.

Request for Quotation

$companyname$

$streetaddress$

Mohali, Punjab, 454344

12 August 2014

$authors$

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# Executive summary

## Key Objectives

$keyobjectives$

## Project Scope

The full project scope contains functional areas and features within each of these functional areas. Each of the features can present operational improvements, or benefits to stakeholders. A breakdown of these [features and functions is provided below](#_Scope:_Features_and).

In total there are 93 desired features, broken into $FA\_Count$ Functional areas or groups.

## Timeline & milestones

The project duration is expected to be **18** days.

* The intended start date is:
* The target completion date is:

The project will include key milestones, these will help us monitor and keep the project on time and budget. The milestones are not finalised, but are likely to include:

|  |  |
| --- | --- |
| Milestone name | Date |
| One: Supplier engaged | $supplier\_engaged$ |
| Two: Scoping and planning complete | $scope\_planning$ |
| Three: Interface design complete | $interface\_design$ |
| Four: Development complete | $dev\_complete$ |
| Five: User testing complete | $user\_testing$ |
| Six: training complete and system live | $training\_complete$ |

# About $companyname$

$org\_background$

# Project objectives and benefits

## Introduction

This section presents the motivations for the project. These include project our objectives, how these fit with our organisational strategy and other benefits.

## Objectives

$keyobjectives$

## Fit with organisational goals

$org\_goal\_state$

# Roles and Responsibilities

Successful execution of the project will require the input and participation of a number of team members, these are listed below along with their anticipated roles and responsibilities.

## Project team

The project team leader is Vivek Mahajan.

|  |  |
| --- | --- |
| Team member | Role (title) |
| Vivek Mahajan | $T\_ Lead \_Role$ |
| $T\_Mem1\_Name$ | $T\_Mem1\_role$ |
| $T\_Mem2\_Name$ | $T\_Mem2\_role$ |
| $T\_Mem3\_Name$ | $T\_Mem3\_role$ |

# Process and timelines

We are expecting the project to be delivered during the following period, the project is broken into key milestones shown:

## Timeline & milestones

The project duration is expected to be **18** days.

* The intended start date is:
* The target completion date is:

The project will include key milestones, these will help us monitor and keep the project on time and budget. The milestones are not finalised, but are likely to include:

|  |  |
| --- | --- |
| Milestone name | Date |
| One: Supplier engaged | $supplier\_engaged$ |
| Two: Scoping and planning complete | $scope\_planning$ |
| Three: Interface design complete | $interface\_design$ |
| Four: Development complete | $dev\_complete$ |
| Five: User testing complete | $user\_testing$ |
| Six: training complete and system live | $training\_complete$ |

# Evaluation criteria

Your response will be evaluated on the following criteria in priority order:

1. $Eval\_P1$ - $Eval\_P1\_Weight$
2. $Eval\_P2$ - $Eval\_P2\_Weight$
3. $Eval\_P3$ - $Eval\_P3\_Weight$
4. $Eval\_P4$ - $Eval\_P4\_Weight$
5. $Eval\_P5$ - $Eval\_P5\_Weight$
6. $Eval\_P6$ - $Eval\_P6\_Weight$
7. $Eval\_P7$ - $Eval\_P7\_Weight$
8. $Eval\_P8$ - $Eval\_P8\_Weight$
9. $Eval\_P9$ - $Eval\_P9\_Weight$
10. $Eval\_P10$ - $Eval\_P10\_Weight$

We are following a fair and transparent engagement process, supported by well structured documentation. Please follow this process and do not modify the format of the documentation.

We will not be releasing our individual assessments for each response, however we will be sticking to the assessment mechanism.

# Scope: Features and functions

## Functional areas

This project will see the delivery of 93 features, broken into 8 groups or functional areas. The functional areas are:

**Contact Database**  
  
In almost all membership system builds, whether on or off line, the contact database is a central feature. It is mandatory to the implementation of a working membership system.  
  
 Your contact database records information on all of your constituency, independent of their relationship to your organisation. These attributes (for example, subscriber, current member, committee member) all refer back to the central contact database.  
  
 A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.  
  
 Contact database features include:  
 - Adding new contact details  
 - Managing and editing contacts and status  
 - Manage access and user permissions **Membership management**  
  
Members are the lifeblood of the organisation, delivering services to them and enhancing their lives is a key priority. Membership Management is therefore an essential function for Associations and many other other non-profits groups.  
  
 The level of functionality required to support the management of your membership data and membership interactions will vary with the complexity of your membership structures and the overall level of automation and interaction you require.  
  
 Closely tracking and growing membership numbers is often a primary goal and key revenue generator, so storing and (quickly and flexibly) accessing information on them is essential.  
  
 Key Membership Management features include:  
 - Membership cycles can be defined (calendar year, pro-rater etc)  
 - Membership levels and pricing can be configured  
 - Membership reporting tools **Membership renewal**  
  
Allowing members to renew through your website in a simple and intuitive way will also create significant cost savings.  
  
 It also represents improved service and convenience to many who are happy using the internet to make payments. It allows members to renew any hour of the day or night from anywhere. This convenience can be the difference between the renewal and a lapsed member.   
  
 Key features include:  
 - Automated notifications of membership expiry  
 - Members can modify their membership types, interests and settings  
 - Online payments processed for renewals **Member Services/benefits**  
  
Providing the ability for members to self serve, can represent significant savings to your organisation as well as an improved service. It can also encourage quicker renewals and processing and an increased number of renewals and new members.   
  
 Being able to cost effectively provide members with additional online services and membership benefits and being able to provide different levels of services to different membership levels can increase the attractiveness of your offerings, enable you to upsell your memberships and encourage members to continue to maintain their membership.   
  
 Key features include:  
  
 - Members can update there own details at any time  
 - Different levels of memberships can have access to different information/services  
 - Non-members (contacts or lapsed members) can also update details **Events Registration**  
  
The management of events is a common activity and therefore requirement for Associations and non-profit systems. Its automation often represents dramatic savings because of the high level of manual processing required for each ticket and attendee for every event.   
  
 A list of functional line items relating to Event Registration are provided below for you to include or exclude and to provide a ranking of importance for your project.  
  
 Key features include:  
  
 - Events can be quickly and easily published onto the website  
 - Members receive different event pricing to non-members  
 - Registrants can purchase tickets to all events in a suite of events or purchase in groups **Event Administration**  
  
The 'back-office' activities required when running an event can be extensive and time consuming. Many however can be automated to some extent, which represents a significant saving of time and money.   
  
 Key features include:  
  
 - Seating allocation can be done automatically but with manual override as required  
 - Name tags can be automatically generated for event  
 - Follow up emails can be sent to both attendees and non-attendees after event **Continuing Professional Development**  
  
Many Associations focus on assisting in improve industry standards by providing, monitoring and rewarding members for undertaking ongoing professional development activities.   
  
 The steps and actions required to be taken by members in this process vary between industries, but many are based on points systems that require tracking. A list of functional line items are provided below for you to include or exclude and to provide a ranking of importance for your project.  
  
 Key features include:  
  
 - CPD goals and points can be set-up flexibility in the system  
 - Members can be prevented from renewing their membership if CPD goal(s) have not been met  
 - Members can track and manage their own CPD record e.g. to add external activities that qualify for CPD recognition **Resource Library**  
  
Many membership organisations have accumulated a considerable library of resources that need to be readily accessible to either to the public or, more often, available only to members as a benefit of membership.   
  
 The usefulness of this library is predicated on it being easily browsed or filtered via a variety of meta data relevant to the resources and their application.   
  
 Key features include:  
  
 - Resources within the resource library can be publicly available or restricted to members  
 - Metadata to be assigned to resources can be configured  
 - The resource library can be browsed by category or search/filtered by metadata

$FA1\_title$

$FA2\_title$

$FAN\_title$

## $FA1\_title$

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Feature name | Importance | Fully complies  (to be removed) | Partly complies  (to be removed) | Work around required  (to be removed) | Does not comply  (to be removed) |
| $FE1$ | $FE1\_Importance$ | (to be removed) | (to be removed) | (to be removed) | (to be removed) |
| $FE2$ | $FE2\_Importance$ | (to be removed) | (to be removed) | (to be removed) | (to be removed) |
| $FE3$ | $FE3\_Importance$ | (to be removed) | (to be removed) | (to be removed) | (to be removed) |
| $FEN$ | $FEN\_Importance$ | (to be removed) | (to be removed) | (to be removed) | (to be removed) |

# Submitting your response

Thank you for taking the time to review our Request for Quotation.

We have provided an associated Request for Quotation response document, which contains a structured format for your response.

You will be asked to provide further background and supporting information about your company and services, as well as how your system matches our functional requirements.

Our cut off date for responses is: $RFQ\_reponse\_date$

Once these responses are submitted we will

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