Request for Quotation

**dsfdsfds**

sadsdsa

adsadsad

dsadsads, sadsadsad, sdsadsad

22 September 2014

Vivek Mahajan

Table of Contents

Executive summary

Key Objectives

Project Scope

Timeline & milestones

About dsfdsfds

Project objectives and benefits

Introduction

Objectives

Fit with organisational goals

Roles and Responsibilities

Project team

Process and timelines

Timeline & milestones

Evaluation criteria

Scope: Features and functions

Functional areas

Features by Functional area

Submitting your response

# 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 sadsdsa, 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 2 Functional areas or groups.

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

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 Application  
  
Automation of membership processes, and providing the ability for members to self serve, can represent a significant saving (operational efficiency) to your organisation at the same time as providing improved (self) service.  
  
 Online membership application and membership processing can also encourage quicker renewals and an increase the overall number of renewals and new member applications. A list of functional line items relating to Membership Application are provided below for you to include or exclude.   
  
 Key Membership Application features are:  
 - Individuals / corporations can apply for membership via the public website  
 - Members can choose applicable options and levels  
 - Communications and payments are handeled by the system

## Project Timeline

The project duration is expected to be **10** days.

* The intended start date is: **18 September 2014**
* The target completion date is: **28 September 2014**

# About sadsdsa

## Our mission

sadsadsads

## Our short / medium term goals

adsadsa

# 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

ds

## The projects contribution to our organisations current goals

dfdsfdsf

# 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 sdsads.

|  |  |
| --- | --- |
| Team member | Role (title) |
| sdsads | xx |
| asdsadsa | ssa |

# 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 **10** days.

* The intended start date is: **18 September 2014**
* The target completion date is: **28 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 | 18 September 2014 |
| 2: Supplier engaged | 20 September 2014 |
| 3: Scoping and planning complete | 21 September 2014 |
| 4: Interface design complete | 23 September 2014 |
| 5: Development complete | 25 September 2014 |
| 6: User testing complete | 26 September 2014 |
| 7: Training complete and system live | 27 September 2014 |
| 8: Project Completion | 28 September 2014 |

# Evaluation criteria

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

|  |  |
| --- | --- |
| Evaluation criteria | Weight |
| Match to functional requirements | 10 |
| Value for money | 10 |
| Organisational fit | 10 |
| Team (technical & relationship) | 10 |
| Strength of project process | 10 |
| References (track record) | 10 |
| Referees (your current clients) | 10 |
| Locations and logistics | 10 |
| Warrantees (products & services) | 10 |
| 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 2 groups or functional areas. The functional areas are:

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  
  
Features details

|  |  |  |
| --- | --- | --- |
| Feature name | Importance | Notes |
| Membership pricing can be configured including early bird discounts, joining fee, late fee | Important |  |

Membership Application  
  
Automation of membership processes, and providing the ability for members to self serve, can represent a significant saving (operational efficiency) to your organisation at the same time as providing improved (self) service.  
  
 Online membership application and membership processing can also encourage quicker renewals and an increase the overall number of renewals and new member applications. A list of functional line items relating to Membership Application are provided below for you to include or exclude.   
  
 Key Membership Application features are:  
 - Individuals / corporations can apply for membership via the public website  
 - Members can choose applicable options and levels  
 - Communications and payments are handeled by the system  
  
Features details

|  |  |  |
| --- | --- | --- |
| Feature name | Importance | Notes |
| Members can elect to include optional extras to their application e.g. sign up for Special Interest Groups | Important |  |

# 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.