

<Company Logo Here>

Request for Proposal

<Project Name>

<RFP Release Date>

<Company Name>

<123 Main Street>

<Suite 1>

<Any Town, Your State, Postal Code>

Table of Contents

<u>Section</u>	<u>Page</u>
0.0	Introduction
1.0	Schedule of Events
2.0	Standard and Special Terms & Conditions
2.1	Payment Terms
2.2	Ownership of Deliverables
2.3	Non-Disclosure of Confidential Information
3.0	General Information
3.1	Definitions
3.2	Purpose of this Request
3.3	Company Background
3.4	<Background on Software>
3.5	Method of Payment
3.6	Contract Term
3.7	Presentations and Demonstrations
3.8	Pre Proposal Conference
4.0	Functional Overview
4.1	Strategic Context
4.2	Engagement Scope
5.0	Technical Specifications
5.1	Resources to be provided by <Company>
5.2	Resources to be provided by the Vendor

- 5.3 Deliverable Specification
- 5.4 Project Management
- 5.5 Overview of Deliverables
- 5.6 Warranty
- 5.7 Product Architecture
- 6.0 High Level Project Requirements
 - 6.1 Standards & Conventions
 - 6.2 Project Management
 - 6.3 Engagement Governance
 - 6.4 Technical Requirements
 - 6.5 Testing
- 7.0 Required Vendor Information
 - 7.1 Organization
 - 7.2 Project Experience
 - 7.3 Project Management
 - 7.4 Technical Experience
 - 7.5 I Infrastructure
 - 7.6 References
- 8.0 Proposal Response Format
- 9.0 Vendor Proposal
 - 9.1 Project Approach
 - 9.2 Staffing Proposal
 - 9.3 Project Timing Proposal

- 9.4 Project Cost Proposal
- 9.5 Proposal Assumptions
- 9.6 Proposal Risks & Mitigations
- 9.7 <Company> Time and Support
- 9.8 Sample Contract
- 10.0 Method of Evaluations & Award
 - 10.1 Evaluation Criteria
 - 10.2 Discussions and Best and Final Offers

Appendix A

0.0 Introduction

- 0.1** This request for proposal is an invitation to a select group of companies to submit proposals for a project to <project objectives>. This project will be established as <Project Name> and has as its ultimate objective the <primary project goal>.
- 0.2** The intent is to obtain information leading to the selection of one (1) or more vendors to participate in this project. Through this process <Company Name> seeks to develop operational relationships with offshore development vendors who can support <overarching outsourcing objective>.

All questions and inquiries regarding this RFP should be directed to:

<Point of Contact Name>
<Title>
<Company Name>
<Company Address>

(999) 555-1234 Phone
(999) 555-5678 Fax
<e-mail address>

1.0 Schedule of Events

Event Description Date

<Specify all events where you will be setting deadlines or expecting action. Following are some examples.>

Deadline for Receipt of Written Inquiries
Written Responses Delivered
Bidder's Conference
Proposal Due Date
Evaluation Period Ends
Notification of Selection of Finalists

2.0 Standard and Special Terms & Conditions

2.1 Payment Terms

<Specify any relevant payment terms that you want known up front, or which may impact the way a vendor bids on the proposal.>

2.11

2.12

2.13

2.2 Ownership of Deliverables

<If you expect to own everything, say so. Be clear on how you expect to handle IP ownership.>

2.21

2.22

2.23

2.3 Non-Disclosure of Confidential Information

2.31 Release of this Request is conditioned upon the execution of a Non-Disclosure Agreement between <Company> and Vendor governing the information provided by <Company> to specify the work upon which the bid is based, and the proposal which <Company> shall receive from Vendor.

2.32 The establishment of a contract between <Company> and Vendor based in whole or in part upon the Proposal which results from this Request shall include further specification of Non-Disclosure regarding the information necessary to deliver the requested services throughout the course of executing said contract.

3.0 General Information

3.1 Definitions

<Define any acronyms contained in the RFP. Define any terms you expect to see used in the contract or in the proposal.>

3.11

3.12

3.13

3.2 Purpose of this Request for Proposal

The purpose of this RFP is to solicit proposals from qualified software development organizations to meet certain requirements and project objectives as established by the <sponsoring organization>. The conclusion of this process will result in the selection of one (1) or more vendors who will be invited to enter a contracting phase for a specific and detailed scope of work along with Best and Final Fixed Pricing for the designated units of work.

3.3 Company Background

<Provide a summary of your company. Marketing collateral is a good start.>

3.4 <Background on Software>

<If this is a proposal for an existing software product, provide an overview of this software. If this is a proposal to build new software, describe the use cases that you intend the application to address.>

3.5 Method of Payment

<Outline how you plan to pay for the service.>

3.6 Contract Term

The term of the contract that will be awarded at the end of this request process will commence upon <Company's> execution of the contract and will extend no longer than the duration of the project required to complete the designated deliverables, or a termination date which will be specified in the contract itself. Upon the acceptance of the final deliverable, the contract will be deemed satisfied. <Company> makes no commitment to follow-on work following this process. Subsequent contract grants will be based upon <Company's> discretion and upon the quality of the work performed on this project.

3.7 Presentations and Demonstrations

<Will you include a formal presentation of the proposal? In person or by phone? If not, will you accept any other form of communication about the proposal? Also, how and when will these be scheduled?>

3.8 Pre Proposal Conference

<Will you offer a Bidder's conference (meeting of all the bidders to ask questions) or will you offer a written Q&A process? What are the logistics?>

4.0 Functional Overview

4.1 Strategic Context

<What is the objective you are trying to achieve in terms of going to an outsourced vendor. This outlines the strategic context in which the overall outsourcing venture will happen.>

4.11

4.12

4.13

4.2 Engagement Scope

<What is the scope of this proposal? What are the major outcomes that you expect to achieve from this activity?>

4.21

4.22

4.23

5.0 Technical Specifications

5.1 Resources to be provided by <Company>

<What artifacts will you provide to the vendor in order to enable them to execute the work they are bidding on. What inputs should they expect from you?>

5.11

5.12

5.13

5.2 Resources to be provided by the Vendor

The vendor will be expected to provide the following items:

<Itemize the tools or components the vendor is expected to provide (typically not billed as part of the contract).>

5.21

5.22

5.23

5.3 Deliverable Specification

5.31 All technical deliverables will be expected to conform to a standard format.

<Be very clear about what you expect to get back from the vendor. What artifacts should/must be included in a deliverable? This is very important because the vendor may need to estimate for that item.>

5.32

5.33

5.4 Project Management

<Who is responsible for project management and controlling the vendor developers? Will you do that, or do you expect the vendor to provide staff for that?>

5.41 A status reporting protocol will be established on a weekly basis to report progress, issues and upcoming deliverables.

5.42

5.43

5.5 Overview of Deliverables

5.51 At a minimum the following deliverables will be required as a part of the ensuing contract.

<Itemize with as much granularity as possible the individual deliverables which the vendor must provide and the acceptable format of delivery.>

5.52

5.53

5.6 Warranty

<Be clear what kind of warranty support you expect once the final deliverable is provided. What is included in that level of support? How will it be measured?>

(example) Vendor will be required to provide a Warranty for 60 days following the delivery of the final technical deliverable. During this period, defects discovered in the code can be returned to be corrected and retested. Warranty will be considered a single deliverable and will be billed at the end of the warranty period for the agreed fixed price.

5.61

5.62

5.63

5.7 Product Architecture

<If this proposal is for an existing software product, provide an overview of the product architecture – especially if you expect the vendor to comply. If this is for new software, then specify any architectural frameworks that the solution must comply with.>

5.71

5.72

5.73

6.0 High Level Project Requirements

6.1 Standards & Conventions

<What standards do you expect to see in the final product?>

6.11

6.12

6.13

6.2 Project Management

<Who will be responsible for developing project management and what outputs do you expect?>

6.21

6.22

6.23

6.3 Engagement Governance

<How are you going to stay on top of the entire relationship and get updated on the details of what is going on? I've provided a sample below. Feel free to customize.>

6.31 On a monthly basis, Vendor shall present a formal report of progress and accomplishment.

6.32 The monthly progress report shall address at a minimum the following items:

- Major accomplishments of the past month
- Major disappointments of the past month
- Project Schedule Fidelity
- Project Progress
- Summary of Risks & mitigation activities
- Summary of Issues and Impacts
- Dependencies upon <Company> personnel

6.33 Realization of a Risk documented in the project plan shall be escalated to the designated <Company> contact within 1 day of discovery

6.34

6.35

6.4 Technical Requirements

<What technical requirements do you expect the vendor to comply with? What would cause you to be unhappy or reject a deliverable. Be as clear up front as you possibly can.>

6.5 Testing

<Specify what testing you expect the vendor to do. Clearly outline any testing that you want to do yourself, and do not want the vendor to do.>

7.0 Required Vendor Information

7.01 This Section 7 specifies the requirements that submitting vendors must address in order to participate in the vendor evaluation process and qualify to receive work associated with this RFP.

7.02 For each requirement you should provide a concise, complete and accurate response. If desired, additional supporting materials can be attached as an appendix to your response.

<Add other items as appropriate.>

7.02

7.03

7.1 Organization

7.11 Provide an overview of your company, including date of incorporation, operating locations, number of employees, area(s) of specialty, number of successful projects with US-based customers

7.12 Describe your organizational structure and explain how your organization qualifies to be responsive to the requirements of this RFP

7.13 Describe the types of project organizations with which you have experience and indicate the relative number of projects run under each option (i.e. 100% onshore. 100% offshore, Onshore PM, offshore development team, etc).

7.14 Have you ever worked with a client organization on the first project to utilize offshore development? If so, describe the kinds of actions and strategies you employed to overcome the client's inexperience with offshore software development.

- 7.15** Do you regularly maintain a bench of available resources? If so, how much capacity is routinely available? If not, how do you respond to rapid increases in project staffing demand?
- 7.16** Describe how you screen and select employees. What thresholds of skill must they establish? What kinds of checks and verifications do you perform? What was your developer turnover rate over the last 12 months?

7.2 Project Experience

- 7.21** State whether you have worked on projects requiring similar functionality. Provide a brief description of the project including project scope overview, staffing size, project duration, project organization and key deliverables.
- 7.22** Describe your experience working on projects that are within the <specify your industry> industry? Provide special attention to experience relevant to <special interest area, if appropriate>.
- 7.23** Describe your experience with respect to the following standards:
- <List the standards that are relevant to this project.>
- 7.24** State whether you have ever provided products or services to any of the following companies or organizations. If so, please describe the nature of the engagement and the deliverables produced.
- <If you care about the vendor having worked with other companies, such as your competitors, list them here.>

7.3 Project Management

- 7.31** Describe the project life cycle methodologies with which you are familiar and provide a summary of your experience with each methodology (i.e. waterfall, agile, iterative, etc).
- 7.42** Describe your experience levels with project management. State how you ordinarily scope, estimate, assign resources and measure progress to plan.
- 7.42** Describe your test methodology and how you plan, execute and certify the following types of testing.
- Unit Testing
 - System Testing

- Integration Testing

7.42 State whether you have a formal or informal SEI-CMM or SEI-CMMi rating. State whether you have been assessed for any other capability maturity models and provide details.

7.4 Technical Experience

7.41 Describe your experience with <Technology>. Indicate the number of trained resources and their relative levels of skill as well as the number of successful projects using this technology.

7.42 Describe your experience working with <Technology>. State the nature of the service and what your role was in the creation and deployment of the solution.

7.43 Describe your experience with developing applications for the internet using web technology. List the web technology products and platforms with which you are familiar and the degree of knowledge you possess for each?

7.44 Describe your preferred testing methodology and approach to code certification and describe the tools you use, the methodologies do you follow, and what standard documentation you produce.

7.44 State whether you are you a <Software OEM> Certified Partner, and if so, at what level. Provide a summary of the number and level of certified developers you have on your staff. If you possess any other certifications, describe them here.

7.5 Infrastructure

7.51 Describe the server infrastructure that you manage on site at your locations and how it is maintained.

7.52 Describe how you normally establish connectivity with your client organizations?

7.53 Describe the communications infrastructure that is in place within your organization to facilitate the escalation and resolution of questions and issues during a project.

7.54 State whether you have any infrastructure in place for conducting performance based testing, and if so, describe the infrastructure, utilities,

and your experience conducting various forms of performance testing (stress, load, volume, etc).

7.6 References

- 7.61** Provide a minimum of three (3) trade references including the names of persons who may be contacted, position of person, address and phone numbers where similar products or services similar in scope to the requirements of this RFP have been provided.
- 7.62** Provide a selection of resumes or Bios for the types of resources you would anticipate assigning to this project were you to be awarded the contract.

8.0 RFP Responses and Format

- 8.1** Responses to this proposal must be submitted in the following fashion:
- Hard copy on 8 1/2 x 11 inch white paper double sided
 - Fold outs containing charts, spreadsheets and oversize exhibits are permissible.
 - The pages should be placed in a binder with tabs separating the sections of the proposal.
 - Two (2) printed copies must be provided.
 - An electronic copy shall also be provided in Microsoft Word. This copy may be provided via e-mail provided the size of any attachments are less than 10 MB.
 - Attachments and supplements may be provided in alternate formats such as Microsoft Excel, Microsoft PowerPoint and Adobe Acrobat (.pdf).
 - All responses, as well as any reference materials, should be written in English.
- 8.2** If your response to this RFP is not submitted in the required format, it may not be considered for evaluation.
- 8.3** Proposals shall respond to the RFP requirements by restating the number and text of the requirement in sequence and writing the response immediately after the requirement statement.

- 8.4** Figures and tables must be numbered and referenced in the text by that number. They shall be placed as close as possible to the referencing text.
- 8.5** Pages must be numbered consecutively throughout the entire proposal. Page numbers shall be displayed on every page in a consistent location.
- 8.6** Proposals shall be based only on the materials contained in this RFP. The RFP includes official responses to properly submitted questions during the response period as well as any other materials distributed during the RFP process clearly marked as elements of the RFP.
- 8.7** Proposals should be to the point. Excessive length is strongly discouraged. Supplemental materials may be provided in attached appendices.

9.0 Vendor Proposal

- 9.01** All responding vendors must develop a response addressing the full scope of work that is identified in this RFP.
- 9.02** This Section 9 outlines the mandatory and minimum elements of your response in order for it to enter the evaluation process and for you to be considered for work under this RFP.
- 9.02** You may include additional elements in your response if you believe that such additional information would be necessary or desirable for <Company> to properly understand and evaluate your offering.

9.1 Project Approach

Describe the the general approach you would take for this project, and how you propose to initiate, maintain and close out the project. Include specific references to the project methodology and the desired relationship between <Company> and your firm.

9.2 Staffing Proposal

Describe the skill sets, numbers and locations of the staff you propose to use for this project. Provide a brief overview of the contributions you that you expect each unique skill set would make to the project.

9.3 Project Timing Proposal

- 9.31** Based on the approach and staffing outlined above, provide a project timeline that commences with a contract award date of <date>. Your timeline should identify all major project milestones and indicate the dates

associated with the project deliverables in Section 5.5, "Overview of Deliverables."

- 9.32** Describe your estimating methodology and the methods you employed to determine the person-hour effort associated with this project. Provide sample data from your estimating process to illustrate this methodology.
- 9.33** Provide the total number of hours associated with the following tasks/resources:
- Total Project Hours
 - Project Management
 - Software Engineering/Development
 - Testing & QA
 - Software Warranty
 - Infrastructure management

9.4 Project Cost Proposal

- 9.41** Provide a cost proposal which includes the total cost to be charged as well as the cost broken out by the following categories:
- <Fixed Bid Deliverable Projects> Allocate a fixed cost to each of the deliverables identified in Section 5.5 Overview of Deliverables
 - Itemize any costs not directly related to the production of deliverables above
- 9.42** Provide a schedule of hourly rates for the various roles and skill levels to be assigned to this project.

9.5 Proposal Assumptions

- 9.51** List any assumptions you have made regarding your execution of the project.
- 9.52** List any assumptions you have made regarding the activities of <Company> in executing the project.
- 9.53** List any other assumptions you have made in preparing your response to this RFP.

9.6 Proposal Risks & Mitigations

- 9.61** List any risks that you have identified that may be associated with this project.
- 9.62** For each risk you identify, indicate your best assessment of the likelihood of its having an impact on the success of the project and rate the magnitude of impact (High, Medium, Low) .
- 9.63** For each such risk, identify your response to those risks:
- Accept the risk
 - Mitigate the risk in some fashion (provide details)

9.7 <Company> Time and Support

- 9.71** List any requirements for <Company> time and resources that will be needed to support your project effort.
- 9.72** List any skill sets required of <Company>'s personnel.
- 9.73** List the various types of interaction required between <Company>'s and your personnel and the estimated frequency of such interactions.

9.8 Sample Contract

<If you already have a contract you wish to use to support the project, you can skip this section. Alternatively, this is a good advanced method for understanding how the vendor likes to structure work.>

Provide a Contract for the type of work being proposed to this request. This contract should reflect the types of conditions, stipulations and terms that would be expected for this type of contract.

10.0 Method of Evaluations & Award

- 10.01** All vendor responses received pursuant to this RFP will be logged and accepted into our evaluation process.
- 10.02** Only those responses conforming to the required response standards will be considered for evaluation and potential award. All non-conforming responses will be marked as "Disqualified," and the affected respondent will be notified that its response will be denied further consideration.

10.1 Evaluation Criteria

10.11 <Company> will evaluate proposal responses based on their compliance with response requirements and such other evaluation criteria as <Company>, in its sole discretion, deems appropriate.

10.12 <Company>'s ultimate decision to award or not award a contract under this RFP shall be in <Company>'s sole discretion.

10.2 Discussions and Best and Final Offers

10.21 <Company> may, in its sole discretion, either accept a responding vendor's initial proposal response by award of a contract, or <Company> may enter into subsequent discussions with a number responding vendors whose proposal responses merit further discussion.

10.22 In the event <Company> enters into subsequent discussions with a number of responding vendors, <Company> may request that certain responding vendors submit a "Best and Final Offer" for consideration.

Appendices

And Supporting Materials

Appendix A

<Use the Appendices to provide reference materials that the vendor should use in forming the proposal. This could include items such as standards, screenshots, your own estimates of the work.>