[Company Logo]

**Request for Proposal**

[Solution]

[Year]

*[Company Copyright + Year]*

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[Company] [Overview](#_heading=h.gjdgxs) page #

[Statement of Purpose and Background](#_heading=h.tyjcwt) page #

[Document Purpose](#_heading=h.3dy6vkm) page #

[Document Specific Definitions](#_heading=h.1t3h5sf) page #

[Project Background and Objective](#_heading=h.4d34og8) page #

[Project Scope](#_heading=h.2s8eyo1) page #

[Current Environment](#_heading=h.3rdcrjn) page #

[Desired “To-Be” Environment](#_heading=h.26in1rg) page #

[Desired Delivery Roadmap](#_heading=h.lnxbz9) page #

[Proposal and Due Diligence Guidelines and Requirements](#_heading=h.35nkun2) page #

[Proposal Compliance](#_heading=h.1ksv4uv) page #

[Company] [RFP Contact](#_heading=h.44sinio) page #

[Company] [Project Manager](#_heading=h.2jxsxqh) page #

[Vendor Due Diligence](#_heading=h.z337ya) page #

[Vendor Questions Prior to Proposal Due Date](#_heading=h.3j2qqm3) page #

[RFP Schedule and Due Dates](#_heading=h.1y810tw) page #

[Vendor Questions and Correspondence](#_heading=h.4i7ojhp) page #

[Vendor Correspondence with [Company] Personnel and Contractors](#_heading=h.2xcytpi) page #

[Submission of Proposal](#_heading=h.1ci93xb) page #

[Proposal Validity Period](#_heading=h.3whwml4) page #

[Compan[y]’s Reservation and Statement of Rights](#_heading=h.2bn6wsx) page #

[No Implied or Oral Contracts](#_heading=h.qsh70q) page #

[Vendor Solely Responsible for Its Costs](#_heading=h.3as4poj) page #

[RFP corrections or Clarifications](#_heading=h.1pxezwc) page #

[Customer Reference Calls](#_heading=h.49x2ik5) page #

[Oral Presentations and Demonstrations](#_heading=h.2p2csry) page #

[Proof of Concept or Sandbox Environment](#_heading=h.147n2zr) page #

[Proposal Format](#_heading=h.3o7alnk) page #

[Executive Summary](#_heading=h.23ckvvd) page #

[Vendor’s Response to Questionnaire and Requirements Workbook](#_heading=h.ihv636) page #

[Solution Pricing](#_heading=h.32hioqz) page #

[Security](#_heading=h.1hmsyys) page #

[Additional Information](#_heading=h.41mghml) page #

[Response to Proposed Terms and Conditions](#_heading=h.2grqrue) page #

[Appendices](#_heading=h.vx1227) page #

# [Company] Overview

## Overview

[Company] is a leading provider of [product or services. Include boilerplate here.] Additional information is available at [Website].

# Statement of Purpose and Background

## Document Purpose

[Company] is issuing this formal Request for Proposal (“RFP”) to solicit Proposals for a [Solution]. This includes all software and services needed to [purpose of the Solution]. This Solution should allow [Company] to [Company’s objective with Solution].

This RFP has been compiled from a requirements analysis based on the best information presently available.

## Document-Specific Definitions

For purposes of this document, the party to whom the RFP is addressed shall be referred to as “Vendor,” and any materials submitted in response to the RFP shall be referred to as “Proposal.” Any reference to “Solution” shall mean the total combination of products and services offered by Vendor to achieve [Company]’s defined Project objectives and meet the business and technical requirements set forth in the RFP. Any reference to “Project” shall mean [Company]’s underlying business initiative that encompasses, in whole or in part, the Solution sought by this RFP.

## Project Background and Objective

[Company] has partnered with business representatives to evaluate business needs related to what [Company] needs to gain from a [Solution]. The group determined the features needed to be successful and the modern capabilities demanded in today’s atmosphere. After the initial request for information, the group determined the solutions that could potentially meet those needs.

[Company] is looking to partner with a vendor(s) that can provide innovative solutions to address its current business needs and that possesses the aptitude to successfully evolve its solutions and services to meet the future needs of the company and its clients.

## Project Scope

For purposes of responding to this RFP, Vendor should take into consideration the following major Project scope factors.

| Major Project Scope Factors - Agency | | In or Out of Scope |
| --- | --- | --- |
| 1 | [Factor 1] | [In/Out] |
| 2 | [Factor 2] | [In/Out] |
| 3 | [Factor 3] | [In/Out] |
| 4 | [Factor 4] | [In/Out] |
| 5 | [Factor 5] | [In/Out] |
| 6 | [Factor 6] | [In/Out] |
| 7 | [Factor 7] | [In/Out] |
| 8 | I[Factor 8] | [In/Out] |
| 9 | [Factor 9] | [In/Out] |

[Company] reserves the right to award all or just parts of the scope. Should Vendor be able to propose a bundle discount or special pricing compared to the individual modules described above, please describe both cost modules in the Proposal.

## Current Environment

[Company] currently uses [concise description of the current environment; Solution that will be implemented; and, if applicable, how Solution will align or integrate with existing software].

## Desired “To-Be” Environment

[Description of the challenge, the purpose of implementing the application, and a high-level description of the requirements for the Solution’s configuration.]

Attached is the [Solution] – RFP Questionnaire Requirements Workbook, with the detailed requirements that will ensure the business, technical, security, and integration needs are met. Please indicate the Solution’s support for each item listed in the workbook.

[Provide an Excel workbook with detailed requirements.]

Please indicate the Solution’s support for each item listed in the workbook.

* SUP: Fully Supported in Product
* 3rd: Support through Add-on/Third Party
* CST: Custom
* FUT: Future Product Enhancement
* NS: No Support
* VC: Vendor Comment

A detailed outline of requirements and questions can be found in the Excel attachment [Solution] – RFP Questionnaire Requirements Workbook.

## Desired Delivery Roadmap

[Company] expects to play a moderate role in implementation while relying on Vendor’s experience, expertise, and ability to architect, design, install, configure, integrate, and perform knowledge transfer. [Company] expects Vendor to work closely with [Company] business units, internal configuration, leaders, and selected users throughout the process.

[Company] seeks Vendor’s input on the best way to achieve the transition with the least interruption to the business while minimizing risks, interim/transition configuration, and programming (e.g., network routing, routing paths on [Company]’s current or new system, etc.), and impacts integration with other systems. [Company] expects Vendor to provide an average implementation schedule.

# Proposal and Due Diligence Guidelines and Requirements

## Proposal Compliance

Vendor’s Proposal must be made in accordance with the guidelines and requirements set forth in this RFP. Failure to comply may result in the rejection of Vendor’s Proposal. Vendor is responsible for requesting clarification for any perceived errors or ambiguities in these guidelines and requirements.

## [Company] RFP Contact

The individual listed below (“[Company] RFP Contact”) shall be [Company]’s representative with respect to the following matters:

* RFP administration
* Vendor-qualification processes
* Proposal-evaluation processes
* Decision-making processes
* Internal approval processes
* Contract negotiations
* Price negotiations
* Financial considerations

All questions and correspondence related to the matters listed above must be directed to the [Company] RFP Contact. No other [Company] personnel shall be contacted regarding these matters unless specifically authorized. Failure to adhere to this requirement may result in the rejection of Vendor’s Proposal.



## [Company] Project Manager

The individual listed below (“[Company] Project Manager”) shall represent [Company] with respect to defining the scope, objectives, and requirements of the Project as well as managing all [Company] due-diligence activities. Except as provided for, no other [Company] personnel shall be contacted unless specifically authorized by the individual below. The [Company] Project Manager will coordinate meetings and other contacts between Vendor and [Company] personnel as necessary. Failure to adhere to this requirement may result in the rejection of Vendor’s Proposal.



## Vendor Due Diligence

This RFP is intended to provide Vendor with enough information to build its Proposal, but it is Vendor’s responsibility to request and interpret any additional information deemed necessary.

## Vendor Questions Prior to Proposal Due Date

Questions and requests for clarification made prior to the Proposal Due Date and intended to assist Vendor in formulating its Proposal shall be submitted in writing and delivered via email to the [Company] RFP Contact and the [Company] Project Manager no later than the date and time listed in RFP Schedule and Due Dates. Written responses will be provided by the [Company] RFP Contact in a diligent manner prior to the Proposal Due Date. All other [Company] employees have been instructed not to communicate directly with [Respondents] during this period. Contact with other [Company] employees on this matter without direct referral from the [Company] RFP Contact or the [Company] Project Manager is grounds for Proposal disqualification.

General questions and requests for clarification by a particular Vendor and responses provided by [Company] will be disseminated to all participating Vendors.

## RFP Schedule and Due Dates

The following schedule and due dates may be modified at the discretion of [Company] at any time. Vendor will be notified of changes to this schedule.

| **Date** | **Time** | **Description** |
| --- | --- | --- |
| [Date] | [Time] | RFP Issued to Vendors |
| [Date] | [Time] | Intent to Respond |
| [Date] | [Time] | Deadline for Submission of Questions Prior to Proposal Due Date |
| [Date] | [Time] | Responses Returned to All Vendors |
| [Date] | [Time] | Proposal Due Date via Email |
| [Date] | [Time] | Proposal Demos, Virtually via Teams (2 hours) |
| [Date] | [Time] | Proposal Evaluations by [Company] |
| [Date] | [Time] | Proof of Concept or Sandbox Environment |
| [Date] | [Time] | Contract Award |

**PROPOSALS RECEIVED AFTER THE PROPOSAL DUE DATE/TIME MAY BE REJECTED.**

## Vendor Questions and Correspondence

Questions or correspondence after the Proposal Due Date should be submitted in writing and delivered via email to the [Company] RFP Contact. Written responses will be provided by the [Company] RFP Contact and delivered to all participating Vendors.

## Vendor Correspondence with [Company] Personnel and Contractors

To the extent Vendor is authorized to correspond with other [Company] personnel or contractors during the RFP process, the [Company] RFP Contact and the [Company] Project Manager shall always be copied.

## Submission of Proposal

Proposals must be submitted on or before the Proposal Due Date by sending one (1) electronic copy of the Proposal via email to the [Company] RFP contact. The [Company] RFP Contact will acknowledge receipt by notifying Vendor via email.

## Proposal Validity Period

All Proposals and the terms and conditions located therein must be valid for a period of at least 180 days from the Proposal Due Date. Any changes to [Respondent]’s Proposal after the Proposal Due Date are subject to acceptance by [Company].

## [Company]’s Reservation and Statement of Rights

The issuance of this RFP and [Company]’s receipt of any Proposals shall not, in any manner, obligate [Company] to perform any act or otherwise incur any liabilities. [Company] assumes no obligation to reimburse or otherwise compensate any third party or recipient of this RFP for losses or expenses incurred in connection with this RFP. [Company] shall have the right to use, for any purpose, any information in connection with this RFP.

[Company] reserves the right (1) to withdraw the RFP at any time prior to the execution of a contract; (2) to decide not to award a contract to any Vendor for any reason; (3) to reject a Proposal or award the contract without inviting the Vendor to submit a new Proposal; (4) to negotiate with any source considered qualified; (5) to request, orally or in writing, clarification of or additional information concerning Proposal(s) that are considered competitive; (6) to waive minor informalities or irregularities or any requirement of the RFP; (7) to accept any Proposal in part or in total; (8) to select a Proposal other than the lowest-cost Proposal; and (9) to reject a Proposal that does not conform to the specified format or the other requirements of this RFP.

Prior to any award, [Company] may require the Vendor to submit or identify in writing price data bearing on the reasonableness of the offer. To the extent it is reasonable, [Company] reserves the right to have its authorized representatives inspect facilities and examine any books, documents, papers, records, or other data of the Vendor that pertains to and involves transactions related to its Proposal for the purpose of evaluating the accuracy, completeness, and currency of data supplied.

[Company] reserves the right to refuse any Proposal or offer at its sole discretion.

[Company], at its sole discretion, may award other contracts for additional work. The Vendor shall fully cooperate with such other third parties retained by [Company] and shall adjust its own work to that provided under other contracts that [Company] might execute. [Company] may award responsibilities to third-party subcontractors.

[Company] shall not be obligated to explain the reasons for any decisions made in connection with this RFP.

## No Implied or Oral Contracts

This RFP is not intended to constitute an offer of a binding agreement to negotiate or consummate a contract between [Company] and Vendor or any third party. Nor is it an agreement to enter into a binding agreement and shall not be regarded as imposing any obligation or liability on [Company]. Any legal obligation between the parties shall be noted in a duly executed contract.

Furthermore, [Company]’s invitation to Vendor to proceed further in the RFP process or to begin negotiations toward a final contract does not create a contract between [Company] and Vendor. Correspondingly, [Company] reserves the right to negotiate final terms and conditions with one or more other Vendors.

A final written contract is contingent upon approval by senior management of [Company]. Absent such approval, any award of contract is conditional and may be canceled without liability on the part of [Company]. No contract may be made orally.

## Vendor Solely Responsible for Its Costs

Vendor shall be solely responsible for all costs and expenses associated with the development and submission of its Proposal. [Company] assumes no contractual or financial obligation as a result of the issuance of this RFP, including but not limited to the preparation and submittal of a response by Vendor, the evaluation process, or participation in Vendor question-and-answer sessions, oral presentations, demonstration sessions, product evaluation, and any subsequent contract negotiations.

## RFP Corrections or Clarifications

Corrections or clarifications to the RFP will be issued by the [Company] RFP Contact in the form of an Addendum to the RFP and will be sent by email to all Vendors. Vendor should promptly acknowledge receipt of such Addendum. If a Vendor fails to acknowledge receipt of any Addendum, its Proposal will nevertheless be construed as though the Addendum has been received and acknowledged.

## Customer Reference Calls

[Company] may request Vendor to facilitate telephone interviews of identified customer references. Vendor should ensure resources are available to facilitate and conduct such customer reference calls. The [Company] RFP Contact will work with the Vendor to arrange for such telephone interviews.

## Oral Presentations and Demonstrations

After [Company] has reviewed all submitted Proposals, selected Vendors may be given an opportunity to present oral presentations and demonstrations as outlined below. [Vendor] shall be prepared to talk about the following high-level items:

* Vendor qualifications and experience
* Solution’s ability to meet [Company]’s business and technical requirements
* Ability of the proposed Solution to bring added value to [Company]
* Implementation capabilities (professional services)
* Pricing structure
* Additional questions and answers

## Proof of Concept or Sandbox Environment

A structured Proof of Concept or Sandbox Environment will be required as part of the RFP process. Details as to the scope and time are to be determined at a later time. Vendor must acknowledge as part of its Proposal a willingness to fully support such a Proof of Concept or Sandbox Environment. Vendor is expected to offer no-cost evaluation rights for this Proof of Concept or Sandbox Environment and to provide no-cost resources necessary to support [Company] personnel during the implementation and conduct of the Proof of Concept or Sandbox Environment.

# Proposal Format

The following section specifies the format that must be used to prepare Vendor’s Proposal. The purpose of this specific format is to facilitate review of all Proposals. At its discretion, [Company] may consider any deviation from this format as nonresponsive and disqualify such Proposal from further consideration. Vendor shall ensure its Proposal is prepared simply and economically, providing a straightforward, concise delineation of capabilities to satisfy the requirements of this RFP. Emphasis in each Proposal shall be on completeness and clarity of content.

The structure of all Proposals will be comprised of the following separate sections:

* Executive Summary
* Completed [Solution] – RFP Questionnaire Requirements Workbook
* Solution Pricing
* Additional Information (if applicable)
* Response to Proposed Terms and Conditions (SaaS Template)
* Security

The electronic version of Vendor’s Proposal should contain file names and structure consistent with the following convention: Vendor Name RFP Title Name of Attachment.

## Executive Summary

This Executive Summary comprises the first section of the Proposal and will contain a clear and concise summary of Vendor’s Proposal. Preferably, the document will be in a standard presentation format (i.e., PowerPoint) and will not exceed twenty (20) pages in length. It should be able to stand apart from the rest of Vendor’s Proposal as a high-level overview and should be suitable for executive presentations.

The first part of the Executive Summary should summarize Vendor’s response to the Vendor Qualifications Worksheet with an outline and emphasis on the following:

* Company background
* Company and Solution references
* Company and Solution’s unique competitive advantages
* Research and development commitment
* Support and account management structure for [Company]
* Professional services capabilities
* W/MBE status

The second part of the Executive Summary should summarize its Solution capabilities and limitations in relation to the business and technical requirements set forth in the Detailed Response to [Solution] – RFP Questionnaire Requirements Workbook. Vendor should candidly identify areas of strengths and weakness in its Solution capabilities.

The third and final part of the Executive Summary should summarize the terms and conditions and pricing of the proposed Solution. This part of the document should address the following general outline and emphasis:

* Existing contractual relationship with [Company] (if any)
* Major concerns to [Company]’s standard form agreements (please attach a redline of the SaaS template provided)
* Licensing structure – options and recommended
* Pricing for the Solution and all related services in detail

## Vendor’s Response to Questionnaire and Requirements

Vendor is required to enter a self-assessment of each business and technical requirement set forth in the Detailed Response to [Solution] – RFP Questionnaire Requirements Workbook, which has been provided as a separate attachment to this RFP. Vendor’s response to this section should be labeled under a section of its Proposal entitled “Detailed Response to Requirements.”

In no circumstances may Vendor alter, recreate, or otherwise modify the workbook without the prior written approval of the [Company] RFP Contact. If Vendor is unable to provide a response within the confines of the workbook format for a particular requirement, a separate document may be referenced and included in the Appendices section of Vendor’s Proposal. In such an event, Vendor should place a reference to the appendix, page, and section number of the information in the column entitled “Reference.”

## Solution Pricing

Vendor’s response to this section should be labeled under a section of its Proposal entitled “Solution Pricing.”

All pricing must be listed in a single document separate from the rest of Vendor’s Proposal. Vendor shall attach a separate document to address pricing.

Vendor shall provide pricing and any associated discounts, including list price, in a clear and concise manner. Pricing should be detailed and will not include an all-inclusive or blended amount.

**Failure to break prices into details may result in the rejection of Vendor’s Proposal. Pricing that is difficult to decipher or that does not provide the level of detail required above is grounds for disqualifying Vendor’s Proposal.**

## Security

Provide the following as applicable:

[bullet point list of security requirements]

If Vendor is unable to provide any of the above, please address why.

## Additional Information

Any information not expressly requested by this RFP or required to supplement any other part of Vendor’s Proposal (e.g., additional features or services, intangible considerations, special unique features, or services planned for the near future) should be labeled under a section of its Proposal entitled “Additional Information.”

[Company] encourages Vendor to bring forward innovative ideas in addition to what is required in this RFP. Vendor should describe any unique capabilities it possesses for assisting [Company] in achieving additional improvements and describe how it would make such capabilities available to [Company]. However, the total amount of pages should not exceed 10 pages.

## Response to Proposed Terms and Conditions

Vendor’s response to this section should be labeled under a section of its Proposal entitled “[Company] SaaS – Vendor Name.”

Vendor must review [Company]’s standard-form agreement (the “Agreement”), which is attached to this RFP as an Attachment and specify any and all exceptions to the terms and conditions located therein via a redline. Where appropriate, Vendor should propose alternate or additional language and make every effort to explain the reason for its exceptions. In the interest of time, the sections that are highlighted in green are the ones we would like Vendor’s team to focus on. If Vendor has the time to address all sections, Vendor may feel free to do so.

Vendor should use the attached Agreement as the source documents for its response and make all deletions, additions, and modifications identifiable by using Microsoft Word’s “Track Changes” feature. Under no circumstances will Vendor alter the document to make it password protected or “read-only” or change the format from Microsoft Word (e.g., a PDF file).

**[Company] expects Vendor to conform substantially to the terms and conditions of the Agreement. Failure to substantially conform to the Agreements will affect Vendor’s overall rating. [Company] reserves the right to change the terms and conditions of the Agreement at any time prior to execution and will expect substantial compliance with such changes**.

[Company] believes its proposed terms and conditions are reasonable and customary. In the event Vendor believes a particular term or condition is not accounted for in its standard pricing model or prevents the offer of discounts otherwise available, Vendor should specify the cost or lost discount associated with its acceptance of the proposed term or condition.

## Appendices

All supplemental information should be labeled and ordered under a section of Vendor’s Proposal entitled “Appendices.” These documents should be clearly marked under a standard and consistent naming convention (e.g., Appendix 1, Appendix 2, etc.). Vendor is strongly encouraged to verify the accuracy of all references in its Proposal to documents located in the Appendices. References should specify the name of the correct Appendix and the section or page number containing the supplemental information.