

Improving RFPs with User Research

How “Summary Sheets” Can Improve Solicitations

February 2025



Introduction

How well do government IT requests for proposals (RFPs) work for vendors? New RFPs are often created by simply making minor modifications to the last RFP that was issued. But neither IT teams nor procurement teams have the capacity to consider if that de facto template meets the needs of its audience—the vendors responding to the RFP. The [2019 State CIO Survey](#) states: “CIOs have often questioned the ability of their state’s procurement entities and processes to effectively procure and contract for complex IT solutions and services under procurement laws designed in bygone eras. Additionally, CIOs consider lengthy acquisition cycles problematic as technology innovations make timely purchasing imperative.” In the six years since this publication’s release, it seems very little has changed. Procurement plays a key role in delivering government services, so it’s important to identify ways to improve it.

To this end, NASCIO and U.S. Digital Response teamed up to identify a lightweight intervention into the procurement process: a simple way for state government agencies to modify their RFP templates to be easier for vendors to evaluate. We started by surveying NASCIO corporate members, asking them about their experience of identifying, reviewing and evaluating incoming RFPs. Then we went deeper, interviewing front-line employees who perform initial reviews of solicitations and observing them as they evaluated a sample RFP. Based on what we learned from that, we developed the hypothesis that software RFPs bury the data points that are key to vendors’ initial evaluation of their suitability for a given RFP. We thought that putting those key data points right up front in an RFP would make it easier for vendors to identify solicitations that are a good fit for them, as well as to reject those that are not a good fit. We also hypothesized that this would provide states with higher-quality RFP responses. We tested that hypothesis out with another group of vendor employees, and produced a “summary sheet” that’s ready to be used with software solicitations.

This work is by no means done. We uncovered the need for substantial additional research in this space, including further validation of the highest-value information to include in the summary sheet, better understanding of agencies’ capacity to provide the information and documentation of how this process can be repeated to understand how to improve solicitations for information technology generally, and even beyond IT. (See Appendix B for details.)

Findings

Our major findings are as follows:

- **There are ten basic facts that vendors are looking for in a solicitation, but they are scattered across dozens or hundreds of pages**, if they're present at all. This makes it laborious and frustrating to review solicitations. These facts can be summarized at the beginning of an RFP to simplify review.
- **Solicitations' tables of contents are being used as a de facto summary of their contents**. The collection of section headings frequently serves as a better overview of a solicitation than any overview that's included. Tables of contents can be written with this in mind.
- **Vendors review an enormous number of solicitations, which are poorly targeted and often irrelevant to those vendors**. They report reviewing as many as 10,000 RFPs annually, with the average vendor reporting that 70% of those RFPs aren't something that they'd plausibly bid on. A quarter of vendors report that 90% of the RFPs they see are irrelevant to them.

User Research Interviews

A core tenet of user-centered design is that all design must be based on observations of the intended audience using the thing being designed. This "usability testing" is a standard part of software development and is done throughout the entire software development process.

Here, usability testing was applied to the process of evaluating solicitations, by having vendor employees share their screens and narrate their process of reviewing a new-to-them solicitation.

In short, vendors have to wade through a huge number of solicitations to identify ones that are appropriate for them, and it is laborious to review each solicitation because they are poorly and inconsistently structured.

Here are some additional notable findings:

- Sixty-eight percent of respondents reported getting government RFPs from other vendors, rather than from government channels.
- Half of respondents report that **RFPs only "sometimes" or "rarely" include a cover letter or introduction that explains the purpose of the solicitation**, requiring that they rely on language buried in the solicitation to understand its intent.
- When asked what the biggest pain points are in the contracting process, there were a wide variety of problems raised, with a strong theme of **poor communication from agencies**. Vendors say that they don't get enough information from agencies, and the information that they do receive is unclear.
- When asked what they look for in an initial scan of an RFP, there were three elements that bubbled to the top: **evaluation criteria, proposal due date and particular contractual issues** (e.g. unlimited liability and third-party liability).
- Several smaller vendors volunteered that they are **using large language models (LLMs) and generative artificial intelligence like ChatGPT** in the procurement process to analyze RFPs and generate a first draft of proposals. It's so difficult to find top-line information within the RFP that they find it easier to feed it to an LLM to interrogate than to hunt down things like what the solicitation is actually for, the budget or submission criteria.

How We Learned This

We used three phases of research: a survey, interviews and testing our prototype in a second round of interviews. We cast a broad net with the survey, asking about information technology RFPs generally, but when we moved into interviews, we narrowed the scope to solicitations for software, and how those could be structured differently to make it easier for vendors to find the most important information. (IT is an extremely broad field—our research required that we select a single solicitation for interviews, and we chose one for custom software.) We interviewed technology firm employees who identified as being the first to look at and rapidly evaluate new solicitations. The focus of this user research was this: How do front-line vendor employees perform their initial, rapid evaluation of whether an RFP might be worth their time.

When presented with a sample solicitation for software, all interview subjects did basically the same thing: quickly scanned the RFP for key information to determine if it was worth their time. Several subjects used the table of contents as an informal summary of the solicitation, saying they preferred tables of contents that are thoughtfully designed, both in terms of layout and functionality, such as being able to click on an entry and to go directly to that section. Several subjects used the search function in their PDF reader to search for key phrases that they regarded as red flags (e.g. “unlimited liability”) or good signs (e.g. “user research”).

Interviewees said that they were looking for a clear problem statement, a clear scope of work, submission criteria and requirements, budget information, the project timeline, submission deadlines and minimum vendor qualifications. Additionally, submission criteria, vendor qualifications, budget and scope appeared to be especially valued.

When asked to grade how easily they could find the most important information in the sample solicitation, **interviewees provided an average grade of D+**. Participants said that they would prefer to see their most valued information presented right up front, so they wouldn’t need to hunt around in lengthy, inconsistently structured RFPs to find information that may not turn out to be included at all.

Prototype

Based on what our interview subjects told us, we prepared a prototype of what we called a “summary sheet.” We believed that providing a one-page summary of the most important information would allow vendors to rapidly evaluate a solicitation, making it faster for them to decide whether to respond (see image on next page). Solicitations with such a summary should be an attractive prospect for review by vendors.

We then tested this prototype on a new group of vendor employees. We altered an actual

User Research Quotes

“It’s really nice when there’s a table of contents right there.”

“The table of contents is here, which I think is great...I would go straight here.”

“This would be a dream.”

“Everything was laid out nicely and everything I look for was there right off the bat.”

“It took me maybe three minutes to find my top three things that I’m looking for, which is unusual.”

solicitation, inserting a summary sheet of our own creation, but didn't tell the interview subjects that it had been altered. We presented them with the modified solicitation and asked them to narrate their review of it. We were trying to find out: *Does the addition of a summary sheet meaningfully assist front-line vendor employees in performing their initial, rapid evaluation of whether an RFP might be worth their time?*

All interviewees found the summary sheet helpful, and some were effusive in their praise of it. When this new group of participants was asked to grade how easily they could find the most important information in the solicitation, **they provided an average grade of A+.**

Respondents suggested some further additions (e.g. evaluation criteria, contact information for the contracting officer, preferred or existing tech stack, key personnel requirements and required certifications), but we did not conduct another round of interviews to test if those would be good additions.

Summary

Issue Date	January 2, 2025
Pre-Proposal Conference	February 3, 2025
Deadline for Questions	February 10, 2025
Proposal Deadline	March 2, 2025
Period of Performance	1 year, with two 1-year option periods

Scope / Executive Summary page 2	The agency's primary records system is mainframe-hosted, with most code in COBCL and data stored in Adabas, though there's a public-facing frontend built in C# on .NET. There are significant user experience problems with the existing system. This needs to be moved to Microsoft Azure and all code standardized in C# on .NET and a U.S. Web Design System front-end, with all development based on user needs uncovered through continuous user research.
Minimum Qualifications page 5	Three years of experience designing and implementing digital services for government entities. Provide references and proof of past work, including code repositories and user research artifacts.
Set-Asides page 2	None
Budget page 4	Not to exceed \$2,000,000 for the base period
Submission Criteria page 8	Submit bids via the eMarketplace portal. Page limits: <ul style="list-style-type: none"> • Technical proposal: 3 pages • Staffing plan: 3 pages • Resumes: 1 page each • User research artifacts: 30 pages.

An anonymized version of the summary sheet used in the user research.

Recommendations

Having concluded our research, we have two core recommendations for government agencies.

Recommendation #1

Attach a summary sheet to your solicitations for software, immediately after the cover sheet, and complete it entirely. If any information required for the summary sheet is not available, then the solicitation is not ready to be published. Publishing without that information is asking vendors to price for that uncertainty, which will drive up bids and runs the risk of bringing on a vendor to perform an unclear task.

Recommendation #2

Treat the table of contents as a summary of the solicitation. As a primary means of both navigating and understanding the contents of an RFP, it is not enough to rely on a table of contents auto-generated by a word processor. The section titles should use plain language, not legalese or agency-specific jargon. The layout should not be crowded, and the font should be large and easy to read. Every entry should link to its location within the document, so that readers can navigate the entire RFP with a single click.

Final Thoughts

This work is a small step toward pivoting government procurement processes to be user centered. The job of a solicitation is to convince a vendor to bid. Figuring out how to do that is a job for user research. The addition of a summary sheet is a simple, fast and cost-free way to address the major pain points experienced by vendor employees when reviewing a solicitation. The use of a summary sheet will make it easier for vendors to figure out if a solicitation is not right for them, or if it merits further review. It will help agencies to understand the information that vendors require to effectively evaluate their solicitation. And it should result in higher-quality and more relevant proposals, though more research is needed to know that for sure. This is just a starting point—much more research and design is needed to improve the experience of preparing and reviewing solicitations, and to measure the impact of those solutions.

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The authors would like to express their gratitude to the interview subjects and survey participants who took the time to participate in this research process. We must acknowledge the essential work of U.S. Digital Response volunteers Seun Adelana, Mark Mc Givern and Kate Drummond, whose project management, user research and design work comprised the lion's share of this project, and whose documented findings served as the basis for this report.

Appendix A: Summary Sheet

[Download annotated Word file](#)

Issue Date	
Pre-Proposal Conference	
Deadline for Questions	
Proposal Deadline	
Period of Performance	

Scope / Executive Summary page #	
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Minimum Qualifications page #	
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Set-Asides page #	
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Budget page #	
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Submission Criteria page #	
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Information herein is illustrative. See solicitation language for details. When language here conflicts with the solicitation language, the solicitation language shall take precedence.

Appendix B: Research Methodology

Research

Over the course of two months, we used both a survey and interviews to understand how vendors receive and review RFPs for information technology. We used the survey to understand the concerns that vendors had about reviewing RFPs, and we used the interviews to go deeper on what we learned from survey responses, focusing on software procurement.

Methods

An online survey was sent to NASCIO's corporate members via email. We received 34 responses. One-on-one interviews were conducted with representatives from eight vendors—both NASCIO members and otherwise—to better understand the experience of reviewing solicitations. Interviews were recorded and analyzed with Dovetail.

On completion of reviewing a solicitation, each interview subject was asked to score on a 1–5 scale how easily they could find the most important information. When shown a standard solicitation, the first group gave an average score of 3.4. When shown the modified solicitation, the second group gave an average score of 5.0.

Further Research

This work is only a small step toward pivoting procurement to be user-centered—much more is needed. Organizations working to improve procurement, including non-profits and government agencies, might consider engaging in further research along these lines. Here are some next steps that could be taken:

- Validate these findings and go deeper with more research with more vendors.
- Expand this research beyond software, and even beyond information technology. Every type of procurement will have its own specialized needs that must be uncovered through user research. The information needed by software development vendors is probably very different than what's important for software license resellers or janitorial services companies. A summary sheet is only as useful as the user research that led to its creation.
- Study the effects of summary sheets on procurement outcomes. Does it reduce the number of bids from inappropriate or unqualified vendors? Increase the number of bids from appropriate and qualified vendors? Affect the dollar value of the bids? The quality of the deliverables?
- Research agency procurement staff to learn about the experience of gathering and generating the information needed for the summary sheet. Is it trivial for them to complete using existing information in the solicitation, or do they need new processes to gather the information? How long does it take to complete?
- Learn how vendors find new RFPs and how agencies believe that vendors find new RFPs. What is the difference between the two?
- Research how well state procurement portals work for vendors. How do they impact discoverability of RFPs? How do they impact the evaluation of solicitations?

The authors are happy to share further information on the methodology and underlying data as may be useful for building on this research.

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About NASCIO

Founded in 1969, the National Association of State Chief Information Officers (NASCIO) represents state chief information officers (CIOs) and information technology (IT) executives and managers from the states, territories and District of Columbia. NASCIO's mission is to foster government excellence through quality business practices, information management and technology policy. NASCIO provides state CIOs and state members with products and services designed to support the challenging role of the state CIO, stimulate the exchange of information and promote the adoption of IT best practices and innovations. From national conferences to peer networking, research and publications, briefings and government affairs, NASCIO is the premier network and resource for state CIOs.

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USDR is a nonprofit, nonpartisan organization that works alongside governments at all levels to ensure they have the capacity to meet the public's needs. It leverages a network of pro bono technical expertise to address common, systemic challenges facing public servants. USDR believes that modern and resilient technology applied in the public interest can deliver people-centered services at the speed of need. It operates with humility and deep respect for partners, aiming to leave them better equipped to deliver services and support to millions of people.