

TIPS + TRICKS FOR STRONGER PROPOSALS

Hello USAID Finance and Investment Network members! INVEST was designed to connect USAID with the technical experience it needs, on-demand. We are working to break down barriers between USAID and the right firms for the job.

Many firms in the network are new to working with – and writing proposals for – USAID projects. Based on the proposals we’ve received, we put together some additional tips to help make your proposals stronger. Our goal is to improve future INVEST proposals, especially for firms that are new to the space, by being transparent about what we are looking for. Check out our tips below!

TREAT EACH PROPOSAL AS A SEPARATE EFFORT

We write each RFP and SOO deliberately with details and objectives meant to guide you in your response. Please read each SOO carefully to understand the objectives of the activity and the components we are looking for. Use the evaluation criteria in the RFP to structure and organize your proposal, ensuring that you address each element of the evaluation criteria. This helps the evaluators understand your approach and ensure that you have responded to each of the requirements. You will also notice that the number of points assigned to each section changes between RFPs – this reflects what is most important to the evaluators when they review proposals.

STREAMLINE

You have limited space to describe your technical approach, institutional capacity, and staffing plan. That means it’s crucial to trim unnecessary language and avoid repeating language from the RFP/SOO. That will free up space to lay out your unique perspective on the context of the work, offer up a hypothesis based on your experience, and describe your technical approach.

DON'T JUST TELL US, SHOW US

Demonstrating your institutional capacity is crucial since we need to see that you've worked in a particular sector or geography or technical area before. But don't stop there. In your technical approach, be specific about how you will reach the objectives outlined in the SOO. Whether or not you have done a similar project before, we need you to articulate how you will approach the SOO this time, for example, providing a clear management plan, information on data collection and metrics, and details on how you will reach the technical targets. Reviewers need this concrete information to evaluate proposals fairly. Get creative with how you showcase your overall approach, innovative ideas, and new perspectives on how to achieve the objectives in a more effective way.

PARTNER WISELY

Partnering can help, but only if it really makes sense. INVEST RFPs often identify specific requirements like niche technical expertise or deep relationships in a given country. In some cases, your firm may have a lot to offer, but you may lack specific technical or geographic expertise. At times like this, partnering can be a good option. Once partners submit a proposal together, we cannot decouple them. Each partner must provide a strong technical value-add and the firms must truly complement each other. Be explicit in your proposal's staffing and management plan section about the role each firm will play and how you will work together efficiently.

CONSIDER GRAPHICS

We don't want you to spend a lot of time writing up novel-length proposals. That's why we put out short RFPs and typically ask for 5-10 slides in response. But we know it can be challenging to convey layered or complex information concisely. If you are struggling with a particular section, consider using a graphic to get your point across.

BE CLEAR ON STAFFING

Demonstrating your institutional capacity is crucial since we need to see that you've worked in a particular sector, geography, or technical area before. But don't stop there. In your technical approach, be specific about how you will reach the objectives outlined in the SOO. Whether or not you have done a similar project before, we need you to articulate how you will approach the SOO, for example, providing a clear management plan, information on data collection and metrics, and details on how you will reach the technical targets. Reviewers need this concrete information to evaluate proposals fairly. Get creative with how you showcase your overall approach, innovative ideas, and new perspectives on how to achieve the objectives in a more effective way.

IF YOU'RE UNSUCCESSFUL, TRY AGAIN

We often are faced with difficult decisions on which offeror will provide the best value to USAID for a particular activity. We are thoughtful in our decisions and take note of both the strengths and weaknesses of each proposal. We provide each unsuccessful offeror with the opportunity to request a post-award evaluation summary of their proposal, writing detailed summaries that can boost your firm's proposal-writing capabilities for future RFPs.

Be strategic on what you bid on.

INVEST sometimes receives dozens of responses to an individual RFP. We are excited about the engagement from new firms and have seen firms join the network and win their first work within a couple of months. However, the competition is strong, so firms should be strategic when deciding what to bid on. For example, if you don't have geographic or technical qualifications that are laid out in the RFP or scope, you are unlikely to be successful. Consider waiting for another RFP, or look at the list of partner network members [here](#) and identify a partner that will close those gaps.

IF YOU GET A PHONE INTERVIEW WITH INVEST

INVEST typically uses telephone interviews to gather further information from a small group of short-listed firms during the proposal review process. During a telephone interview, use your time strategically:

- Make sure you have the right people on the call. We want to hear from the technical experts that “own” the program design and implementation. Having senior management on the phone does help to show your firm is serious about its offer, but those personnel often do not provide better answers about a country context, institutional experience, or new approaches than the technical staff who will be running the project.
- Answer the question. Keep your responses concise and to the point. If there’s something you don’t know the answer to, let us know and follow up with an email response
- Demonstrate your willingness to be a partner alongside the INVEST team and the USAID team.
- If you are including partners in the interview, plan ahead of time so there is a lead person who will “receive” each question and then invite partners to provide additional responses.

GIVE US FEEDBACK!

We are always looking for ways to improve the RFP process. If there are aspects of the process that could be streamlined, or requirements that do not make sense to you, we want to hear about it. Please reach out to the INVEST team at INVEST_Procurement@dai.com with any ideas or recommendations.