

# 1.3: Request for Proposals – Timeline Guide

A **Request for Proposal** (RFP) is a document created when an agency determines it would like to contract with an external business, vendor, consultant, or supplier for a specific product or needed service. Typically, an RFP is used to announce funding has been made available for a particular 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.

## Instructions for RFP Tools

Module 1 contains three tools for developing a 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.

## Suggested Timeline

### ▶ Release the RFP – Start Date

- RFP release date is the Start Date for the timeline.
- The agency identifies a project lead and members of an internal review team. When choosing members for the review team, consider individuals who understand the established internal processes for releasing and reviewing an RFP, are knowledgeable of the data system requirements, and may have experience requesting and receiving bids for a data system.
- Create the RFP document with details about the agency, the RFP process, and the required product or service.
- See the “RFP Requirements Template” as a resource and an example of what to include.
- Determine the method of release. An RFP can be released in a variety of ways—mailed directly to hand-selected vendors, promoted on a temporary Web site created specifically for the project, or posted as an announcement to a notice board. Depending on the required product or service, determine which method of release would be most appropriate to reach potential businesses or vendors. Your agency may have experience working with vendors; or as a starting place for identifying potential vendors, you may want to contact other programs/agencies for recommendations. In addition, you may want to consult the 1.2: Scan of COTS.

### ▶ RFP Responses – 1 Month

- The deadline for responses to be returned is approximately 1 month from the Start Date.
- In the RFP, it is important to designate a time for “a period of questions” between the RFP Start Date and the deadline. A period of questions is a designated time in which vendors are allowed to ask questions of the organization releasing the RFP, also known as the solicitor. This is an opportunity for vendors to clarify their understanding of the RFP to ensure their proposals are targeted to realistically meet your needs.
- Following the period of questions, all vendors submit the completed documents to the designated project lead by midnight on the deadline date.
- Proposals are reviewed for missing information.

### ▶ Response Evaluation – 1 Month

- The review process for responses takes approximately 1 month from the deadline.
- The project lead prints and gathers all proposals to create binders for each member of the review team.

- The review team makes an action plan for proposals missing information (e.g., automatic disqualification, a certain number of days to respond to a request for the missing information).
- The internal review is completed in approximately 1 month.
- Requesting a product demonstration from potential vendors is common.
- Once the top candidates (vendors) have been selected by the review team, they are given at least a 1-week notice before requesting a product demonstration.

▶ **Product Demonstrations – 1 Week**

- All demonstrations are conducted shortly after the completion of the internal review and last approximately 1 week.
- Verify agenda, date, time, and necessary equipment with all vendors.
- Ensure equipment necessary for the vendor demonstrations are available and in working order.
- Use the Vendor Response section of the “RFP Requirements Template” as a guide for building the agenda. Request the vendors demonstrate the key features of their data systems described in the RFP.

▶ **Vendor Selection – 1 Week**

- Once demonstrations are completed, the internal review team discusses the original RFP and notes/summaries from the production demonstration.
- The final selection is completed within 1 week.
- Once a selection is made by the review team, notify the vendor of the official selection at least 1 week prior to the start of the implementation plan development.
- Notify the individuals or companies not selected.

▶ **Implementation Plan Development – 2 Weeks**

- An agency project team is created to oversee the remainder of the data system planning and implementation process. The project team may or may not have the same members as the review team.
- The development of the implementation plan will begin with a scheduled kick-off meeting which takes approximately 2 weeks.
- The project team and vendor schedule the kick-off implementation meeting as soon as possible.
- The project team and vendor develop an implementation plan with measurable product deliverables, timelines, milestones, trainings, and a plan for project closure.

▶ **Finalize Contracts – 1 Week**

- Once the implementation plan is created and agreed upon by all parties, the final contracts for work are signed within 1 week.
- All contracts are reviewed for accuracy and completeness by the project team and appropriate agency personnel.

▶ **Implementation and Training – 1 Year**

- A data system implementation plan and the training can be completed within 1 year of contract signing. However, this must be decided on a case-by-case basis, and the project team decides on the completion date.
- The project team schedules regular status meetings with vendor management and team throughout implementation.
- The vendor updates the implementation plan with progress and completed project milestones.
- The vendor supplies the project team with status documentation (e.g., status reports, updated implementation plan) according to a schedule set by the project team.

Additionally, the vendor is available to provide input and assistance throughout the development of the implementation plan, including meeting with project team members during on-site visits and conference calls and during the actual implementation and training phases.