



PROCUREMENT EXCELLENCE NETWORK

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Solicitation Getting Started Toolkit

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This document is part of the Solicitation Getting Started Toolkit. Other documents in this toolkit include:

1. A procurement intake form,
2. A guide to kickoff meetings with departments, and
3. A getting started worksheet for RFP planning.

This toolkit pairs well with our **Guidebook: Crafting a Results-Driven Request for Proposals (RFP)**, which provides additional instructions about designing and drafting a results-driven RFP.

Together, these three tools will enable your government to shift from reactive to proactive planning, save time, and identify the best procurement strategy for your project.

Overview

It's almost winter and your Streets Department is procuring new snowplows to replace old equipment. To your dismay, none of the bids submitted meet the restrictive specifications outlined in your city's bid documents. Worse still, it's too late to reissue the Invitation for Bids before snow season.

Your Library Department is months into independently preparing a solicitation for a new IT system related to HR management. A similar system is already in place in other departments; all the library needed to do is buy a few more licenses on the existing contract. As a result, the staff have wasted a lot of time and effort starting from scratch.

Sound familiar? Unfortunately, headaches, frustrations, and unnecessary emergencies like these are a regular occurrence for procurement staff in many state and local governments. A purchasing office can be a valuable partner in collaborating with departments or agencies to avoid these issues—but this relationship is only effective when a procurement team can provide strategic input early in the process.

Proactive engagement with customer departments or agencies early on offers many benefits. An organized intake process helps staff in the purchasing office understand the needs, risks, budget, and timeline of department or agency staff who need to procure. A purchasing office can then make sure department or agency staff know the correct solicitation type to use, the proper steps to follow, and the amount of time needed for each step. Such guidance may save departments from going too far down the wrong path or prevent delays in releasing a new RFP or bid.

This early engagement also allows procurement staff to offer their expertise and strategic thinking during the planning process—by offering guidance based on past similar purchases and by orienting departments towards writing results-driven RFPs instead of overly prescriptive RFPs that unnecessarily limit competition and innovation. Additionally, procurement staff can share relevant knowledge with other stakeholders (e.g., IT, legal, or other departments that purchase the same service) at the right stage of the process to facilitate input. These strategies can foster more collaborative relationships between key players across a government.

In this toolkit, we share all the resources you need to implement earlier planning for procurement in your government:

1. A procurement intake form,
2. A guide to kickoff meetings with departments, and
3. A getting started worksheet for RFP planning.

Tool #1: Procurement Intake Form

PURPOSE, SPECIFICATIONS, & OUTCOMES	
Topic	Department Response
<p>Purpose: In a few sentences, what does the product or service need to accomplish? What current or anticipated problem does it intend to address?</p>	<p>EXAMPLE: We need a janitorial service to clean the restrooms and restock the supplies at 3 city parks (South Park, West Park, and North Park) daily. This service needs to result in thoroughly cleaned restrooms each day. Without properly cleaned restrooms, residents' health could be put at risk, or we could face frustration from families using parks and expecting to find a clean restroom.</p>
<p>Specifications and Scope of Work: Describe the necessary characteristics (technical or qualitative) of this product or service for it to fulfill its purpose. You can list categories here - the assigned buyer will work with you to clarify exact numbers and measurements. Feel free to include attachments with additional information.</p>	<p>If a PRODUCT, please define all specifications the product must meet. Include any services that the firm must provide to fulfill your needs (e.g., delivery, installation, removal).</p>

How does your purchasing office find out that their input or approval is needed on a solicitation? Do department or agency staff send an email with haphazard information about a request that leaves your purchasing team with too many questions to move forward? If so, you're in good company! Standardizing intake with an organized method for collecting "first contact" information on new procurements can help save everyone time. Having department or agency staff fill out a simple procurement intake form can support you in receiving the information you need to provide the right support.

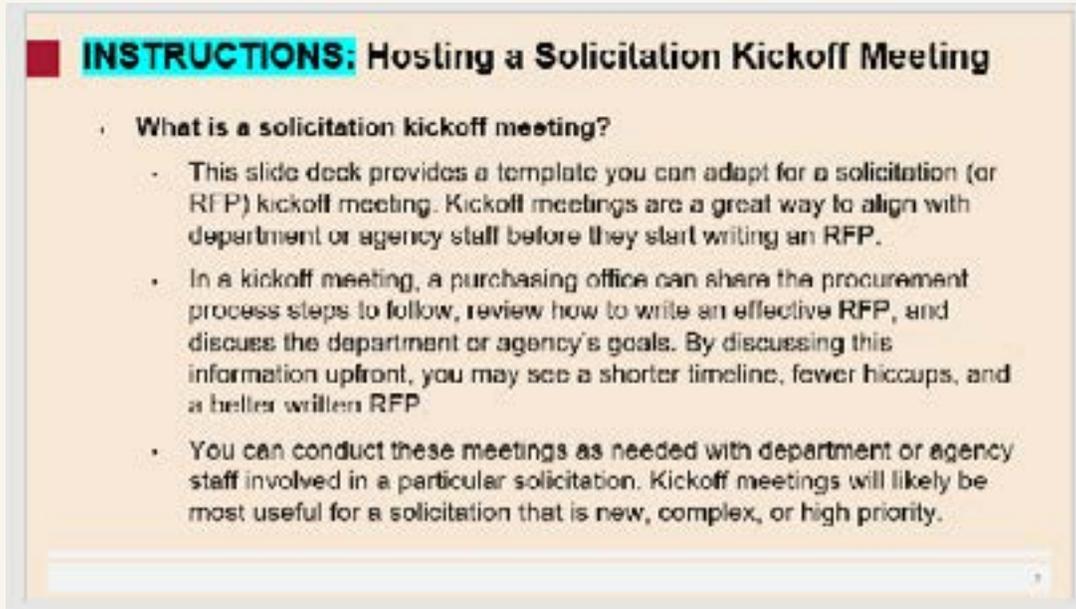
When an intake form might be used will vary from government to government, but the information should generally be collected after the department or agency has a general sense of the scope or parameters of what they need, but before they have fully drafted a solicitation (for a typical government this could be 3 to 9 months before the procured good or service is needed). However, these aren't fixed rules. For example, some governments request an intake form accompany a draft of specifications or a Scope of Work.

Now, you may be thinking—nobody wants another form to fill out! And you're right: an intake form shouldn't be a burdensome bureaucratic requirement. It should feel like a small change that can be easily integrated into existing processes and systems to collect information that would be shared regardless, except via an ad hoc or incomplete approach. The form should cut down on disorganized back and forth information collection over email or multiple calls, rather than feel like a burden.

This template, based on our work with state and local governments, provides an example of how your government could structure a procurement intake form. Although the linked example is a document that staff download and fill out, a Google or Microsoft survey form or an application integrated into your government's e-procurement or ERP system could also be used.

When looking to adapt this to your government's specific context, consider if there are any additional pieces of information that would be helpful for your purchasing office to know early in the process. Take care to only ask for information that is truly useful in your context and remove any fields you don't need.

Tool #2: Guide to Kickoff Meetings with Departments



Virtual or in-person solicitation kickoff meetings can be helpful for orienting department or agency staff to the procurement process and the steps to follow, educating them on how to write an effective RFP, and discussing the goals and risks of a specific solicitation. You can conduct these meetings as needed with staff involved in a particular procurement (e.g., after an intake form is submitted for a solicitation that is very complicated, or when inexperienced staff begin writing a new RFP) or, alternatively, you can meet with large groups of customer department or agency staff at regular intervals (e.g., annually or several months before a large share of a department’s contracts generally expire).

This slide deck provides a template for the kickoff meeting and includes sample language to get you started. As with the other tools, be sure to customize these slides for the specific goals and set up of your department kickoff meetings.

Tool #3: RFP Getting Started Worksheet

	Answer:	Open questions / additional information to gather:
<p>1 PROBLEM</p> <p>What is the problem this procurement is intended to help address? How have you tried to solve this problem in the past?</p>		
<p>2 GOALS</p> <p>What outcome goal(s) is the department trying to make progress on? What is the gap between where you are today and where you want to be?</p>		

Our third and final tool is a worksheet that guides department or agency staff in thinking through important questions to shape the development of a new RFP and write results-driven RFPs. The goal here is to support staff in thinking about what they most want to achieve with an RFP – the end outcome to be achieved from the contract – before they start writing. It also provides an approachable starting point for staff as they write a new RFP so that they don't default to recycling old content without thinking through whether anything should be changed.

Answering the questions in the Getting Started Worksheet may not be necessary for every new RFP. Instead, departments or agencies may choose to prioritize using this tool when procuring services that:

- Are complex or new to the government,
- Are resident facing, highly visible, or key to government priorities,
- Have a high value,
- Previously experienced vendor performance issues,
- Received few bids in previous solicitation efforts, or
- Need input from staff across multiple departments or agencies.

Your purchasing department can help staff determine which procurements should kick off with a deliberate planning process like the RFP Getting Started Worksheet.

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The [Procurement Excellence Network](#) (PEN) is a free, online community for public sector leaders seeking to transform their jurisdiction's procurement practices. It offers virtual trainings, tools, templates, and coaching, while building peer connections for leaders as they launch efforts to make procurement more strategic, fair, and innovative. PEN is an initiative of [Partners for Public Good](#) (PPG), a 501(c)(3) non-profit organization that helps state and local governments use key operational levers—procurement, workforce, digital infrastructure, and budgeting—to drive public impact.

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