Requirements Document

NorthStar GPS

Your NorthStar for business growth

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1 INTRODUCTION

NorthStar GPS is a proposal management system that shall serve as a tool to help small business with the proposal development process. From the moment that the opportunity is identified, several steps will need to take place to transform the opportunity into a compliant and compelling proposal.

1.1 Purpose

Requirements management is a systematic approach to identifying, organizing, managing, and executing the changing requirements of a system. Industry studies cite poor requirements management as the most common reason for information technology (IT) project failure. It is therefore critical to define and follow engineering-based requirements management process to assure project success. This document will serve as guidance in the development and rollout of the NorthStar GPS product.

1.2 Scope

This document describes the product and the key modules and features of the NorthStar GPS application.

1.3 Objectives

This objectives of the NorthStar GPS application are:

- Provide a mechanism for small businesses to navigate the proposal development process in an intuitive, integrated, and all-encompassing environment
- To streamline the proposal development process
- To provide resources for reuse in future proposal activities
- To provide a repeatable proposal development process which allows for the identification of trends
- To provide a tool to help small businesses define and work toward proposal development and revenue business goals

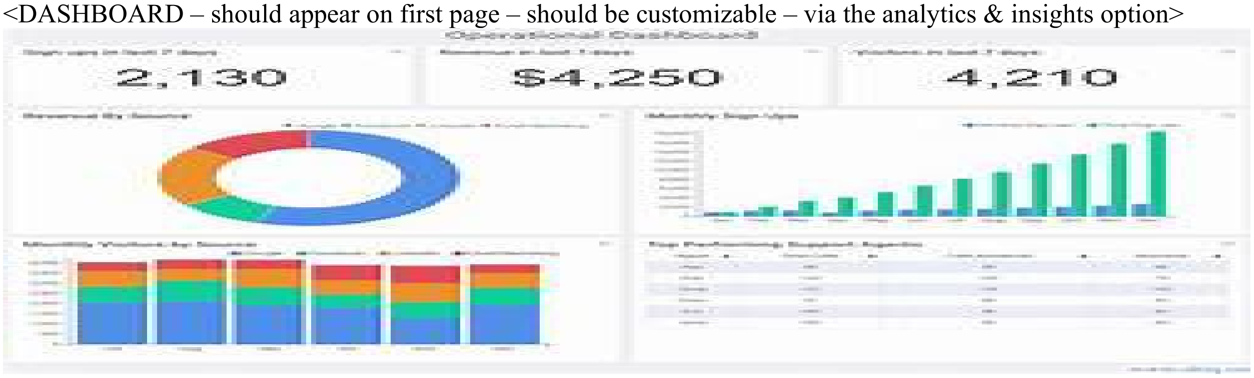
2 PRODUCT OVERVIEW

The NorthStar GPS serves as a tool to support small businesses in the development of proposals in response to opportunities. Although the system is primarily focused on responding to Federal contracting opportunities, the system may be customized to support the commercial sector. NorthStar GPS guides companies through the process of creating credible and compliant proposals. Proposals then become assets and may be used in the future to support similar requirements thus streamlining the proposal process as more proposals are developed. Companies are able to leverage content for future proposals which saves time and money in the development of proposals.

2.1 Key Modules/Features

NorthStar will usher the user through a series of steps based on the type of opportunity. Upon entry the user can start development of a new opportunity or view opportunities that are already available (completed & in process).

<DASHBOARD – should appear on first page – should be customizable – via the analytics & insights option>



*Progress indicator for proposals

NEW OPPORTUNITY (select opp type)	IN PROCESS OPPS	COMPLETED OPPS
RFP RFQ SubK Quote Commercial RFI MRAS	<list of all proposals>	<list of all proposals>

Module	Description
Plan	the proposal manager plans for developing the proposal and establishes the proposal repository, proposal schedule, proposal kickoff, and other key proposal planning documents
Build	the proposal manager builds the proposal outlines - Build the proposal outline using templates uploaded by the customer. The outline is built based on the opportunity requirements. There should be a drag and drop feature to build the outline and then place the resulting headers and other components into the customer's outline. Customer shall be able to associate a specific template with the opportunity.
Write	content is developed within the proposal outline in response to the requirements
Recover	proposal outlines are locked down and the proposal manager infuses all content and the result is a cohesive document that's ready for further enhancements
Review	conduct peer reviews of the proposal at various intervals; the final review will be accommodate with a compliance matrix; – the proposal manager is responsible for reviewing and compiling all content and posting the next iteration of the outline for further development and enhancement

Module	Description
Evaluate	develop an evaluation rubric based on the evaluation criteria and conduct a review scoring the proposal against the evaluation criteria
Finalize	finalize the proposal conducting checks such as spelling, grammar, conciseness; develop the acronyms listing
Submit	Submit the proposal; email should use standard submission verbiage; delineate submissions for questions, RFIs, RFPs etc.
Archive	Lock down all proposal assets in the proposal repository with access to the final versions only
Post Submission	Inform the team of submission Set up a reminder to check the status of the proposal at 60, 90, 120 day intervals. Intervals may be set by the proposal manager. Complete lessons learned
Doc Generator	view, download, and print proposal artifacts
PAL – Proposal Asset Library Management	Parse the proposal by topic to build the topical library Create the knowledgebase of finalized proposals Set a flag as to whether the proposal should be included in the knowledgebase build the library with content from proposals submitted, graphics, past performance, resumes etc.
Analytics, Insights, & Reports	Enter in performance metrics (goals i.e. 20 props per year) Show metrics on the entry screen in the dashboard section Run reports regarding overall performance (meeting deadlines, data calls completed, number of RFIs, RFPs, etc) – dashboard of performance
Settings	Custom settings that each company can set up for their NorthStar GPS instance

Each module and associated features are described below.

3 MODULES & ASSOCIATED FEATURES

3.1 *Plan*

PLAN	Initialize Workspace
	Proposal Info
	Business Logic (proposal level)
	Partner Info
	Requirements
	Personnel
	Past Performance
	Proposal Roles
	Proposal Schedule
	Proposal Task List
	Proposal Kickoff

3.1.1 *Initialize Workspace*

Initialize Workspace	▪ (SharePoint Site is setup using a standardized directory ▪ Task list should be included

<table>
<tr><td rowspan="2"></td><td colspan="2">▪ Team Requests – a list of requests from the team to the proposal manager (sort of like a help desk for the proposal effort)
▪ Notes should be used to take any meeting minutes for the specific proposal effort
▪ Set up group emails (distro list)</td></tr>
<tr><td>For: RFPs, RFQs, Quotes, Subk, Commercial
0_Final Files
1_RFP Files
2_Playbook
3_PropVols (sub-directory Graphics)
4_Pricing
5_Resumes (sub-directory Formatted)
6_Past Performance (sub-directory Final PPRefs)
7_Partner Files_Intel
8_Reviews
9_General_Admin</td><td>For: RFIs, MRAS
0_Final Files
1_RFI Files
2_Response
3_General_Admin</td></tr>
</table>

3.1.2 Proposal Info

Proposal Info	▪ PropID (auto-generated) ▪ *PropCode (10 characters -Internal)* ▪ Department ▪ Agency ▪ Title ▪ Solicitation Number ▪ *Bid Approval Date (Internal)* ▪ Date Due ▪ Questions Due Date ▪ Source of RFP ▪ NAICS ▪ Set-Aside/Full & Open ▪ Contract Type ▪ POP ▪ Place of Performance ▪ Award Timeframe	▪ Incumbent/Competition ▪ Special Skills/Requirements/Certs ▪ Facility Clearance Requirements ▪ Customer ▪ Customer POC ▪ Customer Title: ▪ Customer Address ▪ Customer CSZ ▪ Customer Phone ▪ Customer Email ▪ Submission Info

3.1.3 Business Logic (Prop Level)

Prop Business Logic	Allow company to enter in business logic regarding the specific proposal such as: -Pricing must not exceed $11M -Cannot use Remedy as a solution

3.1.4 Partner Info

Partners	▪ Partners (Partner_ID, Company, POC Name, Phone, Email, Notes – this can be multiples) ▪ Other Info ▪ Flag to indicate if the partner should be added to the preferred partner listing (if checked – add to the preferred partner listing)

3.1.5 Requirements

Requirements	▪ Core Task Areas/Requirements (need ability to enter in multiple requirements and associate with the PropID. (PropID + ReqID)

3.1.6 Personnel

Personnel	▪ PropID ▪ Resume Req'd (Y/N) ▪ Resumes Req'd (Positions) ▪ LOC Req (Y/N) ▪ Key Personnel Required (Role/Position Description) ▪ Clearance Requirements ▪ Cert Requirements

3.1.7 Past Performance

Past Performance	▪ #Past Perf Refs ▪ Selected Past Perf Refs ▪ Build Past Performance References ▪ PPQ Distribution

3.1.8 Proposal Roles

Proposal Roles	▪ Define the roles for the particular proposal (Prop Manager, Resumes, Past Performance, Pricing, Writers, Reviewers ▪ Partner POC equivalents – Resumes, Past Performance, Pricing, Writers, Reviewers.

3.1.9 Proposal Schedule

Proposal Schedule	▪ Enter proposal activities - Prop Activities Show calendar with all open prop activities listed> <When new is selected – the user should be able to select an activity (pulled from activities loaded under Criteria) and place it on the calendar. The proposal code will have to appear so that you know which prop is associated with each activity> ▪ Drag and drop proposal activities to the calendar ▪ ACTV_ID and ACTV Desc

3.1.10 Proposal Task List

Generate the task list in SharePoint and populate with general tasks – tasks will be added as the proposal "project" progresses. The questions will be included as a task and issued as a data call.

3.1.11 Proposal Kickoff

Develop the proposal kickoff brief by populating with the information collected in the proposal info, partner info, requirements, personnel, past performance, proposal roles, proposal schedule, and other modules. Should be a merge document with the specific proposal elements merged into the proposal kickoff template uploaded by the client.

3.2 Build

BUILD	Formatting Guidelines
	Template Selection
	Define Volumes
	Build Outlines
	Prepopulate Content
	WRAM (writer & reviewer assignment matrix)

3.2.1 Formatting Guidelines

Formatting Guidelines	▪ Formatting criteria per volume to include font, graphics font, table font, page count, margins etc.

3.2.2 Template Selection

Template Selection	▪ Select template to use from the templates library

3.2.3 Define Volumes

Prop Volumes

VID (auto generated to avoid dups)
Prop ID (inherit from proposal information)
Prop Code (internal code assigned to easily identify the prop)
Vol#
Vol Description

**prop can have multiple volumes – example below*

VID	Prop ID	PropCode	Vol#	Vol Description
0001	0001	CMS_ITSS	Vol I	Technical Approach
0002	0001	CMS_ITSS	Vol II	Past Performance
0003	0001	CMS_ITSS	Vol III	Price

*button to validate volume info once entered

This module will define the volumes associated with the proposal. The Build Outlines module will be used to input information for each specific volume. The volume must be defined at the proposal level to be visible in the Build Outlines Module.

3.2.4 Build Outlines (Outline Generator)

Build the proposal volumes based on the defined volumes criteria using a template from the templates library. User selects a template from the template library and a button should be selected to generate the outline for each volume defined in the define volumes option. If the volumes are not defined, an error message shall appear prompting the user to define the volumes for the proposal. User should be able to select the artifact. The system pulls the assignment template and populates by pulling data from the database. Artifact should be able to be previewed, printed, saved (by format), and made available in SharePoint for content development.

Required Prop Vols	User selects the proposal and the volumes associated with the volumes will be listed. The user can then select the volume they are generated the outline for.
Outline Generator	Allow entry of the various sections of the template 1.0 Technical Approach 1.1 Risk Management 1.2 Project Management 2.0 Staffing Approach 2.1 Recruiting 2.2 Retention 2.3 Key Personnel 3.0 Quality Management 3.1 Quality Assurance 3.2 Quality Control **Need a way to input the various sections of the outline Headings / Subheadings (MSWord)**
Section Requirements	Each section/subsection needs to have 3 components tied to it. Requirements – placed in yellow boxes of the template Eval Criteria – placed in blue boxes of the template Considerations – placed in green boxes of the template (include any strengths and proofpoints pulled from the database in this section) **need a way to collect this information for each section generated in the Generate function**
Generate Volumes	Generate each of the volumes with all info included. Should be able to preview and then export to Word/see it in SharePoint

3.2.5 Prepopulate Content

Pull from knowledgebase/content library to prepopulate proposal volumes with existing data that's relevant to the specific requirements.

3.2.6 WRAM

WRAM	▪ Develop the writer & reviewer assignment matrix using the sections in the outlines. ▪ Make assignments using the available resources as defined in proposal roles

3.3 Write

Write	Content Collaboration & Development
	Data Calls

3.3.1 Content Collaboration & Development

In SharePoint collab environment: Collaboration within docs; Tailoring content; development of proposal volumes via tailoring the prepopulated content to meet the requirements.

3.3.2 Data Calls

Data Calls	Enter and track all data calls that have been issued. Possibly use a form that can collect the info and allow for the info to be uploaded into the company database.

DC_ID	Prop Code	DC_Request	DC_Due	DC_Assigned to	DC_Status
0001	CMS_ITSS	Provide Logo	9/9/20		
0002	DHS_SETA	Provide # of Security+ resources	10/20/20		
0003	NASA_SEWP	Provide # of years supporting NASA	11/20/20		

*Assigned to – need to be able to track assignments to multiple people
*Define data call status Open, Past Due, Completed in dropdown.
*Can system send out data calls & reminders automatically?
*Data calls may include requests for graphics

3.4 Recover

Recover	Check out document in SharePoint to pause all collaboration
	Make any updates - Address content contributed by authors and finalize doc for the next iteration
	Post recovered doc back in SharePoint and send announcement to the team

3.5 Review

Review	Build Compliance Matrix
	Peer Review
	Conduct Compliance Review

3.5.1 Build Compliance Matrix

Build compliance matrix (proposal manager)

3.5.2 Peer Review

Pull latest volume and review and provide comments as requested by the Proposal Manager.

3.5.3 Compliance Review

Designated reviewers pull compliance matrix and review and provide comments as requested by the Proposal Manager.

3.6 Evaluate

Evaluate	Eval Criteria
	Build Eval Rubric
	Conduct Evaluation

3.6.1 Eval Criteria

Eval Criteria

- Eval Criteria

**prop can have multiple eval factors*

EvalCrit	Prop ID	PropCode	Factor ID	Factor Description
0001	0001	CMS_ITSS	Factor 1	Technical
0002	0001	CMS_ITSS	Factor 2	Past Performance
0003	0001	CMS_ITSS	Factor 3	Staffing

**prop can have multiple eval criteria per factor*

EvalCrit	Prop ID	PropCode	Factor ID + Desc	Eval Criteria
0001	0001	CMS_ITSS	Factor 1 Technical	Exp in healthcare IT
0001	0001	CMS_ITSS	Factor 1 Technical	Exp with EPA
0001	0001	CMS_ITSS	Factor 1 Technical	Exp with JAVA
0003	0001	CMS_ITSS	Factor 3 Staffing	CISSP Cert, 10yrs exp

3.6.2 Build Eval Rubric

Populate the eval rubric template for use in the evaluation

3.6.3 Conduct Evaluation

Conduct the evaluation using the eval rubric template for the proposal effort. Multiple reviews should be conducted and the information compiled. Maybe use MS Forms.

3.7 Finalize

Finalize	Build proposal checklist
	Finalize all docs, convert to PDF, Conduct final review (senior management)
	Set a flag that the proposal is finalized and ready for submission

3.8 Submit

Submit	Ensure that the flag is checked to indicate that the proposal is finalized and ready for submission (this is the approval)
	Submit the proposal using the submission info defined under proposal info – generate email with all finalized docs

3.9 Archive

Archive	Storage – lock versions - Place finalized PDF version in the proposal knowledgebase
	Revoke permissions to the SharePoint site (set a flag)
	Set completion flag / archive flag

3.10 Post Submission

Post Submission	Inform the team of submission
	Set up a reminder to check the status of the proposal at 60, 90, 120 day intervals. Intervals may be set by the proposal manager.
	IFNs/BAFO Management

3.11 Doc Generator

Doc Generator	Docs Generator

3.11.1 Doc Generator

<table>
<tr>
<td>Documents (Associated with the Specific Proposal)</td>
<td>Module which allows generation of both PropArtifacts and PropVolumes documents – Generate, Preview, Export to Word. User must select the proposal first and then the docs. Can the user select multiple docs to be generated?
<table>
<tr>
<td>Proposal / RFI Directory
RFP Summary Brief
Capabilities/Gap Matrix
Strengths Registry
Proofpoints
Past Performance Template
Q&A Form
Subcontractor Consent
Proposal Schedule
Target Rate Cards</td>
<td>Key Personnel Position Descriptions
Resume Template
Letters of Commitment Template
Proposal Production Checklist
Writer and Reviewer Assignment Matrix (WRAM)
Compliance Matrix</td>
<td>Master Data Call
Data Call Tracker
Proposal KO Brief
Review Briefs
Evaluation Rubric/Scorecard
Supplemental Plans (PM, QCP, OCI, Compensation, Staffing, Transition)</td>
</tr>
</table>
Volume I – xxx
Volume II – xxx
Volume III – xxx *only volumes associated with the proposal will appear in the list</td>
</tr>
</table>

3.12 PAL – Proposal Asset Library Management

PAL	Proposal Library
	Content Library
	Graphics Library
	Resume Library
	Master Past Performance Refs
	Custom Past Perf Refs

3.12.1 Proposal Library

Place all finalized proposal volumes in the proposal library. There should be directories for Technical, Management, Past Performance, Business/Price, Quality, and Other Volumes. Do not overwrite any duplicates.

3.12.2 Content Library

Develop a content library by topic. Parse the proposal and add to the proposal content library (complexity – if a cybersecurity topical doc exists – the content in the current proposal should be added to the top of the document – will need to differentiate each insert – discuss the single row table that sections off each iteration). Do not overwrite any duplicates.

3.12.3 Graphics Library

Search the 3_PropVols (sub-directory Graphics) for the proposal and place all docs in this directory into a global graphics library. Do not overwrite any duplicates.

3.12.4 Resume Library

Search the 5_Resumes (sub-directory Formatted)for the proposal and place all docs in this directory into the resume library. Do not overwrite any duplicates.

3.12.5 Master Past Performance Refs

This library should be populated with the company's master past performance references. These may be uploaded in the PAL at the same time as the templates. The master past performance references are used to develop the past performance references for the specific proposal. The master past performance refs should only be edited by the proposal manager or people with admin access as these are the key sources for developing the custom past perf references.

3.12.6 Custom Past Perf Refs

Search the 6_Past Performance (sub-directory Final PPRefs) for the proposal and place all docs in this directory into the customer past per refs library. Do not overwrite any duplicates.

3.13 Analytics, Insights, & Reports

Analytics & Insights	Performance Metrics
	Reports Generator
	Lessons Learned
	Strengths Registry
	Proofpoints
	Partner Evals
	Debrief Info
	CPARS Info

3.13.1 Performance Metrics

Generate performance metrics as it relates to proposal management and development.

3.13.2 Reports Generator

Generate various reports for insight into proposal activities.

3.13.3 Lessons Learned

Lessons Learned

Track lessons learned from each proposal effort.
Complete lessons learned & Set flag to indicate completion of lessons learned activity

LL_ID	Prop Code	Lesson Learned	Action Required?	Assigned To	Date Due	Date Complete
0001	CMS_ITSS	Update resource pipeline to track certs	Y	HR		

3.13.4 Strengths Registry

Strengths Registry

Track strengths of the company by area

STR_ID	Area	Strength
0001	Staffing	Access to over 1k technical resources with TS/SCI Clearances.

3.13.5 Proofpoints

ProofPoints

Track ProofPoints by Area and tie back to the customer

PRFPT_ID	Area	Customer	Strength
0001	Cybersecurity	Army	Access to over 1k technical resources with TS/SCI Clearances.

*Customer should be a dropdown of all of the customers. The customer list should be provided in the Settings module.

3.13.6 Partner Evals

Partner Evals

This should be an evaluation where we can rate our partners for each proposal effort. The Proposal Manager should be responsible for completing this or designating someone on the team to complete. There should be one eval for each partner per proposal effort.

PROP_ID	PROP_Code	Partner_ID	Company
0001	CMS_ITSS	ABC_INC	ABC, Incorporated

	<table><tr><th>Area</th><th>Positive (10)</th><th>Neutral (5)</th><th>Negative (0)</th></tr><tr><td>Technical Capability</td><td></td><td></td><td></td></tr><tr><td>Technical Writing (Quality)</td><td></td><td></td><td></td></tr><tr><td>Past Performance References (Quality)</td><td></td><td></td><td></td></tr><tr><td>Recruiting (Key Personnel – Quality)</td><td></td><td></td><td></td></tr><tr><td>Timeliness</td><td></td><td></td><td></td></tr><tr><td>Responsiveness</td><td></td><td></td><td></td></tr><tr><td>Proposal Resources – Availability</td><td></td><td></td><td></td></tr><tr><td>Contract Management</td><td></td><td></td><td></td></tr><tr><td>Pricing/Affordability</td><td></td><td></td><td></td></tr><tr><td>Flexibility</td><td></td><td></td><td></td></tr></table> This can also serve as input the Preferred Partner List as well. Partners that do well and receive "good" reviews can be identified. Max Score is 100. Can add to preferred partners listing based on a score of 70 and above. The end user should be able to set this score to automatically add to the preferred partners listing.

3.13.7 Debrief Info

Debrief Info	Collect info obtained from debriefs to be used in future efforts. This information can then be pulled in the Green Considerations box so that you have this info directly in the outline for "consideration." Need a form to collect the information. Currently have an Excel Form.

3.13.8 CPARS Info

CPARS Info	Collect info obtained from CPARS. Need a form to collect the information. Currently have an Excel Form.

3.14 Settings

Settings	Org Info
	User Access & Permissions
	Template Library
	Business Logic (company level)
	Proposal Activities
	Preferred Partner Listing

3.14.1 Org Info

****Like an Administrator Panel***

Company Profile (one primary profile)	Company Address1 Address2 City State	Zip DUNS UEI CAGE Web
Company Certifications	can have multiple certifications (Cert ID, Cert Description, Exp Date)	
Company SocioEcon Designations:	can have multiple SocioEcon Designations (SED ID, SED Description)	
Company POC (can have multiple – should indicate name that should appear on the proposal cover)	Name Title	Email Phone

3.14.2 User Access & Permissions

Provide access to users and define permissions

3.14.3 Template Library

Template Library	Serves as the templates library. Will need to associate a template with the specific proposal. Will be able to use a standard template for each of the Proposal Manager based documents. The actual volumes of the proposal may need to have the capability to select from various types of documents. Determine if templates will need to be defined at the proposal level and/or enterprise-level. Must associate each system template below with a company template. If a company template isn't available (for example – WRAM), use the templates that come with the system. The system should have templates for each of the items below for the user to choose from.

Proposal / RFI Directory RFP Summary Brief Capabilities/Gap Matrix Strengths Registry Proofpoints Past Performance Template Q&A Form Subcontractor Consent Proposal Schedule	Key Personnel Position Descriptions Resume Template Letters of Commitment Template Proposal Production Checklist Writer and Reviewer Assignment Matrix (WRAM) Compliance Matrix	Master Data Call Data Call Tracker Proposal KO Brief Review Briefs Evaluation Rubric/Scorecard

3.14.4 Business Logic (company level)

Business Logic	Allow company to enter in business logic regarding proposal processes such as: -Kickoff must occur w/i 3 days of bid approval date -Prop must be ready w/i 2 days prior to due date -If Partner Eval survey score is 70 or above add the partner to the Preferred Partners Listing

3.14.5 Proposal Activities

Prop Activities	ACTV_ID ACTV_Desc

Sample Proposal Activities to include also allow customization:

Initial Internal Meeting KO Meeting Questions Due 1D/W1 Content Due 1D/RC1 1D/RV1 2D/W2 Content Due 2D/RC2 2D/RV3 Compliance Review Halftime Huddle 3D/W3 Content Due 3D/RC3 3D/RV3	End Zone Huddle 4D/W4 Content Due 4D/RC4 4D/RV4 Pocket Activities Release Activities Review Activities (internal) Status Meeting (determined per opportunity) Internal Due Date Proposal Due Date

3.14.6 Preferred Partner Listing

Provide a list of preferred partners so that partner info can be prepopulated. Should be able to add preferred partners, import from Excel, add during completion of partner info, and after completion of the partner evaluation.

Company	Past Performance (Customers)	Capabilities	Business Type	POC	Phone No	Email

4 SYSTEM REQUIREMENTS

NorthStar GPS will be built using the following tools:

GitHub	developer platform that allows developers to create, store, manage and share their code
GraphQL	open-source data query and manipulation language for APIs and a query runtime engine
Typescript	High-level programming language
JavaScript	programming language
Jira	agile project management tool that supports any agile methodology; uses agile boards, backlogs, roadmaps, reports, to integrations and add-ons to plan, track, and manage agile software development projects
Figma	**Wireframing app**
Cloud Storage Solution	

Integrated Apps
-SharePoint
-MS Office (Word, Excel, PowerPoint)
-MS Forms

5 COST STRUCTURES

- Cloud-based (data held in a cloud)
- Subscription-based – Flat fee plus a fee per user OR Packages based on number of users.

6 OTHER REQUIREMENTS

- Signing Up – will need a webpage for purchasing and will need some type of payment collection (stripe, paypal etc.)
- Account Management – will need a backend account management tool – send out renewals, process cancellations, and any credits
- Helpdesk/Technical Support/Technical Documentation