We Have Your Number

Every separate block of text in your RFP must have a number. This makes updating specific RFP clauses or paragraphs via addendum easy and unambiguous. It also makes contract negotiations much smoother as the parties work together to relate specific parts of the RFP to the eventual contract. Furthermore, consistent numbering helps prospective proponents navigate the RFP easily and makes you look smart. Referring directly to "clause 32" is much easier than trying to zero in on "the third bullet in the second list on the page that is three pages before the big table in the middle."

But doesn't your RFP template built with Microsoft Word already do that automatically?

Sure, the temptation is to toss the problem over to Word and stand back. That works to a point, better for experienced experts than for others. But when it doesn't work well, it makes you look sloppy. One should always be aware of the limitations of one's own experience and tools. For example, you need to use at least minimal Word "styles" to produce an automatic table of contents. If that means nothing to you and your RFP is more than a few pages, find someone who knows how to do this.

Let's look at your RFP structure and examine the best way to number the various parts.

Pages. This is probably the easiest type of numbering. Word can usually be coerced into putting an automatic running page number sequence in a footer. Word can easily and automatically handle indicating the total number of pages in the document too, so your document might show something like "page 3/22" on every page, which is a good idea. Things work less smoothly, however, if someone else has been into the document ahead of you (maybe if you are using a template designed by someone with a different but not necessarily higher level of expertise) and introduced section breaks to give different footers to different parts (major sections; see next para below) of a single document. Unless this is done well and consistently, page numbers tend to disappear or reflect something other than reality. If you can't be the expert and make all this work, then keep things simple with one running page sequence and the same footer for all pages in the document.

Major sections. Your RFP may have five or six major sections, e.g., instructions, process, terms, scope of work, evaluation, etc. These should be clearly named and numbered at the beginning. There is no real advantage, and several disadvantages, to having Word try to insert these numbers automatically. Your major section structure is well defined and fixed so spontaneous addition or deletion of major sections is very rare. So, number each major section manually: just type in the number.

Minor sections. These form the structure of each major section. For example, your scope of work (major section) might have minor sections like background, system description, services, deliverables, and disclosures. Each of these minor sections will have a title heading set off by spacing and fonts from the rest of the running text. Resist the temptation to number these headings. They carry no information themselves and are only there to make the document easier to read. But make sure you style these headings appropriately so they show up automatically in the table of contents.

RFP text. You might still be scratching your head over the recommendation not to number minor section headings because you expected to number each paragraph with some sort of subordinate numbering scheme related to minor section numbers. You can do that if you *really* want, but it gives no particular advantage and comes at the cost of wrestling Word into applying common consistent numbering to both headings and text. Instead, select some simpler numbering scheme and apply it to every para, sub-para, sub-sub-para, etc. This means:

- Don't try to link paragraph number to minor or major section numbers. For example, if your major section has 30 paragraphs, simply number them 1–30.
- Never use unnumbered bullets. Apply your numbering scheme instead.
- Never use unnumbered blocks of text. Apply your numbering scheme instead.

There are two general numbering schemes for text. The first uses a mixture of letters and numbers and might look like this.

```
1. first paragraph
  a. first subpara
  b. second subpara
     (1) first sub-subpara
        (a) first sub-sub-subpara
        (b) second sub-subpara
     (2) second sub-subpara
  c. third subpara
2. second paragraph
3. third paragraph
```

This scheme gets confusing for lists longer than a–z and for deep lists where it usually devolves into Roman numerals with highly variable lengths. Its major disadvantage is that determining the reference to any block of text requires correctly interpreting the structure and then assembling the reference from the numbers on the preceding elements. This is especially awkward and error prone when some of the preceding structure elements are on a previous page (maybe several pages back) or off the screen.

The other numbering scheme uses numbers only and might look like this.

```
1.    first paragraph
   1.1.   first subpara
   1.2.   second subpara
      1.2.1.   first sub-subpara
         1.2.1.1.   first sub-subpara
         1.2.1.2.   second sub-subpara
      1.2.2.   second sub-subpara
   1.3.   third subpara
2.    second paragraph
3.    third paragraph
```

The usual objection to this scheme is that numbers take up too much space, especially for very deep structures. There are two solutions to that. First, simply make the numbers smaller than the surrounding text, e.g., 8 points instead of 11 or 12. Second, review the structure of your document and simplify it. Already at four levels deep as shown above, the document will be difficult to understand. Don't compound that. The significant advantage to this scheme is that every block of text has its own complete unambiguous reference already attached: no error-prone assembly or scrolling back required.

In theory, Word can handle both numbering schemes automatically if you know how to tell it to do so. However, Word often exercises its own initiative and tries to help in mysterious ways that work against what you are trying to do. Try creating a separate style for each level of paragraph and applying those styles consistently if you run into problems.

Once you have your RFP complete and numbered, check it again to make sure everything actually is numbered consistently. Word's enthusiasm to help and the normal editing process of adding and deleting text often mean that some text emerges unnumbered or out of sequence.

Couldn't we just avoid all these problems with a well-designed Word template created by an expert? In theory, yes. But that requires that the person using the template first understand how the template was designed and then use those design concepts consistently in entering content. Most people don't actually write their RFPs into templates. They try to paste in parts from documents created elsewhere with different formatting.

All the Word styles and formatting issues aside, the keys to getting this right are:

- knowing what you're trying to accomplish with numbering: what to number and how. That's the focus of this article.
- wrestling with Word to make it happen. That requires expertise and experience, not necessarily your own.

Remember: you *must* do this well. A poorly integrated RFP with inconsistent numbering indicates a disorganized and inattentive author. In the absence of any other information, this may convince potential proponents to skip that RFP and move on to others from better clients.

Bottom line: If you want to be number one, you have to bat a thousand. And that's not quite as easy as one, two, three.

Contact TimmiT if you want your RFPs to be number one.

See the example on the next page of simple numbering in a major section of an RFP.

SECTION 5: SIMPLE MAJOR SECTION NUMBERING

Introduction minor section

1. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam consequat lectus risus, nec fringilla tellus consequat non. Pellentesque odio odio, vestibulum ac nunc a, vehicula tempus dui. Duis gravida fermentum laoreet.

Objectives minor section

2. Fusce facilisis lectus elit, quis condimentum massa vehicula sit amet. Quisque ac dolor et neque laoreet ultricies quis eget ante. Duis facilisis tellus ornare varius gravida.

3. Donec interdum elit in elit pulvinar, eget accumsan purus auctor. Aenean ullamcorper erat risus, quis dapibus nibh iaculis in.

Deliverables minor section

4. phasellus mauris nunc

5. efficitur in purus sed

    5.1. hendrerit molestie odio

    5.2. venenatis mauris

        5.2.1. hendrerit orci

        5.2.2. ullamcorper

        5.2.3. vel sagittis augue

6. pellentesque sed odio vitae

Disclosures minor section

7. Nunc sagittis dolor at magna placerat, eget bibendum sem egestas. Curabitur pulvinar nulla quis eros bibendum, at convallis lectus commodo.

8. Praesent aliquet, neque condimentum pharetra ultricies, nibh sem consectetur velit, a gravida lorem sem in nunc. In commodo consequat lacus ac pharetra. Praesent posuere vitae tellus a convallis. Proin ultrices odio in velit luctus, at scelerisque neque lobortis.