1.5: Request for Proposals – Template

A Request for Proposal (RFP) is a document created when an agency determines it would like to contract with an external business, vender, consultant, or supplier for a specific product or needed service. Typically, an RFP is used to announce funding has been made available for a project to acquire a product or service. Then potential suppliers/vendors submit business proposals, often called bids, to provide the needed product or service. The purpose of the RFP is to find the best product or service at the best price, based on agency requirements.

The team seeking products or services for its agency can use this tool as a guide to create the actual RFP document to which data system vendors will respond.

Instructions for RFP Tools

Module 1 contains three tools for developing an RFP. We recommend you use these tools together and follow the step-by-step process.

1. Read through 1.3: Request for Proposals — Timeline Guide to learn the necessary steps and the approximate time needed to complete each step of an RFP. Taking notes about where your agency practice may differ could be helpful.
2. Adapt and complete 1.4: Request for Proposals — Timeline Template, which will be based on information gained by reading the Timeline Guide and your agency policies.
3. Use this timeline to complete 1.5: Request for Proposals — Template. This will be the document you send to prospective vendors.


## Tips for Developing Your RFP

* Use clear and concise language to ensure potential vendors understand your data system requirements.
* Provide a designated period of time when vendors are allowed to ask you questions. This provides an opportunity to clarify their understanding of the RFP, so their proposals can realistically meet your system requirements.
* Include, at a minimum, the basic requirements and use of the software; a realistic timeline for completion; and a reasonable budget for the package, training, and maintenance.
* Propose a reasonable timeline for implementation, ranging between 3 to 6 months for a COTS and 6 to 12 months for a fully customized system. Timeline and budget may be the most difficult to gauge at the outset of the data system development process. Establishing a budget too small or a timeline too short will likely prevent good vendors from submitting proposals.

## Getting the Right Vendors

### Vendor Experience

* Ask for vendors who have experience developing systems similar in scope to the one you want.
* Ask for vendors who have experience working with tribes.
* Ask vendors to provide relevant references and system examples.

### Vendor Demonstrations

* Ask vendors to provide a demonstration of their products and capabilities.
* Ask vendors to demonstrate specifically how they can address your requirements.

### Vendor Capabilities

* Ask vendors to explain the scope of their capabilities to meet your requirements.
* Ask vendors to state if outside subcontractors or services are required. (E.g., Do they use outside vendors for technical support?)
* Are outside vendors used for software hosting?

## Clarifying Roles and Expectations

Vendors may respond to your RFP expecting you to have certain in-house technical capabilities or time available to develop the data system. Clear expectations between the vendor and your agency are important for both the development and maintenance of the data system.

### Expectations of Vendor

* How frequent will the vendor and agency meet?
* What technical assistance will be provided to the agency?
* What is the expected timeline for development?
* What are the itemized costs for development and maintenance?

### Expectations of Agency

* How many members from the agency team are needed to develop the data system, and how much of their time is required?
* What staff technical capabilities are required to operate the data system?
* Is the agency expected to have a data system manager?
* What, if any, ongoing expenses will be incurred by the agency? What services will be covered by these costs?

# Sections of the Template

Request for Proposals – Template Section. The first three pages can be used as a template to write an RFP for a data system. Enter your agency information where there are yellow highlighted sections. The use of this template is voluntary, and your agency may already have documents that serve this purpose.

Vendor Response Section. These questions should be an attachment to the RFP where each vender will provide a response. The agency will then use the vendor responses to review proposals, plan the system demonstrations, and make a final selection. The agency should review the list of questions to ensure it includes the requirements for a data system.

Vendor Response Instructions Section.This section is for internal use only and includes a description of each item from the vendor response section to assist with understanding the types of responses the vendors should submit on their proposals.

# [Agency Name] Request for Proposals

## Purpose and Scope

[Agency Name] is currently accepting proposals for the selection and implementation of and training for a data system. This data system will be used for [list specific actions for which the data system will be used]. The business/functional requirements of the system will be modeled after a basic framework, and specific forms and data elements will be defined by the [Agency Name] team.

As part of the selection process, this Request for Proposals (RFP) is being provided to a small number of vendors for a data system that best meets the requirements of this agency, with the least amount of customization and at a reasonable cost.

## Schedule of Activities

The following schedule outlines the approximate timeframe of the planned events (subject to change): [Insert the specific Agency timeline dates from the “Request for Proposal - Timeline” document.]

* Release the RFP Start Date (Month, Day, Year)
* RFP Responses 1 Month (Month, Day, Year)
* Response Evaluation 1 Month (Month, Day, Year)
* Product Demonstrations 2 Weeks (Month, Day, Year)
* Vendor Selection 1 Week (Month, Day, Year)
* Implementation Plan Development 2 Weeks (Month, Day, Year)
* Finalize Contracts 1 Week (Month, Day, Year)
* Implementation and Training 1 Year (Month, Year)

## Evaluation and Product Demonstration

The responses to this document will be used to identify the top two vendors who will be asked to provide a product demonstration (onsite or Web based). These vendors will be notified on [1 week prior to the “Conduct Product Demonstrations” end date].

Production demonstration times will be

[Provide possible time slots on which the team has already decided, e.g., Monday, March 6 between 9 a.m. to 11 a.m. and Wednesday, March 8 between 1 p.m. to 3 p.m.]

## Selection

After the Schedule of Activities are completed, a product and vendor will be selected, and a final agreement will be negotiated to cover the following items:

* Application Software and Licensing
* System Configuration (hardware and software)
* Customizations and Modifications
* Data Conversion
* Implementation Planning (including a work plan, data conversion plan, and technical training plan)
* Technical Training
* On-Going Support and Maintenance
* Hosting Fees

## Response Requirements and Conditions

### Response Submittal Date

Completed RFP responses must be emailed to [Agency Contact Person] by [Deadline Date and Time, e.g., month, day, year, by midnight].

### Document Format and Question Responses

Documents are preferred in Microsoft Word or Excel formats. Generally, the key requirements are represented by questions (attached) intended to solicit one of the following responses:

Yes The current production release of the software provides this feature without modification and can be demonstrated on request.

No This feature is not provided or planned. Include workarounds or alternative approaches in the comment column.

Planned This feature is planned for inclusion in a scheduled future release. Provide an estimated release date.

Mod The system could be modified to provide this capability. Indicate the type of modification involved – major, moderate, or minor.

Comments Include any clarifying or explanatory comments. For questions where the response is not yes, no, planned, or mod, indicate the vendor response on the comments column.

Answers to questions should be complete. For example, if a specific feature can be met by using an add-on module, then the cost estimate should include the add-on module.

### Contact

All questions or requests for additional information regarding this RFP are to be directed to—

[Agency Contact Person] Project Manager

Email: [Agency Contact Person’s Email Address]

Phone: [Agency Contact Person’s Phone Number]

## Project Background Information

[Background of previous systems used, reason for the need of a new system, work that has already been completed, any current project plan that may be in place, etc.]

## Funding for Vendor Selection

The contract will be issued and paid by the agency, [Agency Name]. The ongoing maintenance, hosting, licensing, and all other associated fees incurred post implementation are the responsibility of [Agency Name].

## Current Operating Environment (Systems)

### Server Hardware/Software

Agency servers typically have the following hardware and software configuration:

[Standard server hardware and software configuration]

### Workstation Hardware/Software

Computer desktop configuration typically includes laptops, desktops, and tablets with the following hardware and software configuration:

Desktop

[Standard desktop hardware and system configuration]

Laptop

[Standard laptop hardware and system configuration]

Tablet

[Standard desktop hardware and system configuration]

# Vendor’s Response

The vendor’s response to the RFP, the proposal, will remain in effect for 90 days from the final submission date, [*Date*]. For questions where the response is not yes, no, planned, or mod, please indicate the vendor response in the comments column.

The agency reserves the right to reject any or all proposals. [Agency Name] may enter into negotiations with any vendor(s) in its sole discretion, as it may choose. The review procedure will continue until a vendor is selected successfully or until [Agency Name] chooses to reject all proposals. [Agency Name] also reserves the right to address more than one contract, should specific requirements be identified.

[Agency Name] reserves the right to issue amendments to the RFP at any time.

[Agency Name] reserves the right to award no contract as a result of this RFP or to award a contract for any portion of the intended work.

As a result of the selection of a vendor to supply products and/or services to [Agency Name], the vendor agrees to make no reference about [Agency Name] in any literature, promotional material, brochures, sales presentations, or the like without express prior written consent from each entity.

| Reference | Response |
| --- | --- |
| 1. Data System Vendor
 |  |
| * 1. Name, address, and telephone number of the data system vendor
 |  |
| * 1. Type of business organization (e.g., public corporation, private corporation, partnership)
 |  |
| * 1. Number of years of experience with case management systems
 |  |
| * 1. Number of years of experience working with tribal agencies
 |  |
| * + 1. Summary of previous data system work with tribal agencies
 |  |
| * 1. Name and title of the person authorized to execute a contract on behalf of the vendor
 |  |
| * 1. Is there pending litigation against the vendor?
 |  |
| * + 1. If so, please summarize.
 |  |

| Requirements | Response |
| --- | --- |
| 1. Software Requirements
 |  |
| * 1. Infrastructure
 |  |
| * + 1. Which database does the system support? Please indicate version and release number where applicable.
 | Comments: |
| * + 1. Which server operating system, network, and hardware do you support?
 | Comments: |
| * + 1. Which desktop operating systems (Windows versions) are fully compatible with the software?
 | Comments: |
| * + 1. Describe briefly the recommended technical architecture of the system and any tools used. For example, is the database run on a separate server from the application?
 | Comments: |
| * 1. Security
 | Yes | No | Planned | Mod | Comment |
| * + 1. Does the system have privileged accounts?
 |  |  |  |  |  |
| * + 1. Describe your support for security patches (most often Microsoft Security).
 | Comments: |
| * 1. Technology
 | Yes | No | Planned | Mod | Comment |
| * + 1. Does the system use per seat licenses or concurrent licenses?
 |  |  |  |  |  |
| * + 1. Does the system provide the capability so only authorized users can access the system?
 |  |  |  |  |  |
| * 1. Interfaces
 | Yes | No | Planned | Mod | Comment |
| * + 1. Does the system support a Web interface that can be customized?
 |  |  |  |  |  |
| * + 1. Does the system support a thick or thin client interface that can be customized?
 |  |  |  |  |  |
| * + 1. Does the system provide a security administration interface?
 |  |  |  |  |  |
| * + 1. Does the system provide a reporting interface?
 |  |  |  |  |  |
| * + 1. Does the system support a report customization and development interface?
 |  |  |  |  |  |
| * 1. Business Logic
 | Yes | No | Planned | Mod | Comment |
| * + 1. Security Administration
 |  |  |  |  |  |
| * + - 1. Can user security be managed using groups?
 |  |  |  |  |  |
| * + - 1. Does the system provide the ability to define access into discrete functions?
 |  |  |  |  |  |
| * + 1. Reporting Interface
 |  |  |  |  |  |
| * + - 1. Does the system provide standard reports? Please provide a list of standard reports available with the system.
 |  |  |  |  |  |
| * + 1. Report Administration
 |  |  |  |  |  |
| * + - 1. Can authorized users modify and customize report outputs?
 |  |  |  |  |  |
| * + - 1. Can the reporting tool access all tables and data relationships in the database?
 |  |  |  |  |  |
| * + - 1. Is the reporting tool a proprietary product?
 |  |  |  |  |  |
| * + - 1. Is the system bundled with any third-party report writers or query tools? If so, which ones?
 |  |  |  |  |  |
| * 1. Functional Areas
 | Yes | No | Planned | Mod | Comment |
| * + 1. Does the system support user defined fields?
 |  |  |  |  |  |
| * + 1. Does the system track the following data elements?
 |  |  |  |  |  |
| * + - 1. Data Element One (Required)
 |  |  |  |  |  |
| * + - 1. Data Element Two (Valid Value List preferred)
 |  |  |  |  |  |
| * + - 1. Data Element Four (Valid Value List preferred)
 |  |  |  |  |  |

| Reference | Response |
| --- | --- |
| 1. Implementation and Customization
 |  |
| * 1. Based on the requirements outlined in this RFP, if any modifications are required, who will perform them?
 |  |
| * 1. When a new version of the packaged software is released, what is required to support these modifications? Whom do you propose to support the reintegration of modifications?
 |  |
| * 1. How should the system users be trained? For example, do you have scheduled training classes? If so, where are they held? Do you offer onsite training? Web-based training? Note: Please include the cost of proposed training in the cost estimate
 |  |
| * 1. Please describe the proposed approach to data conversion.
 |  |
| * 1. How long does it take to implement the proposed system, including set up, training, and data conversion?
 |  |
| * 1. Please state any assumptions. If you are proposing modifications to meet any of the functional requirements, please include the time required to design, develop, and test these modifications.
 |  |
| 1. Maintenance and Support
 |  |
| * 1. What support options are available? For example, remote dial-in support (please indicate technical requirements if applicable); toll-free telephone number (please provide hours of support and callback response policies); Internet support or Web self-help; and Web incident reporting and tracking.
 |  |
| * 1. Do you provide your customers with information about currently known system/software issues or a defect list for the software?
 |  |
| * 1. How are defects handled? (reported, escalated, and resolved)
 |  |
| * 1. When you release upgrades to your software, who installs the upgrade and what is the average effort involved in upgrading the software to the latest version?
 |  |
| * 1. How is the annual maintenance fee calculated?
 |  |
| * 1. What is included in the annual maintenance fee?
 |  |
| * 1. What type of support is NOT included in the annual maintenance fee and is it charged separately?
 |  |
| * 1. What is your warranty policy?
 |  |
| 1. References
 |  |
| * 1. Reference 1
 |  |
| * + 1. Name of Organization
 |  |
| * + 1. Name of Reference Contact
 |  |
| * + 1. Position
 |  |
| * + 1. Telephone number
 |  |
| * 1. Reference 2
 |  |
| * + 1. Name of Organization
 |  |
| * + 1. Name of Reference Contact
 |  |
| * + 1. Position
 |  |
| * + 1. Telephone number
 |  |
| * 1. Reference 3
 |  |
| * + 1. Name of Organization
 |  |
| * + 1. Name of Reference Contact
 |  |
| * + 1. Position
 |  |
| * + 1. Telephone number
 |  |
| 1. Costs
 |  |
| Attach a cost proposal for this implementation based on the information provided in this RFP. Include all components required to meet the functionality included in this RFP. The cost estimate should include software, training, implementation, data conversion, and modifications. State any assumptions made in developing the estimate. Contact [Project Lead] with any questions that need to be answered to develop a cost estimate. Attach any supporting documents as needed. |

| Description | One Time Fees | Annual Maintenance and Support Fees |
| --- | --- | --- |
| 1. Software Licenses and Maintenance
 |  |  |
| * 1. Please provide contract samples (licensing, maintenance, and or support).
 |  |  |
| * 1. Please describe the licensing structure (Web enabled, per seat basis, site, etc.).
 |  |  |
| 1. Other Licenses and Maintenance
 |  |  |
| * 1. Operating system
 |  |  |
| * 1. Database software
 |  |  |
| * 1. Reporting tools
 |  |  |
| * 1. Other
 |  |  |
| 1. Implementation Services (Please note any variable costs.)
 |  |  |
| * 1. Setup costs
 |  |  |
| * 1. Data Conversion costs
 |  |  |
| * 1. Training costs
 |  |  |
| * 1. Customization costs
 |  |  |
| 1. Other Costs
 |  |  |
|  |  |  |
| TOTALS |  |  |

## Vendor Response Instructions

This Vendor Response Instructions section is for internal agency use only and will provide an in-depth description of items included in the RFP and example questions asked of the proposed vendors. The agency reviews the questions with its internal technical team prior to releasing the RFP to determine which questions are applicable to its request. Posing a standard set of questions to all respondents is important for consistency.

| Reference | Description |
| --- | --- |
| 1. Data System Vendor
 | This section covers general demographic information on the vendor and his/her company. This information may be important when looking at cost of travel, years of actual experience with data systems, with whom you would be negotiating if there are ever any contract disputes, etc. |
| * 1. Name, address, and telephone number of the data system vendor
 |
| * 1. Type of business organization (e.g., public corporation, private corporation, partnership)
 |
| * 1. Number of years of experience with case management systems
 |
| * 1. Number of years of experience working with tribal agencies
 |
| 1.4.1. Summary of previous data system work with tribal agencies |
| * 1. Name and title of the person authorized to execute a contract on behalf of the vendor
 |
| * 1. Is there pending litigation against the vendor?
 |
| * + 1. If so, please summarize.
 |

| Requirements | Description |
| --- | --- |
| 1. Software Requirements
 | This section gives technically specific software requirements about the new data system. When evaluating vendor responses, the recommendation is to have an internal-agency technical person review the responses. |
| * 1. Infrastructure
 |  |
| * + 1. Which database does the system support? Please indicate version and release number where applicable.
 | The vendor indicates what type of database platform on which the data system is based. (E.g., Is it built with SQL, Oracle, etc.? |
| * + 1. Which server operating system, network, and hardware do you support?
 | The vendor indicates the type of operating system, network, and hardware the data system supports. For example, is it hosted on the cloud or on a physical server? Will the data system work on a private computer, a Mac, a tablet?  |
| * + 1. Which desktop operating systems (Windows versions) are fully compatible with the software?
 | The vendor indicates whether the data system will work on Windows, Mac, etc.  |
| * + 1. Describe briefly the recommended technical architecture of the system and any tools used. For example, is the database run on a separate server from the application?
 | The vendor indicates what type of technical environment is used for the data system (e.g., example, ASP.NET (C#), UNIX, LINUX, Windows with a SQL server) |
| * 1. Security
 |  |
| * + 1. Does the system have privileged accounts?
 | The vendor indicates whether there will be special access into the “back-end” of the system. This type of access would allow an internal-agency person access to the raw database and the ability to make programming updates. |
| * + 1. Describe your support for security patches (most often Microsoft Security).
 | The vendor indicates how he/she will ensure the agency receives the most recent security updates. Will these “patches” be automatically installed or “pushed” to the data system quarterly or yearly? How will the patches work? Will the vendor’s team need to come onsite, or is the service provided remotely? Is there an extra cost associated with updates, or is it incorporated in the monthly/yearly fees? |
| * 1. Technology
 |  |
| * + 1. Does the system use per seat licenses or concurrent licenses?
 | Per seat license means each person using the system requires his/her own license. Concurrent license means there is a limited number of people who can be working on the data system at one time. The vendor should indicate which types of licenses are issued. |
| * + 1. Does the system provide the capability for only authorized users to access the system?
 | The vendor describes how to manage user security. For example, can the supervisor see all his/her assigned worker’s cases? Can an agency technical person get access to cases? How would the agency create a new user and decide what sort of security to give? |
| * 1. Interfaces
 |  |
| * + 1. Does the system support a Web interface that can be customized?
 | The vendor indicates whether the system uses a Web-based interface for the workers. He/she should also indicate whether the agency can decide what the Web-based user login will look like. |
| * + 1. Does the system support a thick or thin client interface that can be customized?
 | A thin client interface means there is little to no software that needs to be installed on a worker’s computer. Thin interfaces tend to lack customizable interfaces. A thick client interface is more often maintained by the agency, so it can be customized. The vendor should indicate which interface is used, and how it can be customized. |
| * + 1. Does the system provide a security administration interface?
 | The vendor indicates whether he/she provides a security administration interface used by the internal agency technical team to make security changes to the data system. For example, the supervisors require the ability to access ALL cases in the system, not just the cases assigned to their workers. Can the agency make this change internally? |
| * + 1. Does the system provide a reporting interface?
 | A reporting interface allows the agency to generate reports based on agency requirements. The vendor should indicate whether this interface has been created, it is in planned development, or it does not exist. |
| * + 1. Does the system support a report customization and development interface?
 | A report customization and development interface allows the agency to create specialized reports that are agency and program specific. The vendor should indicate whether this interface has been created, it is in planned development, or it does not exist. |
| * 1. Business Logic
 |  |
| * + 1. Security Administration
 |  |
| * + - 1. Can user security be managed using groups?
 | The vendor indicates whether security groups can be created; for example, the home visitor staff is one group, supervisors a second group, and agency executives a third group. Each group should have different security settings (e.g., example, the executive group should only have access to general demographic information on a client, not full access to a case or the ability to add contacts or information). |
| * + - 1. Does the system provide the ability to define access into discrete functions?
 | The vendor indicates whether specific security settings can be applied to different programs. For example, the data system will be shared with a counseling center. Can the workers in the counseling center have access to only their notes on a specific case and be restricted from access to the home visitor’s notes? |
| * + 1. Reporting Interface
 |  |
| * + - 1. Does the system provide standard reports? Please provide a list of standard reports available with the system.
 | The vendor indicates whether the data system comes standard with a specific report set; for example, a case count with a breakdown of services being provided to each family. |
| * + 1. Report Administration
 |  |
| * + - 1. Can authorized users modify and customize report outputs in this system?
 | The vendor indicates whether there is a way for agency staff to make updates and changes to existing reports. For example, the vendor provides a standard report of a simple case count. The agency technical staff would like to add more specific information, like a list of services to which each case has been referred. Is this possible? |
| * + - 1. Can the reporting tool access all tables and data relationships in the database?
 | The vendor indicates if there are any limitations to the reporting tool and describes, in specifics, any data that could not be reported and why. |
| * + - 1. Is the reporting tool a proprietary product?
 | The vendor indicates whether the reporting tool is proprietary to his/her company. This may affect how easy it is for the agency to change reports internally.  |
| * + - 1. Is the system bundled with any third-party report writers or query tools? If so, which ones?
 | The vendor indicates whether he/she designs reports using a third-party tool like Crystal Reports. This may allow the agency to train staff internally to create or update reports after implementation. |
| * 1. Functional Areas
 |  |
| * + 1. Does the system support user-defined fields?
 | The vendor should indicate whether the data system can be configured for agency specific data elements. |
| * + 1. Does the system track the following data elements?
 | The vendor should indicate whether the data elements listed below are currently captured. |
| * + - 1. Data Element One (Required)
 | The following should be decided and completed by the agency. The data elements should be general data elements captured for every case; for example, Mother’s Date of Birth and Full Name. |
| * + - 1. Data Element Two (Valid Value List preferred)
 | The agency can also select data elements that consist of valid values; for example, telephone type would be home, cell, or work. |
| * + - 1. Data Element Three (linked to…)
 |
| * + - 1. Data Element Four (Valid Value List preferred)
 |

| Reference | Response |
| --- | --- |
| 1. Implementation and Customization
 |  |
| * 1. Based on the requirements outlined in this RFP, if modifications are required, who will perform them?
 | The agency indicates whether its requests put forth in the RFP document will require any modifications to the vendor’s current product. |
| * 1. When a new version of the packaged software is released, what is required to support these modifications? Whom do you propose will support the reintegration of modifications?
 | The vendor should indicate how and what the plan is for making any required modification(s) and how it will be done. He/she should also state who will make those changes and how they will be implemented. |
| * 1. How should the system users be trained? For example, do you have scheduled training classes? If so, where are they held? Do you offer on-site training? Web-based training? Note: Please include the cost of proposed training in the cost estimate
 | The vendor should indicate whether he/she uses a standard training plan. |
| * 1. Please describe the proposed approach to data conversion.
 | If the agency has selected to do data conversion, then the vendor should indicate what the plan is for completing the conversion from existing data into the new system. |
| * 1. How long does it take to implement the proposed system, including set up, training, and data conversion?
 | The vendor should indicate what the standard timeline is for implementation, training, and data conversion (if applicable). |
| * 1. Please state any assumptions. If you are proposing modifications to meet any of the functional requirements, please include the time required to design, develop, and test these modifications.
 | The vendor should indicate if any assumptions are being made in response to the proposal. |
| 1. Maintenance and Support
 |  |
| * 1. What support options are available? For example, remote dial-in support (please indicate technical requirements if applicable); toll-free telephone number (please provide hours of support and callback response policies); Internet support or Web self-help; and Web incident reporting and tracking.
 | The vendor should indicate how support is provided after implementation. |
| * 1. Do you provide your customers with information about currently known system/software issues or a defect list for the software?
 | The vendor should indicate any known issues that are currently being addressed on the data system. |
| * 1. How are defects handled? (reported, escalated, and resolved)
 | The vendor indicates the plan for handling issues the agency may find in the system. |
| * 1. When you release upgrades to your software, who installs them and what is the average effort involved in upgrading the software to the latest version?
 | The vendor indicates how upgrades function in the data system. The agency should consider costs associated with vendor upgrades, and what role the internal technical staff of the agency will have during this process. |
| * 1. How is the annual maintenance fee calculated?
 | The vendor indicates the breakdown of the annual maintenance fee, and what are the total associated costs. |
| * 1. What is included in the annual maintenance fee?
 | The vendor indicates what services are provided for the annual maintenance fee. |
| * 1. What type of support is NOT included in the annual maintenance fee? Is there a separate charge for this support?
 | The vendor indicates common fees associated with the data system that are NOT covered by the annual maintenance fee. |
| * 1. What is your warranty policy?
 | The vendor should indicate whether a warranty policy exists. If it does, the details of the policy should be described. |
| 1. References
 | The vendor lists the contact information for the appropriate number of references as requested by the agency. |
| * 1. Reference 1
 |
| * + 1. Name of Organization
 |
| * + 1. Name of Reference Contact
 |
| * + 1. Position
 |
| * + 1. Telephone number
 |
| * 1. Reference 2
 |
| * + 1. Name of Organization
 |
| * + 1. Name of Reference Contact
 |
| * + 1. Position
 |
| * + 1. Telephone number
 |
| * 1. Reference 3
 |
| * + 1. Name of Organization
 |
| * + 1. Name of Reference Contact
 |
| * + 1. Position
 |
| * + 1. Telephone number
 |
| 1. Costs
 |  |
| Please attach a cost proposal for this implementation based on the information provided in this RFP. In the cost proposal, include all components required to meet the functionality included in this RFP. The costs should include all software costs, training, implementation, data conversion, and modifications. State any assumptions made in developing the cost estimate. Contact [Project Lead] with any questions that need to be answered to develop an estimate. Attach any supporting documents as needed. |

| Description | Description |
| --- | --- |
| 1. Software Licenses and Maintenance
 |  |
| * 1. Please provide contract samples (licensing, maintenance, and or support).
 | The vendor should provide the agency with examples of the contracts used. |
| * 1. Please describe the licensing structure (Web enabled, per seat basis, site, etc.).
 | The vendor should describe the types of licenses used for the data system and the costs. |
| 1. Other Licenses and Maintenance
 |  |
| * 1. Operating system
 | The vendor should indicate the cost of the operating system.  |
| * 1. Database software
 | The vendor should indicate the cost of the database software for the data system. |
| * 1. Reporting tools
 | The vendor should indicate the cost of any reporting tools to be used. |
| * 1. Other
 | The vendor should indicate any other costs associated with the data system. |
| 1. Implementation Services (Please note any variable costs.)
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| * 1. Setup costs
 | The vendor should indicate any costs associated with initial data system setup. |
| * 1. Data Conversion costs
 | The vendor should indicate any costs associated with data conversion. |
| * 1. Training costs
 | The vendor should indicate any costs associated with training on the data system. |
| * 1. Customization costs
 | The vendor should indicate any costs associated with customization of the system. |
| 1. Other Costs
 | The vendor should indicate any other costs that may be associated with the data system. |
| TOTALS | Total cost for Implementation Services. |