

Proposal Length: No Limits!

The government procurement officer asked about limits on proposal length.

“I get these gigantic proposals in response to my RFPs,” she said with despair. “Hundreds of pages long... meaningless marketing mumbo-jumbo that might or might not be tangentially relevant to the evaluation criteria. I’m never really sure. And they take hours to wade through! So, what would be a good way to limit proposal size? By number of pages? Number of words? And if so, how many?”

My thoughts drifted back to a dimly remembered English exam for engineers. “Compare and contrast the themes of good and evil in Beowulf. 100 points.” Because I had no idea what the prof was looking for, I threw everything I knew about Beowulf onto the page. Was it relevant? I didn’t care. I just hoped something would stick and the prof would recognize a few clever insights that were worth points.

It occurred to me that RFPs attracting the thick but light-weight proposals might be full of open-ended criteria just like the open-ended Beowulf question. The poor respondents had no idea what the procurement officer was looking for so they threw everything they had onto the page hoping that something would stick and earn them points.

I have written RFPs and proposals, and helped many others write theirs. Most worked well. But some did not.

Consider the familiar example of evaluating a respondent’s level of experience to exploit the theory that if they have done the job frequently before, they should be able to do it again and do it well. Here is one possible criterion statement.

3.12 Owner is looking for a contractor with plenty of relevant experience. Please describe the breadth and depth of your experience as it relates to this project. 100 points.

Sorry, but for me as the respondent preparing a proposal, this is a Beowulf open-ended question. The project statement of work will give me some idea of what is relevant. But how do I match that with the breadth and depth of my experience? How broad? How deep? Maybe I could describe one of my past projects in rich detail. Or maybe I could provide 20 of them in outline form. No, better give them all (and why stop at 20?) in exhaustive depth complete with diagrams. But that’s a lot of work. What is Owner really looking for and how much is “plenty” anyway? Oh well, I hope they find something clever in these 100 pages. OK, next?

Consider this alternative criterion statement for achieving the same end of evaluating the respondent’s suitability based on experience. Call this the non-Beowulf approach.

3.12 Owner is looking for a contractor with plenty of relevant experience. In this context, “relevant experience” is experience that includes ALL of the following:

- 3.12.1 *work performed under a contractual relationship lasting more than three months*
- 3.12.2 *work performed for an organization with a yearly revenue of at least \$10M*
- 3.12.3 *work that was similar in scope to the work required in this project*
- 3.12.4 *work that was completed in the last five years*

- 3.13 *Owner expects the proposal to contain a point-form list of “relevant experience” instances containing the following for each instance:*
 - 3.13.1 *contract start and end dates*
 - 3.13.2 *name of contracting organization and a contact person at that organization who can confirm details of the respondent’s work there*
 - 3.13.3 *scope of work performed by the respondent for the contracting organization under the contract*
 - 3.13.4 *clear description showing the linkage of relevance between the scope of work performed under the contract and the services required by this RFP*

- 3.14 *Owner will award points as follows:*
 - 3.14.1 *Unsatisfactory, 0 points. Respondent has no relevant experience instances.*
 - 3.14.2 *Acceptable, 60 points. Respondent has 1 or 2 relevant experience instances.*
 - 3.14.3 *Good, 80 points. Respondent has 3 or 4 relevant experience instances.*
 - 3.14.4 *Excellent, 100 points. Respondent has 5 or more relevant experience instances.*

This makes proposal preparation easy for the respondent. They know they need at most five project examples. They have a short checklist of attributes for selecting qualifying projects. And they have another short checklist of specific things that have to go into the proposal for each project. All this removes the temptation to include uncertainty-driven marketing fluff or extra packing material.

Furthermore, the respondent can score themselves to know if they will fare well on this criterion. If all the criteria are equally objective and the respondent’s self-scoring exercise gives poor results overall, they may decide to drop the proposal and move on to something more promising. This avoids wasting Owner’s time with weak or unsatisfactory proposals.

This approach also makes evaluation easy for Owner. They use exactly the same RFP info, and only that info, to ensure that all the projects in any proposal are in fact “relevant experience.” They can ignore any material that does not contribute to this determination. If they have any doubt, they can always check with the contacts given. Then they just count up relevant projects and give one of four scores.

Objective criteria like this second, non-Beowulf approach also make post-award documentation and debriefs painless for everyone. Explaining that “You clearly showed two relevant experience instances and thus received 60 points” is a lot easier for both parties than “I know you described 20 projects but only one of them covered x, and that is what we considered most important. The diagrams were very

distracting. But we gave you the benefit of the doubt with 60 points,” which is what might have resulted from the Beowulf open-ended question approach.

Notes on the second approach:

- Contacts at the contracting organization are not references. Owner only contacts them to confirm specific information provided by the respondent, and then only if there is some doubt if the work actually constitutes “relevant experience” as defined.
- Owner never awards intermediate scores, e.g., never 70 points for Acceptable-and-a-half. In this example, there are only four levels and only four possible scores.
- There is no subjective or secret marking guide. Owner uses only the information in the RFP to do the evaluation. That is fair and transparent... and a requirement of most modern trade agreements.
- Proactively disclosing a respondent’s own scores and justification after the evaluation is uncontroversial and easy because the criteria are objective. The scores constitute confirmation, not surprise. This usually removes any desire for a debrief because it would add no new information.

I have directed and responded to many RFPs, some of them Beowulf open-ended, most of them non-Beowulf objective. Yes, the latter requires more work up front. But that upstream investment has a big payoff downstream because it makes things much easier for both respondents and Owner in many ways. And, as I assured the procurement officer, it eliminates bloated proposals. So, if she does things wisely, she will not have to worry about limiting proposal length at all.

Or, if you look at it from the respondent’s point of view, a limit on proposal length is an admission that the criteria are not objective. Trade agreement compliance aside, that is a red flag to a busy respondent who might just decide to take no chances and move on to a better client.

So, why would you want to do it any other way?

Proposal length? The sky is the limit! But if you design your RFP well, the proposals will be down to earth.

Contact TimmiT to help banish Beowulf from your RFPs.