Matter/Project – Short Form

Request for Proposal

# Note to Users

Users of this form may wish to execute a NDA with all prospective firms before issuing a RFP. This form presumes that a NDA is in place between potential firms and users. Use this template when requesting proposals from law firms for more less complex work.

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# Stage 1: Conflict Check

**Note to User:**

The first step to take is to ask each of the firms that you are seeking to invite to your RFP to clear conflicts before receiving your RFP. This is to ensure that firms do not see any confidential material that may form part of your RFP before clearing conflicts. Your company may have a standard procedure for asking firms to clear conflicts. Your communication will likely need to cover the following. If it is clear that no conflict clearance is required for your matter, simply proceed to Stage 2.

**Subject line: [COMPANY NAME] Requesting a Conflict Clearance for [high-level description of matter]**

[***Company name***] is considering inviting your firm to an RFP to act on its behalf in a [high-level description of matter]. Before providing your firm with the RFP, we require your firm to clear conflicts.

### Legal Entity requesting Conflict Check

**[*Company name or other legal entity within your company group that is seeking legal representation*]**

### Counterparty Name

**[*Insert Counterparty/s names*] [*Attach any documents you may with to provide law firms with in order to assist them with clearing conflicts*].**

We request that your firm clear conflicts by [***insert date***].

Your point of contact at [***Company name***] is [***insert contact name and contact details***].

You will be provided with further details in relation to this RFP once your firm has cleared conflicts.

[***You can then move to Stage 2 for all firms that have cleared conflicts***].

# Stage 2: Once Firms Have Cleared Conflicts

**Note to User:**

You can proceed to issue your RFP to all firms that have confirmed to your satisfaction that they have cleared conflicts. You may submit any questions you have regarding the RFP to the POC by the date specified in the RFP schedule. All such questions must be in writing/submitted to the POC via the designated email address. Company is not required to respond to any query submitted but, if Company does reply, may make your query as well as Company’s answer to it available to all bidders.

# RFP Overview

***Subject Line: RFP from [COMPANY NAME] in relation to [HIGH LEVEL DESCRIPTION OF YOUR REQUEST]***

[***Company name***] is seeking proposals for [***High level description of the work to be done***].

A more detailed description of the the work that we require to be done is set out below/attached [***Describe below and attach***].

We have also attached the following documents to assist you [***attach any relevant background or other documents that will assist the law firm in understanding the scope of their scope of work***].

[***Company name***]'s objective in relation to this this work is as follows: [***Clearly articulate your company's objective***].

You have been invited by [***Company name***] to submit aproposal in response to this RFP.

If you have any questions, please direct your questions to the following email [***insert point of contact and contact details***]. Any unauthorized contact with other members of our organization in relation to this RFP may disqualify you from the process.

**Contractual terms**

[***Company name***] reserves the right to accept or reject any and all proposals (whether received before or after the due date), to change or withdraw this RFP specification, to waive any formalities and/or discontinue this RFP process at any time.

This RFP is not, and should not be construed as, an agreement to purchase goods or services from any Firm. Please note that [***Company name***] will not be responsible for any costs associated with your preparation or submission of a reply to this RFP; indeed, you are solely responsible for all costs incurred in your preparation and presentation of a response.

[***Company name***] looks forward to receiving confirmation of your firm’s intention to participate in this RFP and, in due course, your firm’s proposal in response to this RFP.

# Pricing

**Note to User:**

Now you can ask any pricing information in the 'Pricing' section below. We have started you off with examples of hourly rate information you can ask for, fixed pricing for various phases and a total fee cap. You can choose, modify or delete any of those, and/or add your own. We have also started you off with example questions that you may wish to ask in the 'Questionnaire' section below. Again you can choose, modify or delete any of those, and/or add your own.

[***Company Name***] is looking for a [***insert Preferred Pricing Model***] engagement.

\*Choose your Preferred Pricing Model from the list below:

* None
* Fixed Feed
* Capped Fee
* Contingency Fee
* Success Fee
* Hourly Rates
* Estimate Only
* Other

## Pricing Breakdown

**Note to User:**

You can ask firms to complete the parts of the following table that is relevant to your RFP.

|  |  |  |  |
| --- | --- | --- | --- |
| **Item**  | **Preferred Pricing Model** | **Description** | **$USD** |
| Phase 1 Deliverable: [INSERT HEADING] | Fixed Fee | Provide a description here of the first phase of work you require to be delivered, and any milestones to be achieved as part of that first phase. Add any more phases and their descriptions as required for your RFP.  |  |

# Questionnaire

**Note to User:**

You can ask your firms to provide the following information in the table that are relevant to your RFP.

|  |  |
| --- | --- |
| **Topic** | **Description** |
| Team | Please provide a brief description of the key people expected to work on the matter, including their relevant expertise or experience. |
| Assumptions | Please list the specific assumptions that form the basis for the pricing, schedules and plan for your proposal. |
| Exclusions | Please list any limitations or exceptions related to your proposal. In other words, what will be excluded from your scope of work. |
| Why Your Firm? | Please explain why your firm is better suited than your competitors to take on this matter. Please keep your answer brief, to the point and focused. General statements that any one of your competitors could make are not helpful |