrificing rigor



*“There were too many templates, and scoring wasn’t clear. We now give evaluators more discretion—and vendors understand it better.”*

Nevada simplified its RFP structure and clarified cost scoring to reduce confusion for both evaluators and vendors, building trust while maintaining evaluation standards.

# Interactive Template Revamp

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# Interactive Activity – RFP Template Revamp

## Reflection Time (5 minutes)

### Instructions:

You'll be reviewing the **first two pages of a fictional RFP** for an organic waste diversion program. It's not great—by design! Your task is to **diagnose what's working and what's not**.

**Step 1:** Skim the mock RFP excerpt

**Step 2:** Jot down at least **two good** and **two bad** practices

**Step 3:** Be ready to **raise your hand to share** or **drop your insights in the chat**

**Your Goal:** Spot real-world challenges and opportunities in RFP design by analyzing:

- Where essential info is surfaced (or buried)
- How accessible and welcoming the tone is
- Whether the scope invites innovation or restricts it

**After the breakouts, we'll invite 1–2 folks to share out live, and will collect additional takeaways from the chat:**

- 1) One good or bad practice you spotted*
- 2) A general takeaway about what makes an RFP more effective*

# RFP Excerpts: Spot the Good and Bad

**Village of Metroville**  
**REQUEST FOR PROPOSALS**  
**Comprehensive Organic Waste Diversion Program Services**  
**RFP #ENV-2025-103**

**INTRODUCTION AND BACKGROUND**

The Village of Metroville, hereinafter referred to as the “Village,” is issuing this Request for Proposals (RFP) to qualified Offerors for the purpose of soliciting proposals for the administration of a comprehensive waste diversion program. The program will promote sustainable waste diversion strategies through the distribution, coordination, and monitoring of municipally owned organic composting receptacles to eligible households and entities located within the incorporated boundaries of the jurisdiction of Metroville, pursuant to local ordinance No. 23-2447 and any applicable successor regulations.

Offerors shall comply with all relevant federal, state, and local laws and ordinances governing the administration of organic waste programming, including but not limited to the Organic Waste Recovery Act of 2021, Section 3b of the City’s Refuse Collection Code, and Article IV of the Metroville Health and Sanitation Manual, as well as any codes or supplemental directives established or enacted after the publication of this RFP and prior to contract award.

**Issue Date:** May 14, 2025  
**Due Date:** Responses must be submitted no later than “30 days from posting.”  
**Questions must be submitted no later than the 3rd Tuesday in April.**  
Respondents are hereby advised to contact Environmental Services via fax, letter, or in-person visit at 112 Civic Center Drive, Room 3B.

**RFP Contact:**  
*Terry Fictionalman, Waste Diversion Program Manager*  
Email: tfictionalman@metroville.gov  
Phone: (555) 800-1432

**SCOPE OF WORK**

The purpose of this contract is to enhance the Village of Metroville’s capacity to reduce residential and small commercial food waste by means of a coordinated waste diversion program and contractor-supported outreach and logistics.

**Key Responsibilities Include:**

- Develop an implementation methodology that accounts for variable household access needs.
- Coordinate distribution of 4,200 residential compost bins and 300 commercial units across all five districts.
- Maintain thorough records of distribution (including bin serial #s).
- Incorporate accessible instruction materials for non-English speakers and elderly residents.
- Ensure successful Offerors are not already disqualified by Section 48 of the Village’s Environmental Sanctions Schedule (Metroville Council, 2017).

The Offeror is expected to execute all related tasks outlined in Appendix IV-C of the Village’s Municipal Composting Charter.

Offeror shall submit detailed reporting metrics and utilize the village’s proprietary WasteNet submission portal within 10 business days of each distribution effort. Required fields must include: site ID code, address, delivery timestamp, bin model, and outreach record. Reports must be verified with both digital and physical signatures.

**Expected Project Timeline: Early Q3**

**Important Reminders**

- The expected service delivery model must incorporate a vertically integrated logistics plan.
- Respondents must demonstrate “maximum proficiency” in the areas of transportation ecology, stakeholder harmonization, and bin lifecycle administration.

**Optional Pre-Proposal Webinar:**  
Monday, May 13, 2025 at 10:00am CST via MS Teams  
[Registration link will be emailed by city staff.]



# Report Back



***Let's hear from a few people!***



**Here are a few questions to guide your share-out:**

1. What did you **like/not like** about this RFP? What's **one specific edit** you would make to improve the RFP?
2. What **principle or takeaway** guided your change in how to make the RFP more effective?

***Feel free to focus on one part of the RFP—every edit helps!***

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**Expected Project Timeline: Early Q3**

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**Keep Going — More Issues Ahead!**  
Two pages in, you’ll still find:

- ✗ No **Table of Contents** to guide navigation
- ✗ Missing **Evaluation Criteria & Award Info**: vendors are left guessing what matters

**Expected Project Timeline:** Early Q3

**Important Reminders**

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# Debrief and Close-Out



***Let's hear from a few more people!***



**Here are a few questions to guide your share-out:**

1. Did anything **surprise** your group during the exercise?
2. How might this activity **shape the way you write or review RFPs** in the future?

***Every RFP tells a story—make yours easier to follow.***

***Start with one edit that brings clarity, and build from there.***

# Key Takeaways + What's Next

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# Crafting Smarter RFP Templates

## ✓ DO:

- **Front-load key info:** Make deadlines, eligibility criteria, and submission steps easy to find.
- **Use plain language:** Replace jargon with clear, conversational content and instructions.
- **Standardize structure:** Create consistent headers, section order, and formatting across RFPs.
- **Support vendors:** Include a checklist and/or response workbook to reduce confusion.
- **Iterate and test:** Use feedback loops and pilot drafts with internal teams and vendors.



**Remember! Even small improvements can have a big impact.**  
Start with one change—like adding a summary page or checklist—  
and build from there.

## ✗ DON'T:

- **Bury critical info:** Don't hide key deadlines or requirements on page 12.
- **Over-prescribe proposal responses:** Avoid dictating methods—focus on outcomes.
- **Copy-paste blindly:** Legacy clauses may conflict or no longer serve your goals.
- **Misalign across platforms:** Don't let your PDF and eProcurement system conflict—make sure key info is consistent in both.
- **Delay action waiting for perfect:** You can start small—refine as you go.

# If You're Redesigning Tomorrow...

## ***Start small. Focus on quick wins that build momentum:***



**Clarify your purpose and scope:** Decide whether you're improving one RFP or updating the full template—and what's in or out of bounds.



**Build the right team early:** Include legal, procurement, and user department voices to ensure changes are practical and adopted.



**Appoint a lead to guide the process:** Designate someone to own the redesign and keep things moving across review rounds.



**Socialize changes with stakeholders:** Pilot drafts and gather feedback from both internal teams and vendors to reduce resistance.




**Track impact to sustain momentum:** Capture quick wins—like fewer clarifying questions or faster reviews—and share results.



# Looking for Inspiration?


## Check out examples from our resource library!



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### Guidebook: Crafting a Results-Driven Request for Proposals (RFP)

*Authors: Kailey Burger Ayogu and Elena Hoffnagle*



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Partners for Public Good  
→ [TEMPLATE](#)



### Request for Proposals (RFP) Template


*Authors: Elena Hoffnagle and Kate Mertz*  
*Contributors: Colin Erhardt, Rebecca Graffy, Laura Merryfield, and Hope Patterson*

This results-driven **Request for Proposal (RFP)** template will help state and local governments craft an inviting RFP that attracts quality proposals from vendors focused on improving outcomes for residents.

This template contains all major sections of a results-driven RFP. In each section, supplement and customize our starting language with text specific to your government.

In addition to this overview, our toolkit contains a fillable RFP template and a fillable RFP Response **workbook and question bank** in .docx format.

Request for Proposals (RFP) Template | Quick Read | 1



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### CATEGORY 1: QUALIFICATIONS, EXPERIENCE, AND CAPACITY

**(EXAMPLE CATEGORY ONLY)**

List out the questions you want your proposer to respond to in the space below. Questions below are examples only. You should pare down the list of actual questions you include in your RFP.

1. **Qualifications and Experience**

a. **Overall qualifications:** Provide a general overview of your organization. What sets your organization apart from your competitors? Why is your organization uniquely qualified to take on this scope of work?

(Proposer to include response here)

b. **Experience:** Describe the extent of your organization's experience in conducting similar projects or delivering similar services for public agencies. What has that experience taught you that you would bring to this project?

(Proposer to include response here)

c. **References:** Provide contact information and a short description of prior work for **X** references who can speak to your experience on similar projects.

Reference 1	Company	
	Project Manager	
	Phone Number	
	Project Description	
	Project Start and End Dates	
Reference 2	Company	
	Project Manager	
	Phone Number	
	Project Description	
	Project Start and End Dates	
Reference 3	Company	
	Project Manager	
	Phone Number	
	Project Description	
	Project Start and End Dates	

2. **Staffing, Capacity, and Oversight**

a. **Team overview:** Describe the team that would work on this project. Include a list of key team members and their general availability while on this project. Make the case for why they would be great partners on this project. Provide bios, resumes, or whatever you think best highlights the strength of this team.

(Proposer to include response here)

4



**And don't forget to join PEN if you haven't already!**



**ZOOM POLL**

**We want to hear from you!**

**Please share feedback  
about today's session!**

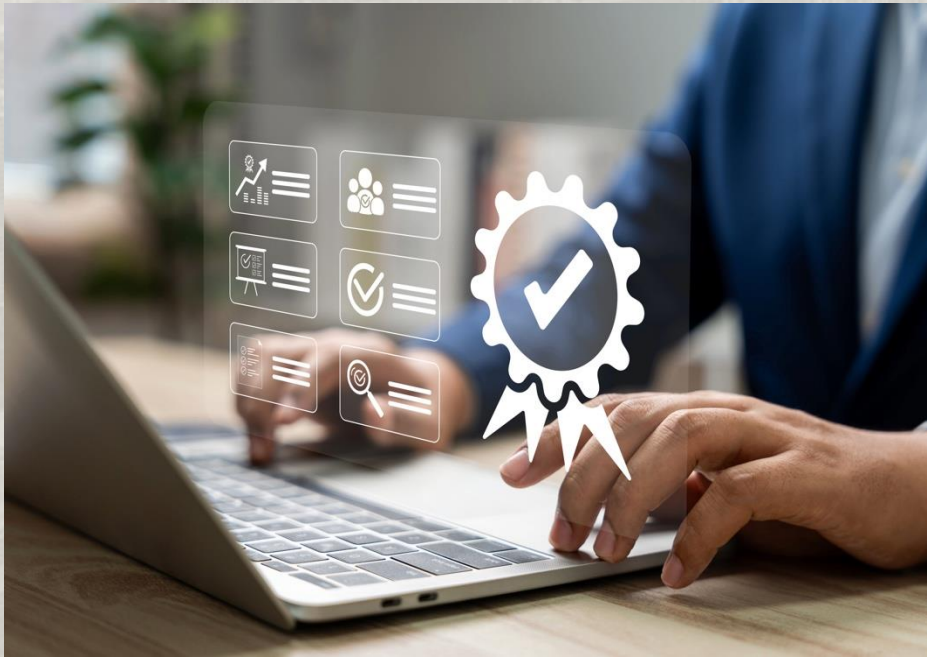
**FEEDBACK IS ANONYMOUS!**



# Join us for our next PEN event!

**Register Now!**

## Transparency in Action: Implementing Vendor Performance Evaluations



*Is your government exploring ways to measure vendor performance across all contracted services?*

Join the Procurement Excellence Network for a discussion on implementing effective vendor performance evaluation systems—*often referred to as "vendor scorecards"*—to incentivize high-quality service delivery and inform future contracting decisions.

**June 25, 2025 2:30-3:30 pm ET**



# Thank You & Stay In Touch

**We're so glad you joined us for *Beyond the Boilerplate*!**



**We'd love your feedback** – please fill out the satisfaction survey (link now in the chat!).



**Want input on your RFP?** Schedule a coaching call! We're happy to provide informal feedback or share lessons learned from other projects.



**Stick around!** We'll keep the Zoom room open for **15 minutes** of optional networking and **Q&A**.



# Optional Networking & Q&A

PROCUREMENT  
EXCELLENCE  
NETWORK

Partners for Public Good