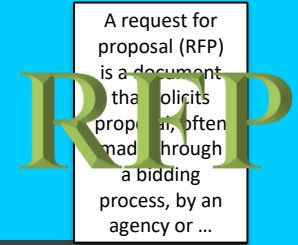


RFP

A request for proposal (RFP) is a document that solicits proposals, often made through a bidding process, by an agency or ...

Request For Proposal





AGENDA

1. What is an RFP?
2. Why an RFP?
3. Do you need an RFI?
4. Mapping out the “Is” vs. the “Should”
5. Getting Started / Research
6. Writing the RFP
7. Examples
8. Receiving / Analyzing the Proposals

What is an RFP?

- A Reqest For Proposal
- *A request for proposal (RFP) is a solicitation made, often through a bidding process, **by an agency or company interested in procurement of a commodity or service, to potential suppliers** to submit business proposals.*
- *“A clearly written and properly organized RFP is a document that **establishes technical goals**, communicates **administrative and financial expectations**, and sets the tone for good communication and a productive relationship between the buyer and supplier.”*

Why an RFP?

- ✧ “An RFP represents a significant opportunity for suppliers to sell their products, systems, or services.”
- ✧ “It provides **a stable set of specifications** and requirements for suppliers to work from.”
- ✧ “It provides a platform for describing and promoting products.”
- ✧ **“It demonstrates a buyer’s commitment to the project and that funding is available.”**
- ✧ “An RFP is an invitation for suppliers, through a bidding process, to bid on a specific product or service...”
- ✧ A chance for the “seller” to sell to you (be specific!)

Before you begin...

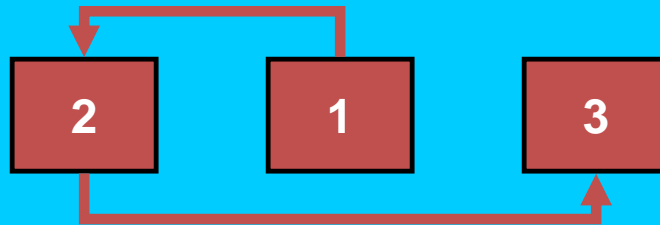
✧ ...think about the end.

- ➔ Create a “wish list”
- ➔ What would your desired proposal include?
- ➔ Do you need an RFI (Request for Information)?

Getting Started: If upgrading an existing system



- ✧ 1. Flow chart your existing process



- ✧ 2. Identify disconnects
- ✧ 3. Flow chart your desired process



Getting Started *(cont'd)*

- Do Your Research!
- Solicit Feedback
- Establish a Budget & Timeframe
- Get Institution Buy-In
- Be Prepared
- Notification

Writing the RFP

- ✓ Organize your questions
- ✓ Decide on a format
- ✓ Determine the distribution
- ✓ Write the RFP
- ✓ Send it out
- ✓ Wait for the proposals.....

Goals:

Minimize time, money, and uncertainty.

Maximize consistency.

Don't end up in a legal battle.

Typical School RFP Format:

- I. Overview of the RFP Process
- II. Background Discussion and Goals of the University
- III. Scope of Services
- IV. Basis of Selection
- V. Contents of the Proposal
 - A. Brief History of Firm
 - B. Implementation Schedule
 - C. ...
- VI. Information about the RFP
 - A. Procurement Schedule
 - B. Issuance of RFP and Questions
 - C. ...
- VII. Appendices



Receiving the Proposals

- ☐ Analyze the Proposals
- ☐ Team Effort or Solo?
- ☐ “Grading” the Proposals

► ► **Sheet1** Sheet2 Sheet4 Sheet3 Sheet5

► ► Sheet1 **Sheet2** Sheet4 Sheet3 Sheet5

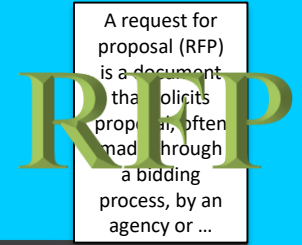
A2 f_x

A	B	C	D	E	F	G	H	I	J	K
		Evaluation of Respondents' Proposals								
		Category	Importance	Rating (1-5)						
				Company A		Company B		Company C		
	1	Loan Programs	5%		0%		0%		0%	
	2	Origination Processing	8%		0%		0%		0%	
	3	Disbursement Processing	5%		0%		0%		0%	
	4	Online Services	12%		0%		0%		0%	
	5	Borrower Benefits	15%		0%		0%		0%	
	6	Customer Service	15%		0%		0%		0%	
	7	Collateral Materials	5%		0%		0%		0%	
	8	Default Prevention	15%		0%		0%		0%	
	9	Technology	10%		0%		0%		0%	
	10	References	10%		0%		0%		0%	
		GRADE	100%		0%		0%		0%	

N I N

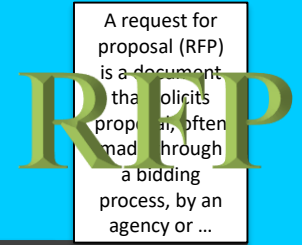
► Sheet1 / Sheet2 / Sheet4 / **Sheet3** / Sheet5 /

Finally...



Notify all Respondents!

For this class



- ✧ The company that hires you will write the RFP. Until the SA demo, you are the hiring company.
- ✧ Follow the format of the RFP available on BlackBoard.
- ✧ Some criteria for your RFP are on the next few slides.

Group Project: How to submit proposals.

A request for proposal (RFP) is a document that solicits proposals, often made through a bidding process, by an agency or ...

RFP

- ✧ Be sure you say how to submit proposals. **CLEARLY.**
- ✧ What you want the proposal to contain (i.e. price, resumes of **the people who will be working on the project**, etc.)
- ✧ Methods of submitting proposals (fax, e-mail, etc.).
- ✧ **Clear dates (including time of day) for proposals and when a decision will be made.**
- ✧ Clearly define how the winners and others will be notified.
- ✧ **Contact information for questions** and notifications that **all questions and answers will be made available to all contractors.**

Group Project: What you want.

A request for proposal (RFP) is a document that solicits proposals, often made through a bidding process, by an agency or ...

RFP

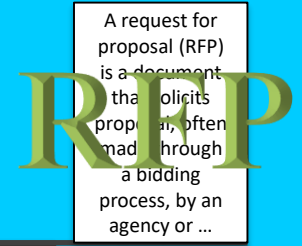
- ✧ Be sure you ask for what you want. CLEARLY.
- ✧ Clear about Goals.
- ✧ Clear about deliverables. Include Dates.
- ✧ Include details about accuracy, speed or anything that is relevant.

Think of this as a legal contract. You will make a contract after this, but **if you change any of the details, that will change the price and you might end up in a legal battle with the contractors who were not chosen if you do.**

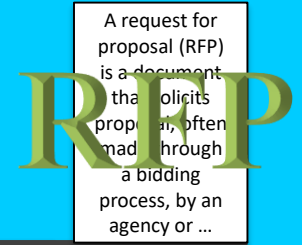
Group Project: How you will choose.

- ✧ State the criteria by which you will score the bids and choose a winner. **CLEARLY.**
 - Price.
 - Company Reputation.
 - Experience doing a **job of equivalent size** in this field.
 - **Resumes of people** who will be working on this project.
 - **Local business bonus.**

Group Project

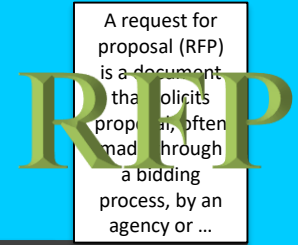


- ✧ Decide on the categories you will use to judge submitted proposals.
- ✧ Assign a weight to each category.
- ✧ Review your RFP. Does it clearly target suppliers of what you are looking for? If not revise it.
- ✧ Append your categories to the RFP for this submission only (Do not put them in a business RFP, but they will be used to mark your RFP)



Excerpts From Requests For Proposal That got a Poor Grade

Table of Contents



- ✧ Problem description
- ✧ Project Objectives
- ✧ Current System(s) – (if any) or similar systems
- ✧ Intended users and their interaction with the system
- ✧ Known interactions with other systems inside/outside the client organization
- ✧ Known constraints to development
- ✧ Project Schedule
- ✧ Glossary of terms

Section Title

✧ Requirements

- Section with room for improvement

Suggestions for improvement

Better written example

1.0 Problem description / opportunity / expression of need

A request for proposal (RFP) is a document that solicits proposals, often made through a bidding process, by an agency or ...

- ✧ What is the need for improvement of the existing system, or the need for the new system?
- ✧ The objective is to clearly define the current system and explain why the system need to be improved.

1.0 Problem description

A request for proposal (RFP) is a document that solicits proposals, often made through a bidding process, by an agency or ...

RFP

✧ Current CSCI375 website needs to be improved due to navigational problems and the lack of detail. At the moment the website's layout is very basic, it **needs more columns and menus**, such as drop down menus in **javascript**, or more condensed columns in **HTML5**. There is no news bar to show the updates, and there is no information about this course, or the instructor.

✧ Navigational problems include the lack of

~~moving back to the root folder, it is not possible~~

This is programming a solution. It should be identifying the problem!

At this point the problem has not even been analyzed so it is totally inappropriate to be choosing the programming language of the solution (JavaScript). The analysis will determine the solution.

Vancouver Island University's Systems Analysis course needs an effective method to track each student's contribution to a group project. The goal of the university is to produce students with excellent skills in each of the program areas, including systems analysis. However, since the group project is worth such a high percentage of the final mark, there might be a perception that a student who does well in this class might simply have been on a skilled team. Any tracking tool must easily reveal which student was responsible for each portion of a project.

Also, to provide maximum effectiveness, the tool must allow the students to interact with the concepts of this course such as Gantt charts, etc.

The tool must also be intuitive and light weight.

The current system uses a text based system that is only accessible to students for the user to input tasks and hours worked on each task. This information is stored in a flat file that is read into a web page that is publically accessible in a read-only format.

Two portions of this system require improvement. First, the system for inputting data into the system is not intuitive and needs an improved user interface.

Second, the read-only portion of this system needs to be expanded to provide PERT charts, reports on single individuals including how many hours the individual has spent on each task, and reports/ automatic e-mails to all people involved in a task that has fallen behind schedule.

2.0 Project Objectives

A request for proposal (RFP) is a document that solicits proposals, often made through a bidding process, by an agency or ...

- ✧ Specify the main objectives in detail. Include rationale as to why each objective is important to your company.

2.0 Project objectives

- ✧ **The first goal efficiency for the student.** They need everything easy for navigation and usage.

We will develop the website to make this website smooth and enjoyable. The second objective is to make the website more beautiful and consistent with the importance of what holds the information. We will support the website with information stating the student. We take care of what the student doing in website.

- ✧ in detail about what the student needs. There are different kinds of ideas such as: ...

A request for proposal (RFP) is a document that solicits proposals, often made through a bidding process, by an agency or ...

RFP

What is the purpose of the web site?

- I can't make it more efficient if I have no idea what it is supposed to DO.

Is it broken, or just need updating?

2.0 Project objectives

1. Style: This is just fluff

a. It is to be consistent, comfortable and easy on the eye.

2. Information: How? Be relevant.

a. It is to be helpful and non-expendable.

3. Development: What does this even mean?

a. It is to be permanently processions of the modern generation. I am picturing a never-ending funeral.

4. Tools: Very vague and not helpful

a. Including services that are not available, such as a back button.

3.0 Current system(s) – if any / similar systems

A request for proposal (RFP) is a document that solicits proposals, often made through a bidding process, by an agency or ...

✧ Current system(s) used by your group (if any). If none, are there any systems that are similar to the one you would like to build?

3.0 Similar systems

<http://www.theoi.com/>

Are you going to just copy theirs's? If so, I could just hire them.

-The THEOI web page looks similar to what I have in mind.
about the CSCI375 web page.

process, by an agency or...

-The home page of THEOI.com uses images to navigate through the web page.

-Instead of Greek Gods and nymphs, **I am hoping** to insert the logo's of different

CSCI375 teams to the home page

This should be design options, not hopes.

-Our team members will interview with the two other teams to add some information about their project to the CSCI375 website, similar to the articles on THEOI.

- The updates and the news menu on the right side of the page is also very close to my overview of the upcoming project.

3.0 Similar systems

-This math page shows all the previous course work of the Vancouver Island

A request for proposal (RFP) is a document that solicits proposals, often made through a bidding process, by an

RFP

Same issues as last paragraph

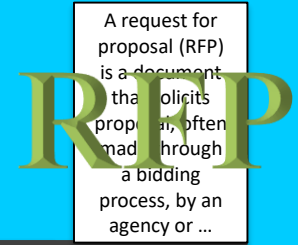
University instructor Glen Pugh

-I am hoping that our team can implement a similar system that will help a future team to add a chronological bar to the website.

-This way the future students can have some idea about the course and the projects.

-Also if we could get the permission, I would like to add the past Csci375 pages, so that users could see this pages change over the years.

3.0 Similar systems



-<https://www.viu.ca/>

- **Vancouver Island University home page, is colorful and beautifully designed.**
- **Our Csci375 web page could use a similar color scheme.**
- I am hoping to upload the photographs of the different teams to the website depending on their permission.
- If we do not get the permission I am hoping to upload the photographs of their workplace

Are you trying to say something like:
Need to engage with artist to develop a theme and log which is consistent with VIU but unique to the CSCI department.

4.0 Intended users and their basic interaction with the system

A request for proposal (RFP) is a document that solicits proposals, often made through a bidding process, by an agency or ...

✧ Users could be in the client (your) organization or outside.

4.0 Intended users and their basic interaction with the system

A request for proposal (RFP) is a document that solicits proposals, often made through a bidding process, by an agency or ...

RFP

- Anyone who wants to take CSCI 375 system analysis.
- The students want to have general idea about how the system analysis group works.
- Also, anyone wants to know the system.
- The users' interaction with the system.
- As a client, it is easy to track or move.
- In the index page, there is 8 links. You can go into any page in the website from these links, so it is very easy to go anywhere.
- There is one issue that there is not link to go back. You have to press the return button if you want to go back or to the index page.

The first two points were OK, but from here on it looks like you forgot what the question was.

5.0 Known interactions with other systems within or outside of the client organization.

✧ List up to three.

5. Known interactions with other systems

A request for proposal (RFP) is a document that solicits proposals, often made through a bidding process, by an agency or ...

RFP

- Anyone who wants to take CSCI 375 system analysis.
- The students want to have general idea about how the system analysis group works.
- Also, anyone wants to know the system of working as group.
- The users' interaction with the system:
 - As a client, it is easy to track or move inside the website.
 - In the index page, there is 8 links. You can go into any page in the website from these links, so it is very easy to go anywhere.
 - There is one issue that there is not link to go back. You have to press the return button if you want to go back or to the index page.

This is section 4.0 copied and pasted.

Remember: I am not counting words.

You make your words count!

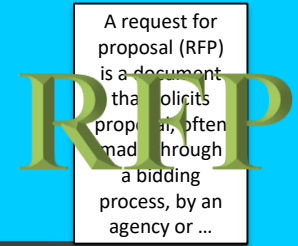
6.0 Known constraints to development

A request for proposal (RFP) is a document that solicits proposals, often made through a bidding process, by an agency or ...

✧ List up to three.

6. Known Constraints to Development

Code implementation: The coding part of this project is to be looked at in an abstract manner. The fact that



not being able to implement some services offered by efficient scripts, such as javascript or jquery, or even a markup language such as HTML5, is a constraint.

Why can't we use them?

Space on Server : As of this stage of development, the size in MB can determine how much we can do to improve this website. For example, if we were to add some pictures and videos of high quality, we would need more space to save them on the website.

Traffic of website : As many of you know, VIU does not offer computer science courses in summer, let alone this particular course CSCI375 which is offered once a year. This creates a problem for this website as to who will be visiting it when it is not used during Summer or Fall semester.

Why does that matter?

Although students are free to use their own personal web space and other resources, all aspects of this course must also be able to be performed solely via the resources provided to students by the university.

1. VIU has made a decision that no students will be provided with publically accessible web space.
2. For security reasons, the professor's web spaces that is publically accessible does not have php or any other server side scripting language. Therefore it is impossible to use the publically accessible web site to store information on the server without either being on site or using a complex system to re-direct the display back to the local host.
3. Bandwidth and server space constraints limit the range of solutions to only light weight options.

7.0 Project Schedule

A request for proposal (RFP) is a document that solicits proposals, often made through a bidding process, by an agency or ...

- ✧ Broad overview. Must agree with the course schedule. Can include some of the potential meeting dates with milestones included.

7.0 Project Schedule

Actually this section was not bad, but needed about twice as much detail.

A request for proposal (RFP) is a document that solicits proposals, often made through

RFP

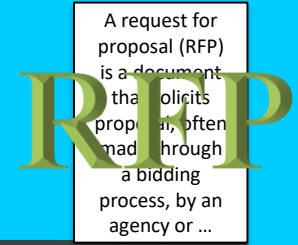
MEETING FOR:	MEETING DATE	WHERE	FINAL DATE
RFP	25 Jan 2015	At the library	27 Jan 2015
PITCH	8 Feb 2015	At the library OR The Lab	12 Feb 2015
MILESTION 1 & Lessons Learned1	1 Mar 2015	At the library OR The lab	5 Mar 2015
Project Demo	29Mar 2015	At the lab OR The Lab	9 Apr 2015
Final project	5 Apr 2015	At the lab OR The Lab	9 Apr 2015

8.0 Glossary of terms

A request for proposal (RFP) is a document that solicits proposals, often made through a bidding process, by an agency or ...

- ✧ Terms that are meaningful to your client group but might not be understood by someone outside your group.

Good Problem Description from a previous CS 383 group requesting a calculus game



- ✧ American students consistently fall behind in math, which is problematic as the demand for STEM majors in the workplace increases. One of the mathematical disciplines in particular, Calculus, is a common prerequisite for STEM fields, yet it is an area many students struggle to understand and successfully apply.
- ✧ Humans seek out, connect to, and learn from stories—something math classes are traditionally devoid of. Currently, no systems exist that present or teach Calculus material (beyond limits) in an engaging or story-based way. Videogames are among the most popular mediums of entertainment, especially among student age groups, but there are currently no offerings that seek to help students specifically with derivatives and integrals. The Packet Loss company is looking for an opportunity to fill this void.

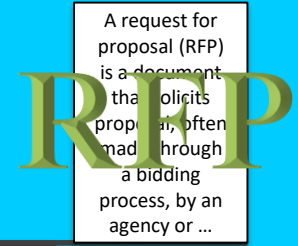
Good Problem description



- ✧ Our company needs an interactive, innovative, and new 2D platformer game that will capture the attention of gamers across the globe. Our goal is to show the industry that our company is a serious competitor capable of creating fun and engaging video games. We believe this is possible with a 2D platformer game. The question we hope to answer: “How does one make an original game that is challenging, thought-provoking, and groundbreaking in a long-stagnant genre?” This platformer must stand out from other games that have been made in the past.
- ✧ The platformer is a very popular genre with historical ties to the classic video games of the 1980s. In modern times, the video game market has become oversaturated with platformer games. Modern platformers are not innovative and often simply reiterate the ideas that made them successful in the past, causing the once popular genre to fall to the wayside.
- ✧ Since most companies have failed to innovate with platformers in the past, we want to show the industry that even a platformer can be an immersive, innovative, and dynamic experience for the player. To facilitate this, we propose a platformer with a huge emphasis on dynamic level/map design and gameplay. This lets the game stand out from the crowd from the start and shows the industry our capabilities and creativity.

Request For Proposal

Brainstorm 2 or 3 games



✧ Use the RFP template:

- Problem description
- Project Objectives
- Current System(s) – if any or similar systems
- Intended users and their interaction with the system
- Known interactions with other systems inside/outside the client organization
- Known constraints to development
- Project Schedule
- Glossary of terms