



## Introduction

Writing an RFP can seem like a daunting task. The RFP is a tool to communicate to a consultant what you need and how quickly you need it.

A well prepared RFP should clearly layout the specifics of the project, timelines and responsibilities. This is information the consultant requires to provide an accurate quote for their services. If the RFP is clear the proposals will include all the information required to decide if the consultant can meet your needs at a cost you can afford.

In order to ensure that both the consultant's time and your time are best spent, the RFP should include the following information:

### 1. Information About Your Community

To help a consultant decide if their services fit your needs, begin your RFP with information about your community, including but not limited to:

- a brief description of your community (location, population, significant industry, development, settlement);
- identification of existing planning tools including Official Community Plans, zoning bylaws, and Regional Growth Strategies; and
- your mission, vision, goals, and relevant growth plans.

### 2. Scope of Project

Your description of the project will provide the consultant with context and identify your expectations. The better the consultant understands your

requirements, the better the proposal will be. You should clearly explain:

- why you are seeking proposals;
- the goal of the project;
- issue(s) the project is intended to address/resolve;
- issue(s) which may complicate the project;
- history relating to or affecting the project;
- other related projects; and
- the interim and final products you require (if the product/ project is similar to something existing, consider providing this information as an attachment).

### 3. Timelines

Indicate the overall timeline for completing the project and set milestones or deadlines. These factors may affect what a consultant proposes and the cost. If time is very important, consider including a project schedule in your RFP or you can specifically request a workplan identifying key actions, staffing, resources, costs and timelines.

### 4. Responsibilities

To help the consultant understand the range of services required, clearly identify your expectations for administrating and managing the project and ask them to identify what they will be responsible for in the proposal. For example:

- administration e.g. meetings, minutes, invoicing, etc; and
- organizing public consultations, preparing/printing materials, presentations, final reports, etc.

## 5. Budget

To help consultants decide if they wish to develop a proposal and to determine if the proposal meets the limitations of your budget:

- clearly identify your budget for the project as appropriate; and
- request consultants respond with detailed estimates for each product or phase of the project and ask them to identify what they have allowed as a contingency factor.

## 6. Information About a Consultant

The RFP should ask for detailed information on the consultant's expertise and experience. Request a resume of the principal consultant, summaries or examples of similar work performed for other municipalities, or references from similar clients. Ask the consultant to identify any sub-contractors, what they will be responsible for and verify their expertise.

To help you compare consultants, it may be useful to prepare a questionnaire focusing on experience and expertise of particular interest to your group.

## 7. Submission Requirements

To ensure that you get the proposals complete, in an acceptable format, and on time, the RFP must provide:

- contact information;
- closing date/time;
- number of copies required;
- any templates or forms you have developed; and
- acceptable formats (digital, hard copy).

The RFP should also let consultants know:

- when you will be reviewing proposals;
- whether or not you plan to conduct interviews and reference checks; and
- when you will be making a decision.

For detailed or large projects like an official community plan, some municipalities will prepare a separate Terms of Reference (TOR). Where applicable these should be referenced in the RFP and attached.

## 8. Criteria for Proposal Evaluation

Consultants need to know how you will evaluate proposals. Clearly outline the criteria. This may be as simple as the total estimated cost or may include several factors like:

- related experience;
- proposed approach;
- submitted workplan; and
- costs and outputs.

## 9. Terms and Conditions

A section should be included at the end outlining any terms and conditions applying to the proposal or the overall product/project. For example:

The municipality will:

- not pay for bids;
- retain the right not to select any consultants;
- require a contract before a certain date.

For clarity, you may also want to include any definitions or terms possibly unfamiliar to the consultants.

## **Conclusion**

Crafting a good RFP requires some time and effort. A good RFP will help the consultants to prepare proposals in response to your needs, will streamline the evaluation process, and contribute to the preparation of the TOR and the contract.

## **Contact Information**

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For more information contact the  
Community Planning Branch of  
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Affairs.

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