Request for Quotation

**Acme Scentific International**

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08 September 2014

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# Executive summary

## About this document

This document has been created to brief you and your organisation on our upcoming project and to gather detailed information on how your organisation and technology platform can deliver our requirements.

The document contains background information about a, our mission and the project objectives. It also details the functionality that we wish the project and platform to support.

## 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 11 Functional areas or groups.

In this project we wish to implement the following high level functional areas:

* 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
* Marketing Communications  
    
  Moving your communications from the traditional posting of letters also represents significant savings and flexibility. Many organisations are in-fact being pushed by there members and constituents to stop sending letters, in preference to email.   
    
   Whilst for many the transition from letters to email can take some time, even moving 50% of your communications will save money and benefit the environment. 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:  
   - Newsletters (as well as notifications to individuals) can be sent from the system  
   - Subsets of database can be chosen based on a range of profile information and/or custom segments  
   - Statistics are available to allow analysis of success of communication
* Member Directory  
    
  In some cases the publication of certain membership details back to the website is necessary. This often occurs amongst networking groups or where members are organisations and the organisational details are being published.   
    
   These directories or lists can be published publicly or log in only areas. 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:  
    
   - Members receive directory listings as part of their membership benefits  
   - Details to be included in the directory can be configured  
   - The member directory can be filtered by a range of custom options
* 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
* Website Content Management  
    
  Websites are a critical channel of communication for Associations. To keep a website up to date, fresh, relevant and attractive to search engines the content on the site should be modified and updated regularly. It is therefore essential that this task can be easily and quickly managed by non-technical personnel.   
    
   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:  
    
   - All site content can be managed by non-technical administrators  
   - Menu structures and Information Architectures (site maps) can managed  
   - Content approval workflow is supported
* 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

## Project Timeline

The project duration is expected to be **8** days.

* The intended start date is: **02 September 2014**
* The target completion date is: **10 September 2014**

# About a

## Our mission

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## Our short / medium term goals

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# 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.

## The projects contribution to our organisations mission

To free from buugs.

## The projects contribution to our organisations current goals

to check

# 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.

## Our project team

The project team leader is at.

|  |  |
| --- | --- |
| Team member | Role (title) |
| at | dfe |
| b9 | dfe |

# 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 **8** days.

* The intended start date is: **02 September 2014**
* The target completion date is: **10 September 2014**

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 |
| 1: Project Commencement | 02 September 2014 |
| 2: i | 09 September 2014 |
| 3: Project Completion | 10 September 2014 |

# Evaluation criteria

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

|  |  |
| --- | --- |
| Evaluation criteria | Weight |
| 2: Match to functional requirements | 10 |
| 3: Value for money | 10 |
| 4: Organisational fit | 10 |
| 5: Team (technical & relationship) | 10 |
| 6: Strength of project process | 10 |
| 7: References (track record) | 10 |
| 8: Referees (your current clients) | 10 |
| 9: Locations and logistics | 10 |
| 10: Warrantees (products & services) | 10 |
| 11: Company history and stability | 10 |

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 11 groups or functional areas. The functional areas are:

## $FA\_title$

$FA\_Desc$

## Features details

|  |  |  |
| --- | --- | --- |
| Feature name | Importance | Notes |
| $FA\_Fnlineitems$ | $FA\_lineitemsimp$ | $FA\_Notes$ |

$other\_FA\_features$

# 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.

In the RFQ response we also ask you 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 assess them on their merits and contact vendors with further any questions, or the outcome of our decision.