

REQUEST FOR PROPOSAL
(Generic IT RFP Template)

INSERT PROJECT NAME

INSERT CLIENT NAME

INSERT DATE

Date: INSERT DATE

Due Date of Response: INSERT DATE

TABLE OF CONTENTS

<u>SECTION</u>	<u>PAGE</u>
1.0 INTRODUCTION	
1.1 BACKGROUND	
1.2 SCOPE	
2.0 SPECIFICATIONS/REQUIREMENTS	
2.1 INSERT HEADING	
2.2 INSERT HEADING	
3.0 SUPPLIER EVALUATION CRITERIA	
3.1 SUPPLIER BACKGROUND	
3.2 STRATEGIC PARTNERSHIPS	
3.3 REFERENCES	
3.4 FINANCIAL STABILITY	
3.5 CERTIFICATE OF INSURANCE	
3.6 PROJECT CONTRACTS	

- 3.7 **PRICING**
- 3.8 **IMPLEMENTATION PROCESS**
- 3.9 **TRAINING**
- 3.10 **DELIVERY AND PAYMENT SCHEDULES**
- 4.0 **HOW TO RESPOND TO THIS RFP**
- 4.1 **ACKNOWLEDGEMENT OF RECEIPT OF RFP**
- 4.2 **RFP DOCUMENT AND RESPONSES**
- 4.3 **DETAILED RFP QUESTIONS - SUPPLIER WORKSHEET**
- 4.4 **QUESTIONS ABOUT THIS RFP AND FOLLOW-UP**
- 4.5 **DUE DATE**
- 4.6 **RFP IS PROPERTY OF CLIENT NAME**
- 4.7 **PROPOSAL EXPENSES**
- 4.8 **MODIFICATION OR TERMINATION OF RFP**
- 5.0 **APPENDIX 1: PROJECT CONTRACTS**
- 6.0 **APPENDIX 2: PRICING CHART FOR PROPOSED SOLUTION**
- 7.0 **APPENDIX 3: SUPPLIER WORKSHEET**
- 8.0 **APPENDIX 4: OTHER ADDENDA (SUPPLIER DISCRETION)**

1.0 INTRODUCTION

CLIENT NAME ("CLIENT SHORT NAME") is requesting proposals from Suppliers ("you") for its [DESCRIBE YOUR PROJECT IN GENERAL TERMS] ("the Project") as described more fully in this Request for Proposal ("RFP").

1.1 Background

[CLIENT SHORT NAME] is [GENERALLY DESCRIBE YOURSELF AND YOUR BUSINESS]. To learn more about [CLIENT SHORT NAME], visit [CLIENT WEB SITE URL].

DESCRIBE CLIENT

1.2 Scope

[HERE BUYER MUST DESCRIBE DETAILS OF THE HARDWARE, SOFTWARE AND/OR SERVICES BEING SOURCED.

INCLUDE A GENERAL DESCRIPTION OF FUNCTIONALITY, OPERATING ENVIRONMENT, COMPATIBILITY REQUIREMENTS, INTEROPERABILITY REQUIREMENTS, DATABASE STRUCTURE, ETC.

IF SEEKING AN ENHANCEMENT TO AN EXISTING SYSTEM, DESCRIBE YOUR EXISTING SYSTEM AND THE ENHANCED FUNCTIONALITY OR OTHER ENHANCEMENT SOUGHT. IF REPLACING AN EXISTING SYSTEM, DESCRIBE THE EXISTING SYSTEM IN DETAIL AND THE REASONS FOR SEEKING A NEW SYSTEM, INCLUDING A DESCRIPTION OF ANY ENHANCED FUNCTIONALITY OR OTHER ENHANCEMENT FOR THE NEW SYSTEM.

FOR THIS INITIAL DESCRIPTION OF SCOPE, IT IS BETTER TO ERR ON THE SIDE OF OVER-BREADTH. BE GENERAL, BUT BE INCLUSIVE. CONSIDER THIS A HIGH-LEVEL STATEMENT OF SCOPE.]

2.0 SPECIFICATIONS AND REQUIREMENTS

HERE BUYER MUST PRESENT DETAILED SPECIFICATIONS AND REQUIREMENTS FOR THE PROJECT. SUFFICIENT DETAIL MUST BE PROVIDED IN ORDER TO ALLOW THE SUPPLIER TO SELECT ITS MOST APPROPRIATE HARDWARE, SOFTWARE AND/OR SERVICES SET.

NOTE THAT THE DESIRED FUNCTIONALITY, ETC., DESCRIBED HERE WILL LIKELY FORM THE BASIS FOR MOST QUESTIONS POSED IN THE "SUPPLIER WORKSHEET" (SEE BELOW).

SPECIFICATIONS OR REQUIREMENTS LISTED UNDER VARIOUS HEADINGS BELOW MIGHT INCLUDE:

- EQUIPMENT REQUIREMENTS, DESCRIPTION, AND SPECIFICATIONS.
- SERVICE REQUIREMENTS, DESCRIPTION AND SPECIFICATIONS.
- YOUR ANTICIPATED PROJECT RESPONSIBILITIES.
- SUPPLIER'S ANTICIPATED PROJECT RESPONSIBILITIES.

2.1 **Insert Heading**

INSERT TEXT

2.1.1 **Insert Heading**

INSERT TEXT

2.1.2 **Insert Heading**

INSERT TEXT

2.2 **Insert Heading**

INSERT TEXT

2.2.1 **Insert Heading**

INSERT TEXT

2.2.2 **Insert Heading**

INSERT TEXT

3.0 **SUPPLIER EVALUATION CRITERIA**

You will be evaluated mainly based on the criteria set forth in this Section 3. [CLIENT SHORT NAME] reserves the right in its discretion to evaluate Suppliers based on additional criteria not set forth in this Section 3.

3.1 **Supplier Background**

You should provide basic information about your company; e.g., whether privately or publicly owned, number of years in business, states and international locations in which it does business, and other background information that may be relevant to [CLIENT SHORT NAME]'s award of a contract under this RFP.

3.1.1 **Overview of Supplier**

You should provide an overview of your company, its primary business operations, and its industry focus.

3.1.2 **Supplier's Geographic Locations**

You should list your geographic locations (offices) and the number of staff dedicated to each location.

3.2 **Strategic Partnerships**

You should list any strategic business partners or alliances, describe their role in your operations, and state why they might be of potential value for the Project.

3.3 References

You must provide at least three (3) references for which you have undertaken a project similar to the Project. Include the company name, a brief description of the product and/or services you provided, a contact person and telephone number.

3.4 Financial Stability

You must provide audited financial statements and interim financial statements for the current calendar year-to-date.

3.5 Certificate(s) of Insurance

You must provide a Certificate or Certificates of Insurance that describes the insurance coverages you presently carry (General Liability, Automobile Liability, Worker's Compensation, and Professional Liability), including the Limits of Insurance afforded under each insurance policy.

3.6 Project Contracts

The following specimen contracts for the Project are included in attached Appendix 1:

[LIST]

3.6.1 Contract Review and Comment

You must review the specimen contracts contained in Appendix 1 and include, as part of your response to this RFP, identification of any contractual provision that is not acceptable to you. For each such provision identified, you should include an alternative provision (alternative wording) for our consideration.

3.6.2 Acceptance of Contract Terms and Conditions

If the terms and conditions of the specimen contracts contained in Appendix 1 (short of necessary fill-ins, completion of exhibits, etc.) are

acceptable to you in total, you should so indicate in your response to this RFP. If you identify provisions that are not acceptable (and provide alternative language), you should indicate in your proposal that the other terms and conditions are acceptable to you.

3.6.3 Scoring Based on Contract Terms and Conditions

Among other factors, your proposal will be scored based on the degree to which the terms of these specimen contracts are acceptable to you. A “Did Not Review” or “To Be Reviewed” response to this Section 3.6 may result in your not being considered further for the Project.

3.7 Pricing

Use attached Appendix 2 to provide the pricing for your products and services.

3.7.1 Specific Elements of Pricing

Describe and explain the pricing terms for your products and services, including any maintenance fees, support fees, training fees and any other miscellaneous expenses. For professional services fees, include your current rate card.

3.7.2 Firm Pricing

The prices quoted shall be valid and binding and not subject to change for a period of one hundred-twenty (120) days following the due date for the submission of responses to this RFP. Each proposal shall provide the most detailed price breakdown possible vis-à-vis the the nature of the Project, your proposed solution for the Project, and your plan for completion of the Project.

3.7.3 All-Inclusive Pricing

Your proposal shall be inclusive of all charges relating to the project, such as supplies, postage, shipping charges, charges to equipment,

utilities, telecommunications, environment and space charges, updates, tools and taxes.

3.8 Implementation Process

Describe your proposed implementation plans, including project phases, milestones, major deliverables and timelines.

3.9 Training

Describe how training and knowledge transfer will be accomplished for the Project. Indicate how many days of training you anticipate, availability of training locations (including availability of on-site training at [CLIENT SHORT NAME]'s premises), and prices for training sessions (e.g., per session, per person, or another basis).

3.10 Delivery and Payment Schedules

Provide a schedule of estimated completion dates for specific tasks and milestones for the Project and a breakdown of product and/or services costs.

3.10.1 Project Timeline

Provide a detailed timeline for the Project in which you identify estimated start and completion dates for specific tasks and milestones for the Project.

3.10.2 Payment Schedule and

Provide a payment schedule under which payments are tied to the completion of specific tasks and milestones for the Project.

4.0 HOW TO RESPOND TO THIS RFP

You must follow the instructions and guidelines in this Section 4 when responding to this RFP.

4.1 Acknowledgement of Receipt of RFP

You must respond no later than [INSERT DATE] to verify that you have received this RFP and to state whether you will be providing a response. This communication should be sent via e-mail to the person and e-mail address set forth in Section 4.4.

4.2 RFP Document and Responses

You must adhere to the following guidelines when responding to this RFP.

4.2.1 Minimum Content

This RFP document suggests and requires the minimum content and general format for you to complete your response and return it within the specified timeframe. In order for your proposal to receive full consideration, it is imperative that you accurately and completely respond to all sections of this RFP and clearly demonstrate your understanding of the requirements and specifications for the project. When a specific format for your response is requested, you must use the requested format.

4.2.2 Responses and Non-Responses Considered

Your responses, as well as your failure to respond (or failure to respond completely) to particular items, will be evaluated and used in our Supplier qualification review process.

4.2.3 Numbering of Responses

Your responses should be numbered and ordered to match the sections and subsections of this RFP.

4.2.4 Optional Appendix 4

In your discretion, you may attach to Appendix 4 additional information and documentation (e.g., work flow charts, schematics, etc.) that might assist our Supplier qualification review process.

[SECTION 4.3 IS FOR SOFTWARE PURCHASES ONLY]

[BUYER SHOULD PREPARE A LIST OF QUESTIONS FOR SUPPLIERS THAT ALLOWS SUPPLIERS TO “SELF-GRADE” THE CURRENT FUNCTIONALITY OF THEIR BASE SOFTWARE AND ITS CURRENT CONFIGURABILITY, COMPATIBILITY, INTEROPERABILITY AND STATE OF INTEGRATION WITH OTHER APPLICATIONS AND SYSTEMS. REFERENCE SECTION 2, SPECIFICATIONS AND REQUIREMENTS.]

4.3 Detailed RFP Questions – Supplier Worksheet

Included as Appendix 3 of this RFP is a worksheet titled “Supplier Worksheet” that has been designed to elicit important information about your firm and its products and services.. You must respond to every question posed in this Supplier Worksheet.

4.3.1 Preserve Numbering and Format

You **MUST NOT** change the requirement numbering or insert/delete rows or columns in the Supplier Worksheet.

4.3.2 Scoring and Supplier Comments

The questions are arranged in tabular form, and space is provided for you to score your response, provide explanatory comments, and to reference sources of relevant information (e.g., software documentation).

4.3.3 Grading

In the “Grade” column, you must respond with one of the following:

2 – Requirement completely met by base software; no modifications or workarounds required

1 – Requirement partially met; workarounds or code modifications to base software required

0 – Requirement not met

4.3.4 **Grading Explanation**

In the “Response” column, provide an explanation of the basis for your graded response. For any response of “0” (requirement not met) or “1” (requirement partially met), you should describe how the particular requirement can be fully satisfied.

When code modifications will be required, you should state so explicitly and describe the nature and extent of modification required.

4.3.5 **Impact of Future Releases**

Your responses within the Supplier Worksheet shall be based solely on the current (last released) version of your base software, regardless of whether a planned or in-progress revision or release might give you reason to offer a more favorable graded score. You may note in the “Response” column the fact that a specification or requirement will be partially or fully addressed by a planned or in progress revision to or release of the current version of your base software.

4.4 **Questions About This RFP and Follow-Up**

A single point of contact has been established for all pre-proposal questions and follow-up relating to this RFP. You should direct all questions and your final response submission to:

[CLIENT CONTACT PERSON
TITLE
CLIENT NAME
PHYSICAL ADDRESS
TELEPHONE PHONE NUMBER
FAX NUMBER
E-MAIL ADDRESS]

All pre-proposal questions should be e-mailed no later than [INSERT DATE].

Bidding suppliers' questions and our responses will be provided to other bidding suppliers.

4.5 **Due Date**

One (1) printed and one (1) electronic copy of your proposal must be returned by end of business (5:00 PM CST) on [INSERT DATE]. The hard copy may arrive up to twenty-four (24) hours after the electronic copy has been received.

4.6 **RFP is Property of CLIENT NAME**

This RFP, and all descriptions of [CLIENT NAME]'s current business, business plans, current and prospective customers, systems, software and processes included, provided or otherwise communicated as part of this RFP or RFP process, are confidential and proprietary to [CLIENT NAME], may only be used in connection with your response to this RFP, and may not be disclosed to any third party. You agree that, should you and we not execute a definitive contract in furtherance of this RFP, you shall return this RFP, all written materials provided to you by [CLIENT NAME], and all copies thereof to the person and address identified in Section 4.4.

4.7 **Proposal Expenses**

All expenses incurred by you through your participation in this RFP process, your development of a response, and any subsequent negotiations that may occur, including all site visits, document preparation, communications, and demonstrations, shall be your sole responsibility and shall not be chargeable to, or subject to reimbursement by, [CLIENT NAME].

4.8 **Modification or Termination of RFP**

[CLIENT NAME] reserves the right, in its sole discretion and without incurring any liability to any party to modify or terminate this RFP, for any reason and at any time, prior to execution of a definitive contract. Any

subsequent modification or termination of this RFP shall not affect a supplier's sole responsibility for expenses as described in Section 4.7 above.

[CLIENT NAME] reserves the right to accept or reject any or all proposals or bids received under this RFP and any subsequent modification to this RFP.

This RFP does not establish any current or future obligation to purchase any products or services. [CLIENT NAME] reserves the right, in its sole discretion and without incurring any liability to suppliers, their affiliates, contractors or subcontractors, or the owners, agents or employees of any of them, to modify or terminate this RFP, for any reason, and at any time, prior to the execution of a definitive contract.

This RFP and your responses and proposal may, at [CLIENT NAME]'s sole discretion, be included as part of any related contract or contracts between your firm and [CLIENT NAME].

5.0 **APPENDIX I: PROJECT CONTRACTS**

In accordance with Section 3.6, you must review the contracts contained in Appendix 1 and comment on any unacceptable terms or conditions. Your compliance in this regard is **mandatory**.

6.0 **APPENDIX 2: PRICING CHART FOR PROPOSED SOLUTION**

Your completion of Appendix 2 is **mandatory**.

7.0 **APPENDIX 3: SUPPLIER WORKSHEET**

Your completion of the Supplier Worksheet is **mandatory**.

[FOR SOFTWARE PURCHASES ONLY]

[BUYER SHOULD PREPARE A LIST OF QUESTIONS FOR SUPPLIERS THAT ALLOWS SUPPLIERS TO "SELF-GRADE" THE CURRENT

FUNCTIONALITY OF THEIR BASE SOFTWARE AND ITS CURRENT CONFIGURABILITY, COMPATIBILITY, INTEROPERABILITY AND STATE OF INTEGRATION WITH OTHER APPLICATIONS AND SYSTEMS. REFERENCE SECTION 2, SPECIFICATIONS AND REQUIREMENTS.]

8.0 **APPENDIX 4: OTHER ADDENDA (SUPPLIER DISCRETION)**

In your discretion, you may attach to Appendix 4 additional information and documentation (e.g., work flow charts, schematics, etc.) that might assist our qualification review process. Your preparation of Appendix 4 is **not** mandatory.

APPENDIX 1

PROJECT CONTRACTS

CLIENT MUST ATTACH APPROPRIATE CONTRACTS:

- PROPOSED SOFTWARE LICENSE AGREEMENT (OBJECT CODE OR SOURCE CODE)
- PROPOSED CONSULTING SERVICES AGREEMENT
- PROPOSED PROFESSIONAL SERVICES AGREEMENT

APPENDIX 2
PRICING CHART

RATE STRUCTURE:

Detail available options

HARDWARE NEEDS:

Detail equipment needs and prices

UPGRADES:

Pricing on upgrades

MAINTENANCE FEES:

Costs and available options

TRAINING COSTS:

SUPPORT:

Detail various levels and prices

CONSULTANTS:

Hourly rates

If another sheet is necessary to provide more details, use the same format.

APPENDIX 3
SUPPLIER WORKSHEET

[SOFTWARE ONLY]

[BUYER SHOULD PREPARE A LIST OF QUESTIONS FOR SUPPLIERS THAT WILL ALLOW SUPPLIERS TO “SELF-GRADE” THE CURRENT FUNCTIONALITY OF THEIR BASE SOFTWARE AND ITS CURRENT CONFIGURABILITY, COMPATIBILITY, INTEROPERABILITY AND STATE OF INTEGRATION WITH OTHER APPLICATIONS AND SYSTEMS. REFERENCE SECTION 2, SPECIFICATIONS AND REQUIREMENTS.]

If another sheet is necessary to provide more details, use the same format.

APPENDIX 4

OPTIONAL SUPPLIER INFORMATION

In your discretion, you may attach to this Appendix 4 additional information and documentation (e.g., work flow charts, schematics, etc.) that might assist our Supplier qualification review process.