

# Best Practices for Using AI to Draft RFPs

## 1. Understand What AI Can and Cannot Do

- AI can help generate, refine, and structure RFPs based on your inputs.
- It is not a substitute for human oversight—always review and tailor the AI-generated output to your needs.
- AI is most effective when given clear instructions and examples to follow.

## 2. Protect Confidential and Sensitive Information

- **Do not** upload client data, personally identifiable information (PII), or proprietary details into AI tools.
- Redact or generalize sensitive information before submitting prompts.
- If your organization has AI usage policies, ensure you comply with them.

## 3. Use High-Quality Reference Materials

- Upload well-structured sample RFPs from your organization's library to guide AI output.
- Provide a clear and detailed project description for AI to work from.
- The more relevant examples you provide, the better AI can tailor the response.

## 4. Craft Clear and Specific Prompts

- Clearly state what you need, such as structure, tone, or specific sections.
- Specify key details such as project scope, timeline, evaluation criteria, and required deliverables.
- Use iterative prompting—refine the AI's response by asking for improvements or modifications.

## 5. Review and Edit AI-Generated Drafts

- Always review AI-generated RFPs for accuracy, clarity, and completeness.
- Ensure the RFP aligns with your organization's mission, goals, and legal requirements.
- Seek feedback from colleagues to validate content before publishing.

## **6. Customize for Your Audience**

- Ensure the language is clear and accessible to potential vendors.
- Avoid overly complex or vague descriptions—be precise in defining expectations.
- If using a previous RFP as a template, update all project-specific details.

## **7. Use AI to Improve Rather Than Replace Human Input**

- AI can draft sections, suggest revisions, and help structure the document, but final approval should come from project stakeholders.
- Consider using AI to generate FAQs, evaluation rubrics, or vendor questions for an RFP.
- Leverage AI to streamline your process, but always apply human judgment to ensure quality and relevance.

## **8. Example AI Prompts for RFP Drafting** (Refer to the attached list of sample prompts for guidance.)

By following these best practices, you can efficiently and securely use AI to assist in drafting high-quality RFPs while maintaining compliance and protecting sensitive information.