1 INTRODUCTION

1.1 PURPOSE OF PROJECT CHARTER

The purpose of this project charter is to formally authorize and define the AI-Powered Government RFP Automation System project. It establishes a clear understanding between Vertical Labs and Valorie Rodriguez regarding the project's goals, scope, deliverables, timeline, and investment.

Specifically, this charter outlines the development and deployment of an autonomous AI agent system that continuously monitors government procurement portals, analyzes RFPs, generates compliant proposals, and submits them automatically, beginning with the City of Dallas bottled water delivery contract. The charter serves as a foundational document to guide the initial 30-day setup phase, ensure alignment on expectations, and provide a framework for tracking project success, resource allocation, and risk mitigation.

2 PROJECT OVERVIEW

Who: Vertical Labs will develop and deploy the system for Valorie Rodriguez.
What: A fully autonomous, AI-powered system that identifies, analyzes, generates, and submits proposals for government RFPs, with no manual intervention.
When: The initial setup phase will span 30 days, beginning immediately upon approval.
Where: The system will operate remotely via a cloud-hosted infrastructure, monitoring and interacting with U.S. government procurement portals—including the City of Dallas.

This project will streamline government RFP responses, enabling around-the-clock automation of high-value contract opportunities—starting with the City of Dallas bottled water delivery contract.

3 JUSTIFICATION

3.1 BUSINESS NEED

iByte Enterprises LLC is working to expand into government contracting but is hindered by fragmented processes, a lack of visibility, and excessive manual effort. The current approach to sourcing and responding to Requests for Proposals (RFPs) is time-consuming, error-prone, and not scalable—limiting iByte's ability to compete for high-value public contracts consistently.

Core Operational Challenges:

- Dispersed RFP Discovery: Opportunities are scattered across 20+ procurement websites (listed in **APPENDIX B**), each requiring separate logins, search methods, and navigation—making it difficult to monitor consistently.
- No Centralized Tracking System: iByte Enterprises LLC lacks a unified place to view and manage all open, upcoming, and submitted RFPs. Without a centralized dashboard, deadlines are easily missed, and priorities become unclear.
- No Automated Alerts or Notifications: Without proactive reminders, RFP due dates, pre-bid conferences, and document deadlines are often overlooked—putting submissions at risk.
- Repetitive Manual Data Entry: Company information (e.g., DUNS number, EIN, tax identification, licenses, contact info) must be re-entered for each RFP response, wasting 40–60 hours per proposal cycle and increasing the chance of clerical errors.

- Disorganized Document Management: The use of Dropbox and manual folders has resulted in scattered files, inconsistent naming, outdated versions, and delays in locating key documents (e.g., past proposals, certificates, templates).
- Uncertainty Around Submission Requirements: iByte often lacks early insight into which submission components:
    - Require notarization
    - Require physically mailing in a cashier's check to a municipality
    - Water quality testing certificates
    - Need updated certificates of insurance
    - Take multiple days to complete tasks such as obtaining subcontractor quotes, preparing financial disclosures, or registering with new agencies.
- Short Turnaround Times: With 7–14-day submission windows, any delay in identifying complex requirements can prevent timely submission.
- Limited Team Bandwidth: As a lean organization, iByte Enterprises LLC lacks the resources to manage multiple RFPs simultaneously using manual processes, which limits growth potential and scalability.

Strategic Justification:

- Unlock Growth Potential: Winning just one government contract—like the City of Dallas bottled water delivery agreement—could generate **$500K annually.**
- Reduce Operational Bottlenecks: Automating discovery, tracking, and proposal generation frees up internal resources and eliminates dependency on spreadsheets, shared drives, or memory.
- Mitigate Compliance Risk: A system that flags notarization, insurance requirements, and long-lead-time deliverables early helps avoid last-minute scrambles and disqualified proposals.
- Improve Visibility and Planning: Centralized dashboards and AI-powered insights will give iByte full awareness of submission status, upcoming deadlines, and task duration—enabling proactive planning instead of reactive effort.
- Scale Efficiently: Pursue 10–20 RFPs simultaneously with minimal staff overhead, enabling iByte to achieve aggressive growth without expanding headcount.

4 SCOPE

4.1 OBJECTIVES

Short-Term Objectives (Within Initial 30-Day Setup Phase 1)

1. Deploy a fully autonomous AI system capable of identifying and responding to the City of Dallas's bottled water RFP without human intervention.
2. Submit a complete, compliant proposal for the bottled water delivery contract within 5 days of project kickoff.
3. Eliminate manual monitoring and data entry by integrating AI tools that detect RFPs, analyze requirements, and populate repetitive fields.

4. Ensure full compliance with all submission requirements, including notarized documents and up-to-date insurance certificates, via automated pre-submission checks.
5. Establish a centralized dashboard where all RFP-related documents, deadlines, and submission statuses can be tracked in one place.
6. Prove operational readiness by demonstrating successful, on-time submission and system functionality by the end of the 30-day initial setup phase.
7. Reduce average RFP response time from 40–60 hours down to under 4 hours for initial proposals.

Long-Term Objectives (Post-Deployment and Scaling Phase 2)

1. Enable scalable automation to support the simultaneous pursuit of 10–20 RFPs beyond the initial contract.
2. Establish a reusable proposal template library to streamline future submissions and improve consistency.
3. Integrate AI-driven prioritization to assess RFPs by alignment, profitability, complexity, and probability of win for strategic pursuit.
4. Implement role-based access and permissions for secure collaboration within internal teams and external partners.
5. Create a knowledge base that captures lessons learned, standard compliance requirements, and frequently used content, enabling faster proposal development. Use a single email address to consolidate all data findings, eliminating the need for text messaging, emails, and phone calls.
6. Ensure business continuity by deploying backup systems, failover protocols, and redundant AI agents to guarantee 24/7 operation.
7. Build a compliance tracking module to maintain active records of licenses, insurance certificates, and standard forms with automated alerts for expirations.
8. Prepare the system for expansion into state and federal RFP platforms such as SAM.gov.
9. Position iByte Enterprises LLC as a tech-forward government vendor, enhancing credibility and competitive advantage in the contracting marketplace.

4.2 MAJOR DELIVERABLES

The following table presents the major deliverables that the project's service or result must meet for the project objectives to be satisfied.

Major Deliverables	Deliverable Description
Infrastructure Setup	Provisioning and configuration of cloud-based servers, databases, and hosting environment to support 24/7 AI operations.
AI Platform Integration	Integration and configuration of AI language models (Claude Pro, ChatGPT Pro) and computer vision APIs for

	proposal handling.
Custom AI Model Training	Fine-tuning AI models on government procurement language, compliance, and past proposals to ensure accurate RFP interpretation and proposal generation.
Operator AI Deployment	Development and deployment of AI-driven operator system for automating form completion and submission on government portals lacking APIs.
Centralized Dashboard Development	Creation of a unified interface for monitoring RFP opportunities, tracking submission status, deadlines, and document management.
Automated Proposal Generation System	AI system capable of generating tailored, compliant proposals based on specific RFP requirements and company data.
Compliance Verification Module	Automated checks for document notarization, insurance certificate validation, and other mandatory submission criteria.
First RFP Submission	Successful, fully autonomous submission of the City of Dallas bottled water delivery contract proposal within 5 days.
System Optimization & Testing	Refinement of AI models, workflows, and operator AI for improved speed, accuracy, and reliability across multiple RFPs.
Backup & Failover Mechanisms	Implementation of redundancy and failover protocols to ensure continuous system availability and operation.
User Training & Documentation	Training materials, user guides, and documentation for managing and monitoring the AI system and dashboard tools.
Final Project Report & Handover	Comprehensive project completion report including performance metrics, lessons learned, and recommendations for scaling.
Infrastructure Setup	Provisioning and configuration of cloud-based servers, databases, and hosting environment to support 24/7 AI operations.
AI Platform Integration	Integration and configuration of AI language models (Claude Pro, ChatGPT Pro) and computer vision APIs for proposal handling.
Custom AI Model Training	Fine-tuning AI models on government procurement language, compliance, and past proposals to ensure accurate RFP interpretation and proposal generation.

4.3 BOUNDARIES

[Describe the inclusive and exclusive boundaries of the project. Specifically address items that are out of scope.]

Category	Configuration / Packaging	Details / Notes	Boundary
Single-Serve Bottles	8 oz Bottled Water	Common for schools, events, emergency kits	Excluded

	12 oz Bottled Water	Used for meetings, classrooms	Excluded
	16.9 oz (500 mL) Bottled Water	Most standard in general solicitations	In Scope
	20 oz Bottled Water	Requested for field staff and outdoor workers	Excluded
	Sport-Cap Bottles	For athletic programs, parks departments, or recreation centers	Excluded
	1 Liter Bottles		In Scope
Bulk Water Jugs	1 Gallon Bottled Water	Emergency preparedness and disaster relief	Excluded
	2.5 Gallon Bottled Water (with spout)	Used in camps, shelters, or large gatherings	Excluded
	3 Gallon Jugs	Smaller offices or limited-use facilities	Excluded
	5 Gallon Refillable Jugs	Common for office water coolers and recurring deliveries	Excluded
Water Cooler Options	Hot/Cold Dispensers	Often paired with 5-gallon jugs	Excluded
	Dispenser Service (Rental/Maintenance)	May include delivery, repairs, or replacements	Excluded
Canned Water	12 oz Aluminum Cans	Increasingly requested for sustainability reasons	In Scope
Boxed Water	500 mL or 1 Liter Cartons	Requested by green schools or sustainability-focused agencies	Excluded
Emergency Supplies	Palletized Bottled Water	Typically 48 cases per pallet for disaster response	In Scope
	5+ Year Shelf-Life Bottled Water	Long-term emergency stockpiles	In Scope

5 ASSUMPTIONS, CONSTRAINTS, AND RISKS

5.1 ASSUMPTIONS

This section identifies the statements believed to be true and from which a conclusion was drawn to define this project charter.

1. The necessary government procurement portals will remain accessible and stable during the project, allowing automated AI agents to monitor, analyze, and submit proposals without unexpected downtime or significant interface changes.

2. The AI platforms (Claude Pro, ChatGPT Pro) and third-party APIs (computer vision, hosting services) will perform reliably and integrate smoothly with the custom-trained models and automation framework.

3. iByte Enterprises LLC will provide timely access to all relevant company information, historical proposal data, and required credentials for AI training and system configuration.

4. Government RFP submission requirements and formats will remain consistent enough to allow for AI-based template and compliance automation.

5. Human oversight will be available when necessary, during the initial setup phase to verify AI outputs and intervene if unexpected issues arise.

5.2 CONSTRAINTS

This section identifies any limitations that must be taken into consideration before the initiation of the project.

1. The project must be completed within a 30-day initial setup and deployment timeline**,** limiting the scope of AI training and system refinement possible in this phase.

2. Government procurement portals do not provide APIs**,** requiring the use of computer vision and AI-driven operator systems for navigation and submission, which may be more prone to failures due to interface changes or CAPTCHA challenges.

3. Budget for initial setup is capped at $1,000, which constrains the extent of infrastructure, API subscriptions, and custom development that can be procured upfront.

4. Limited human resources at iByte Enterprises LLC necessitate a highly autonomous system that requires minimal daily human intervention after deployment (90%/10% human).

5. Variability in government RFP requirements (e.g., notarization, insurance updates) creates complexity in automating compliance and may require periodic manual reviews or updates.

5.3 RISKS

Risk	Mitigation
Government portal changes disrupting AI navigation and submissions.	Implement regular monitoring of portal updates; maintain flexible AI operator scripts; have manual override options for urgent intervention.
AI model misinterpreting RFP requirements, causing incomplete or non-compliant proposals.	Conduct thorough AI training with diverse datasets; implement human review checkpoints during early submissions; continuously refine models based on feedback.
Data security and privacy breaches in cloud-based AI systems.	Use encrypted data storage and transmission; apply strict access controls and authentication; conduct regular security audits.
Infrastructure or API service downtime interrupting 24/7 operations.	Deploy redundant cloud hosting and backup systems; establish failover protocols to minimize downtime.
Limited human oversight leading to unnoticed errors.	Develop a monitoring dashboard with alert systems for anomalies; schedule periodic manual reviews especially during initial phases.
Budget constraints limiting feature scope and technical flexibility.	Prioritize critical features for initial deployment; plan phased enhancements post-setup; explore cost-effective solutions and negotiate vendor pricing.
Changes in government procurement rules or submission requirements.	Monitor regulatory updates regularly; design modular, adaptable AI components for easy updates; maintain open communication with procurement contacts.
Incomplete or delayed company data impacting AI training and proposal quality.	Establish clear internal data submission deadlines; automate data validation and reminders; assign responsibility for data completeness.
Overreliance on automation risking missed opportunities if system fails.	Develop fallback manual processes; maintain human oversight especially for critical submissions; implement comprehensive system testing before full autonomy.
Government portal changes disrupting AI navigation and submissions.	Implement regular monitoring of portal updates; maintain flexible AI operator scripts; have manual override options for urgent intervention.
AI model misinterpreting RFP requirements, causing incomplete or non-compliant proposals.	Conduct thorough AI training with diverse datasets; implement human review checkpoints during early submissions; continuously refine models based on feedback.
Data security and privacy breaches in cloud-based AI systems.	Use encrypted data storage and transmission; apply strict access controls and authentication; conduct regular security audits.
Infrastructure or API service downtime interrupting 24/7 operations.	Deploy redundant cloud hosting and backup systems; establish failover protocols to minimize downtime.

APPENDIX: SOLICITATION PLATFORMS & CODES

Level	Platform / Agency	Website	Codes Used
Federal	SAM.gov	sam.gov	NAICS 312112, 312111, 424490, PSC 8960
Federal	USAspending.gov (Post-Award Data)	usaspending.gov	NAICS / PSC for historical research
Federal	FPDS.gov (Archived Award History)	fpds.gov	NAICS / PSC historical spend data
Federal	Unison Marketplace (FedBid)	unisonmarketplace.com	NAICS, PSC 8960
Federal	GSA eBuy *(Schedule Holders Only)*	ebuy.gsa.gov	PSC 8960, GSA Schedule Contracts
State – TX	Texas SmartBuy / ESBD	txsmartbuy.com/esbd	NAICS + NIGP
State – CA	Cal eProcure	caleprocure.ca.gov	NAICS + NIGP
State – MD	eMaryland Marketplace Advantage (eMMA)	emma.maryland.gov	NAICS + NIGP
State – MA	COMMBUYS (Massachusetts)	commbuys.com	NAICS + NIGP
State – NY	New York State Contract Reporter (NYSCR)	nyscr.ny.gov	NAICS / NIGP
State – FL	MyFloridaMarketPlace (MFMP)	vendor.myfloridamarketplace.com	NAICS / NIGP
City – Dallas, TX	City of Dallas Bonfire Portal	dallascityhall.bonfirehub.com	NAICS / NIGP
City – Pasadena, CA	City of Pasadena Procurement	cityofpasadena.net	NAICS
City – Chicago, IL	City of Chicago eProcurement	chicago.gov/dps	NAICS 312112, 424490
County – Orange, CA	Orange County Procurement	olb.ocgov.com	NAICS + NIGP
County – Butte, CA	Butte County Purchasing	buttecounty.net/purchasing	NAICS + NIGP
County – Cook, IL	Cook County Procurement	cookcountyil.gov	NAICS + NIGP
School – TX	United Independent School District (UISD)	uisd.net/purchasing	NAICS + NIGP
School – FL	Lee County School District	leeschools.net	NAICS + NIGP
School – NYC	NYC DOE Vendor Portal	vendorportal.nycenet.edu	NAICS + NIGP
School – CA	Los Angeles Unified School District (LAUSD)	achieve.lausd.net	NAICS + NIGP
Coop – TX	BuyBoard Cooperative Purchasing	buyboard.com	NIGP
Coop – TX	H-GACBuy	hgacbuy.org	NAICS + NIGP
Coop – TX	NCTCOG	nctcog.org	NAICS + NIGP
Coop – National	OMNIA Partners (Public Sector)	omniapartners.com	NAICS + NIGP
Coop – National	NASPO ValuePoint	naspovaluepoint.org	NAICS + NIGP
Coop – Regional	TCPN (Now merged with OMNIA)	nationalipa.org	NAICS + NIGP

RELEVANT CLASSIFICATION CODES

Code Type	Code	Description
NAICS	312112	Bottled Water Manufacturing
NAICS	312111	Soft Drink Manufacturing (for flavored/alkaline)
NAICS	424490	Grocery Wholesalers (includes bottled water)
PSC	8960	Beverages, Non-Alcoholic (used in federal bids)
NIGP	Varies	Bottled water, water delivery, beverages