

Sample Request for Proposal

[NPower Oregon](#) provides the following document to clients as a starting point for building a new Request for Proposal (RFP). Please note that the project described here is for example only and should not be reused verbatim. For more information on how to build an effect RFP, please see TechSoup's RFP Library at: <http://www.techsoup.org/emcf/rfp>

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Temp Organization

REQUEST FOR PROPOSALS

Name of Project:

Network Assessment and Upgrade

Contract Person: XXXXXXXXXX

PHONE: (503) xxx-xxxx

FAX: (503) xxx-xxxx

E-MAIL: xxxxxx@temporg.org

RFP ISSUE DATE: October 12, 2004

PROPOSAL DUE DATE: November 12, 2004, 4:30 p.m. (PST).

LATE OR FAXED PROPOSALS WILL NOT BE ACCEPTED

SUBMITTAL LOCATION:

Temp Organization
Attn: Nancy Smith, Director of Finance
123 SE 456th Ave.
Anytown, XY 98765

Purpose: Temp Organization is seeking a person or firm to:

- 1) Maintain our current computer system
- 2) Design a new system to meet our needs at an affordable price
- 3) Provide specifics to assist us obtain the funds for the new system
- 4) Install the upgraded system into two new locations
- 5) Maintain the upgraded system on an ongoing basis

Dated Procurement Timetable
(Temp Organization reserves the right to modify the timetable at its absolute sole discretion.)

EVENTS

Issue the Request For Proposals (RFP)	10/12/04
Due Date for Questions regarding the RFP	10/22/04
Responses to written questions provided	10/29/04
Proposals due to Temp Organization	11/12/04
Completion of decision making and Reference Checking	11/22/04
Announcement of Final Selection of the Vendor	11/23/04
Contract Begins	12/01/04
Begin ongoing maintenance of Temp Organization computer systems	12/01/04
Completion of Initial Design of WAN	1/10/05
Completion of Final Design of WAN	1/20/05
Temp Organization completes proposals for funding for the new system	1/27/05
Begin planing for implementation of the new system	3/21/05
New funding obtained	4/29/05
Order/Purchase components of new system	5/02/05
Install new system into first new location	6/01/05
Install new system into second location	6/20/05
Remove remainder of existing system from two of the Three current locations	6/28/05

*Note --The ability of Temp Organization to obtain the necessary funding for this project will determine the timeframe of the following activities:

- Order/purchase of components of new system
- Hardware Delivery and Installation
- Acceptance Testing
- Training
- Project Completion

SCOPE OF WORK

Temp Organization is seeking proposals from individuals or companies to provide:

- (1) Ongoing maintenance of our current system
- (2) Analysis of the technology needs of Temp Organization
- (3) Assessment of necessary upgrades to existing systems and improvements to create a well functioning, reliable infrastructure
- (4) Design of new system/WAN to meet our technology needs at an affordable price; Determine upgrades and/or replacement of existing workstations and servers; Recommend software
- (5) Provide specifics on the proposed new WAN for the grant writing which Temp Organization will do to fund the new system
- (6) Plan the implementation of the new system including conversion to it and the training of Temp Organization staff on it
- (7) Purchase/Install of new system into two new locations and one existing location--- and removal of current system from existing location
- (8) Provide written documentation on the new system
- (9) User training in the operation of the system day-to-day operations.

Temp Organization will employ the improved infrastructure to more effectively support the programs offered through our locations. In order to meet that goal, the technology infrastructure will need to be sound, stable and well maintained. The technology infrastructure shall include hardware, software and other equipment and/or wiring that would be a part of the recommended plan for Temp Organization.

Temp Organization requires a Contractor with demonstrated dedication to responding to industry standards and innovation, and demonstrated reliability in customer support and training.

Temp Organization reserves the right to amend the contract resulting from this RFP for necessary time constraints and the availability of approved funding.

Temp Organization and the Contractor will agree upon a contract payment schedule based on successful implementation of the stated objectives. Temp Organization and the selected Contractor may negotiate the final description of work tasks and deliverables within the scope of what is advertised here, for inclusion in the resulting contract.

The contract established with the person or company selected as a result of this RFP will provide for purchase of all needed hardware, wiring, software licenses, software maintenance, and other services as proposed.

In this RFP, the term Contractor refers to the person or company that is awarded this contract for services. The term "Proposer" refers to an individual or company that is developing a Proposal in response to this RFP.

Other Information

There is an Agency web site at <http://www.temporg.org>. This informational web site provides information about the Agency, its programs, services, and staffing.

In May/June 2005, Temp Organization will be relocating two of its three existing offices. Our goal is to be able to install upgrade infrastructure into both new facilities and network with the third location.

1.0 REQUIRED CONTENTS FOR PROPOSAL, MANDATORY SERVICES AND QUALIFICATION, AND DESIRABLE SERVICES

1.1 REQUIRED CONTENTS FOR PROPOSALS

Each Proposal must comply with the following criteria. Proposals not meeting ALL criteria will be considered non-responsive and will be rejected.

a. Experience of Key Personnel (see Subsection 2.2.f):

Proposer's Key Personnel must have experience within the last 3 years performing services comparable to the requested services. The proposal will demonstrate this requirement is met by listing projects completed by the Key Personnel within the last three years.

b. Format and Page Length Limitation:

The response to this RFP must be organized in accordance with the list of scored criteria in this section. The response must not exceed 9 pages, **excluding** Cover Sheet, Fee Schedule and Pricing Information, and Resumes. A page is defined as: one side of a single 8-1/2" x 11" page, with minimum 12-point font size for the substantive text. Any page over this size will be counted as two pages. Any page or partial page will be counted as one page. Proposers may use their discretion for the font size of other materials (e.g. graphics, charts).

c. Date of Proposal Submission:

The Response to this RFP must be received to the individual and at the address identified in page 1 of this RFP no later than November 12, 2004, 4:30 PM PST.

d. Original Signature:

At least one copy of the Response to the RFP submitted by a Proposer must bear an original signature of the owner of the company, sole proprietor, or authorized representative.

e. Cover Sheet (Not counted in the page limitation)

The Proposal must include a properly completed and signed Cover Sheet. A sample Cover Sheet with all of the required information is included as Attachment A.

f. Fee Schedule: (Not counted in the page limitation)

The proposal must include a complete fee schedule for the services and all information described herein. (Refer to section 1.3.i for details.)

g. Contractor Support:

Contractor must provide complete and accurate information as to the services, support, and training that will be provided under this contract.

1.2 Mandatory Services and Qualifications

Each Proposal must comply with the following Mandatory Services and Qualifications. Proposals not meeting ALL the Mandatory Services and Qualifications will be considered non-responsive and will be rejected.

a. Ongoing Maintenance of existing system:

Proposer must demonstrate the experience and knowledge necessary to maintain the existing system at Temp Organization. A description of the existing system is shown in Attachment B.

b. Infrastructure Assessment and Procurement:

Proposer's must demonstrate that they have the following experience and qualifications:

- to analyze the infrastructure—including hardware, software, wiring and internet connectivity currently in place; and
- to prepare an assessment for need to upgrade and/or replace equipment and services.

Proposer must have the knowledge to assist in the coordination of procurement of said upgrades/replacements. The assessment and plan must prioritize system security, disaster recovery and stability.

c. Installation:

Proposer must demonstrate that they have the knowledge, experience and capacity to provide the installation services required for hardware, associated software, and Internet connectivity devices.

d. Training:

Proposer must demonstrate that they have the knowledge, experience and capacity to train key users in day-to-day operations of the installed infrastructure.

1.3 Desirable System Features, Scoring Criteria, and Other General Information

Scoring will be based on the following categories. A committee will evaluate, score, and rank proposals based on the criteria provided below. Please note that the maximum number of pages that should be submitted for each criterion is shown as well as the maximum number of points that can be awarded for each criterion. A Cover Page as described in 1.1e is required, but not included in the scoring.

IN EVALUATING THE PROPOSALS THERE WILL BE A TOTAL OF 200 POINTS AVAILABLE

a. Overview (1 page)

10 Points Maximum

The overview should demonstrate the Proposer's overall qualifications to fulfill the requirements of this RFP, including experience in assessing and implementing a technical infrastructure with organizations – preferably non-profit specific experience.

b. Implementation Approach (2 pages) **40 Points Maximum**

Describe the approach to be taken on this project. Provide the steps and actions you will take to accomplish the project described in this RFP. Provide a proposed schedule for delivery of the major task milestones and indicate management approach to be used when addressing key issues of the project. Proposers should describe the methodology to be used to assess, procure and implement the technology infrastructure providing an implementation timeline. This timeline need not include specific implementation dates, but should include the time required for each phase of implementation beginning with completion of contract negotiations. Proposals should also include a description of the resources of both the Proposer and Temp Organization Staff required in order to ensure a successful implementation.

c. Hardware, Software, and Network Specifications (1 page)

10 Points Maximum

Proposers should provide the minimum requirements and specifications for all hardware and software that is recommended as a baseline for the assessment and procurement phases of this project. Specify network, connectivity, and telecommunications requirements

d. Hardware, Software, and Network Performance Standards (1 page)

10 Points Maximum

Describe what, in the Proposers' experience, would constitute satisfactory performance and reliability criteria to expect from the proposed solution (i.e. hardware reliability, connectivity bandwidth, hardware life expectancy, etc.)

e. Key Personnel Qualifications (excluded from page limit)

20 Points Maximum

Identify Key Personnel and provide their qualifications and experience related to the requested services. Response should address the following:

- ◆ *Names of Key Person(s) who will be performing the work and their responsibilities;*
- ◆ *Extent of Key Person(s) involvement on this project;*
- ◆ *Names of other person(s) who will have substantial involvement with the project;*
- ◆ *Qualifications including a resume and relevant individual experience for all personnel;*
- ◆ *Short description of experience on similar or related projects.*

Proposers should provide the professional credentials and experience of the managing, supervisory or senior personnel proposed for this contract. Proposers should provide information that demonstrates experience with conducting similar implementation efforts.

f. System Administration Requirements (1 page) 10 Points Maximum

Proposers should describe the experience, knowledge and/or skills set needed by the local System Administrator for the technology infrastructure. Proposals should also include the job duties or tasks to be completed by the Agency's System Administrator as well as the estimated number of hours required to complete the job duties. The number-of-hours required-during implementation should be detailed separately from the number of ongoing hours required (after implementation).

g. Customer References (1 page) 10 Points Maximum

The "Proposer" must provide a complete listing of for-profit and non-profit organization customers with a similar size to that of Temp Organization, including contact names, addresses, and telephone numbers, which the "Proposer" and subcontractor(s) have performed similar work for within the last five (5) years. Four (4) of these customers should be highlighted as references regarding any implementation efforts in which the key personnel proposed to implement this project have been assigned.

Additionally, three (3) business references must be provided including the proposer's and any subcontractor's lead financial institution, accounting firm, and at least one (1) of its current major suppliers. All business references must include contact names, addresses, and telephone numbers.

References should be given that can address assessment, procurement coordination installation, implementation, customer service, support and training

The "Proposer" and any subcontractor(s) must state if he/she has been sanctioned, suspended or debarred by any authorities or oversight entities within the last ten (10) years and the reason for the sanction, suspension or debarment.

h. Security (2 pages) 10 Points Maximum

Proposers should describe how their recommendations affect security, privacy, confidentiality, HIPAA, and Domestic Violence issues and concerns.

i. Training and Support (1 page) 40 Points Maximum

Proposers should describe their approach to training, support, and service and provide a menu of related options.

j. Fee Schedule and Pricing Information (excluded from page limitation)

40 Points Maximum

Proposers must provide a comprehensive cost proposal that includes:

- 1) Cost of maintaining the current system at Temp Organization*
- 2) Cost of analysis and assessment of the current system*
- 3) Cost of system design and planning for implementation of the new system*

- 4) *Cost of providing specific information for computer technology grant writing*
- 5) *Cost of procurement, installation, implementation, and coordination of the new system for Temp Organization*
- 6) *Cost of providing the documentation for the new system*
- 7) *Cost of training and ongoing support for the new system*
- 8) *Cost of ongoing maintenance of the new system---including responding the systems problems, annual maintenance and upgrade costs.*

Please provide a menu of services and prices.

Temp Organization will select a Contractor based on being able to pick and choose from the pricing and series alternatives as proposed.

Temp Organization reserves the right to negotiate services and prices.

Attachment A: Cover Sheet

Proposer's name: _____
Address: _____
Telephone number: _____
Name and telephone number of the contact person for this proposal: _____
Email: _____
Federal ID # or SS #: _____

The undersigned agrees and certifies that:

- 1) he/she has read and understands all of the instructions, specifications, terms, and conditions contained in the RFP;
- 2) he/she is the Proposer or an authorized representative of the Proposer;
- 3) he/she is empowered to bind the Proposer to the terms of the proposal;
- 4) the information provided in the proposal is true and accurate;
- 5) he/she is bound by and will comply with all requirements, specifications, terms, and conditions of this RFP;
- 6) he/she will furnish, or cause to be furnished, all of the services specified in the RFP in accordance with the Proposal and the subsequent Contract; and
- 7) he/she is submitting the enclosed proposal for consideration by Temp Organization.

Authorized Signature: _____
The Proposer or an authorized representative of the Proposer must sign this Cover Sheet

Printed Name: _____

Title: _____

Date: _____

Attachment B: Description of the Existing Infrastructure at Temp Organization (10/1/04)

This is still needed

Existing Software:

Ms Office 97 Suite / Internet Explorer / Outlook Express / MIP Accounting / ADP / Publisher / Raisers edge 7.0 / Ms Office 2000 / Outlook 2003

Existing Hardware:

<i>Item</i>	<i>Quantity</i>	<i>May need replacement or upgrade</i>
Servers (Win 2K Server, SP4)	3	1
Workstations (Win 2K, Win 2K Pro, Win 98, Win 98SE)	53	33
Printers	12	??
Print Servers	5	??

Network Printing: 3 ethernet printservers

Network Connectivity:

Hub 10MB network infrastructure configured with one 60-port back bone 10MB hub, and 3 - 8port hub uplinks; one ethernet coax repeater

WAN and Internet Connectivity:

Offices are currently connected by VPN tunnel and have DSL web connectivity