Request for Proposal (RFP) Committee Checklist

Please provide the primary PSU department contact for the RFP.

RFP Components

1. List of suppliers that the RFP will be sent to should include contact name, email and physical address

2. RFP Timeline
   - Issue Date
   - Pre-bid Conference (if required)
   - Questions Due
   - Proposal Submittal
   - Supplier Presentations
   - Negotiations
   - Contract Development
   - Commence Contract

3. Background – This section reports on current conditions at Penn State / Department and provides background about the RFP.

4. Objectives – This section may include a scope of work or project summary for what the Department needs.

5. Proposal Requirements – RFP requirements are intended to communicate what the Department expects to see in the Supplier's response. Typically this section includes questions that the Suppliers must answer. All items/features/services should be worded to require a response. List each requirement separately and clearly state how you want the Supplier to respond. Yes/No questions can be used as well as questions such as "provide a detailed explanation of…" "describe how your (product/service/company) …"

   Suggested items to include in this section are:
   - Features that <u>must</u> be included (mandatory requirements)
   - Features that <u>may</u> be included (proffered or value-added items, features, or services)
   - Consider future needs of your department as well.

   Specifications may be presented as performance specifications, i.e. "equipment jams occur no more often than once every 5,000 feeds per evaluation by independent labs" or as design specifications – "system must utilize a straight path design. This is intended to eliminate equipment with multiple turn-paths, which has been proven to cause jams."

   The omission of any mandatory requirements from the RFP may result in unacceptable goods and/or work being proposed by suppliers. Excessive/unnecessary requirements or preferences may limit competition or cause pricing to be needlessly expensive.

6. Specifications – This section explains the University's terms, provisions, conditions, restrictions and stipulations. Suggested items to include in this section are:
   - Inform the supplier of any PSU policy that may affect the proposed system (i.e. Single Sign On capabilities, secure transactions, PCI DSS or FERPA compliance)
   - Equipment warranty – length and scope of warranty
   - Service guarantee
   - Responsibility for installation/implementation (whether the University or the Supplier)

- Training
- Customer Support (i.e. 8-5 EST, 24x7, etc.)
- Response time (i.e. 6 hrs. M-F, 12 hrs. weekends, etc.)
- Site preparation or specific equipment required by the University or the Supplier as needed
- On-going maintenance and support including hours of availability and personnel
- Training necessary to operate and maintain the equipment both initially and continuing
- Documentation required - this includes not only training materials or operational manuals, but also reports. In the case of reports, state the frequency of the requested reports, provide samples, ask the Supplier to outline the process for requesting reports and describe the desired method of receiving reports (format, delivery method, etc.)

7. A Description of Services may also be appropriate depending on the nature of the RFP. This section expands on the Scope of Work description identified in the RFP. Describe the desired services and outcomes, deliverables and reports. List services that must be included and additional services that may be preferred or add value.

   You may need to identify such things as roles and responsibilities, implementation and/or transition plans, and training requirements. Request that the Supplier describes methodology, defines service guarantees, etc. An example is provided below.

   - Implementation
     - Provide a statement of the project approach
     - Prepare a work plan with key dates and milestones. Your response should include:
       - Identification of tasks to be performed and/or goods to be provided by Supplier
       - Timeframes to complete performance of the identified tasks and overall project completion
     - Implementation strategy, including employee training
   - Team Credentials
     - Provide summary resumes for the proposed project team members or assigned staff, including their specific experience with similar projects, qualifications and special expertise as well as number of years with your company.

8. Pricing – A fill in the blanks format is recommended for ease of evaluation. An itemized quote will help you compare prices among competitors and also identify individual cost elements that may be negotiated. The following is an example of a pricing template.

Equipment	$ _____
Equipment Installation	$ _____
Implementation Services	$ _____
Estimated Hours	_____
Hourly Rate	$ _____
Software License Cost	$ _____
Additional Licenses (if purchased at a later date)	$ _____
Annual Support & Maintenance Fees	$ _____
Any other costs (please be specific)	$ _____
TOTAL COST	$ _____