**RFN**

**Request for Needs**

**NAME OF OWNER ORGANIZATION**

**NAME OF DEPARTMENT / USER GROUP**

**RFN ###**

**Referenced to RFP ###**

**Name of Project**

**RFN Issued Date: June 30, 2017**

**Deadline for RFN Response: July 26, 2017**

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**SECTION 1: RFN OVERVIEW**

THE OWNER is issuing this Request for Needs (RFN) to obtain feedback from Software Vendors with experience in providing the following services:

<<<Insert summary paragraph of the Scope>>>

***A full draft Scope of Work is provided in the APPENDIX A of this RFN. Interested Software Vendors are requested to review the draft Scope of Work and then answer the questions listed in Section 4 RFN Response Form.***

**PURPOSE OF THE RFN**

The purpose of this RFN is to engage feedback from interested Software Vendors regarding THE OWNER’s Scope of Work for the project. THE OWNER is interested in providing a comprehensive, accurate, and up-to-date Scope of Work. THE OWNER also intends the Scope of Work to include pertinent background data and information that enables Software Vendors to prepare an accurate proposal.

**HOW THE OWNER WILL USE RESPONSES FROM PARTICIPATING SOFTWARE VENDORS**

The information obtained from this RFN will be used to develop the final Request for Proposal (RFP) for this project.

THE OWNER intends to answer all scope-related questions that Software Vendors submit, within reason, within the final RFP. All questions and information requests will be listed in the final RFP scope of work along with THE OWNER’s respective answer. Any questions/requests THE OWNER is unable to fulfil will be clearly indicated in the final RFP. The intent is to answer as many questions/requests as possible in an effort to reduce uncertainty in the final RFP scope of work.

THE OWNER intends to consider other scope-related recommendations that Software Vendors submit for inclusion within the final RFP. The intent is to understand whether THE OWNER’s scope is reasonable and realistic, then make appropriate adjustments if needed. All consideration of scope-related recommendations will be determined in THE OWNER’s sole discretion. However, THE OWNER intends to establish a fair, level playing field within the final RFP scope of work that does not unnecessarily exclude Software Vendors from competing in the RFP stage.

***A response to this RFN is NOT mandatory in order to participate in the future RFP.***

**SECTION 2: NOTICE OF INFORMATION SESSION**

THE OWNER will host an Information Session on:

**DAY, MONTH, DATE, YEAR**

**TIME, TIME ZONE**

**BUILDING NAME**

**ROOM ##**

**ADDRESS**

**CITY, STATE ZIPCODE**

Please note that ***in-person attendance is strongly preferred.***

GoToMeeting/AdobeConnect/Skype/Videoconference/Teleconference link is also available at the following coordinates:

...................................................................................................................................

Insert as needed

...................................................................................................................................

The agenda of the Information Session will include:

1. Review of the RFN
2. Discussion of the draft Scope of Work and Q&A with attending Software Vendors.
3. Discussion of the anticipated RFP release date, procurement timeline, and evaluation process.
4. Introduce a unique procurement approach that THE OWNER will utilize for the RFP process. The information session will provide an overview of the upcoming RFP process, which is unique in that it emphasizes: (a) each competing Software Vendor’s operations personnel, (b) their implementation plan and assessment of potential risk factors (specific to THE OWNER), and (c) product demonstrations.

***\*Note: Software Vendors are strongly encouraged to send members of their operations team to this Information Session (rather than only sending Business Development, Marketing, and/or Sales representatives)***

**SECTION 3: RFN INSTRUCTIONS**

**SUBMISSION REQUIREMENTS**

Interested Software Vendors should submit their RFN responses via email (in Word document format) to the Point of Contact listed below. **RFN response are required to follow the format and page limitations contained in Section 4**. Please limit responses to the required page limits and formats specified for each question of Section 4. Submissions that do not adhere to these requirements will not be considered. Do not provide any additional or supplemental information (such as brochures, handouts, etc).

**Point Of Contact**

All questions, inquires, or communications regarding this RFN must be directed to the Point of Contact listed below. No communications shall be directed to other personnel from THE OWNER.

**Brian Lines**

[**brianlines@ku.edu**](mailto:brianlines@ku.edu)

**785-864-6503**

**GENERAL INFORMATION**

THE OWNER does NOT plan to share the RFN responses from Software Vendors nor make any responses public; however, Software Vendors are **discouraged** from submitting trade secrets or confidential information. THE OWNER takes no responsibility for the accuracy or completeness of information supplied in this RFN and will not be responsible for costs incurred in responding to this RFN.

**DUE DATE**

Time Table for Responses:

|  |  |
| --- | --- |
| Issue Date of RFN | June 30, 2017 |
| Information Session | July 12, 2017 |
| Deadline for Questions | July 17, 2017 by 2:00 p.m. Central |
| Deadline for Issuing Addenda | July 20, 2017 by 5:00 p.m. Central |
| Submission Date | July 26, 2017 by 2:00 p.m. Central |

**SECTION 4: RFN RESPONSE FORM**

***Please respond to the questions in this section. You are encouraged to be open & candid in your responses.***

1. **Is the Scope (as drafted in APPENDIX A) realistic and achievable? If not, what changes you would recommend and why?**

**(Please indicate Yes/No to the questions listed below)**

|  |  |  |
| --- | --- | --- |
| A | The anticipated procurement schedule shown in APPENDIX A is reasonable | Yes / No |
| B | The draft Scope of Work provided in APPENDIX A is clear for Software Vendors to prepare an accurate proposal with minimal cost contingency. | Yes / No |
| C | The description of THE OWNER’s existing/current systems, documents, templates, and procedures is clear. | Yes / No |
| D | The roles and responsibilities of the selected Software Provider are clear regarding the initial discovery and implementation phases of the project. | Yes / No |
| E | THE OWNER is planning to interview the following individuals during the RFP Evaluation stage. The intent is to interview the key personnel from each Software Vendor’s project team that would be assigned to work with THE OWNER.  Are these the most critical project team roles?   * Project Manager * Technical Lead * Product Manager * Integration Lead | Yes / No |
| F | A site walk is necessary at the RFP stage. | Yes / No |
| G | The 90-day implementation/transition period THE OWNER has assumed is realistic. | Yes / No |
|  | Add/Subtract simple Yes/No questions as needed |  |

**If you answered “No” to any questions (A-G) listed above, please provide justification and recommended alternatives.**

**(2 pages maximum)**

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1. **What information should be included in the final Scope of Work to enable your firm to submit an accurate proposal (with minimal uncertainty and contingency included in the cost)?**

Please be as specific as possible. You are encouraged to provide a bullet point list of information requested. THE OWNER intends to fulfill as many of these requests as is possible.

**(2 Pages Maximum)**

|  |
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1. **Are there any requirements or aspects of the current Scope of Work that should be changed, adjusted, or revised? Please provide justification as appropriate.** 
   * 1. **Page maximum)**

|  |
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1. **Are there any requirements that should be added to the current scope of work? Please provide justification as appropriate.** 
   * **Note: THE OWNER is interested in adopting best practices (as opposed to a “rip-and-replace” of current practices). Are there other options, alternatives, new practices/technologies, or innovative ideas that should be considered in the Scope of Work and subsequent RFP evaluation process?**
   * **Insert descriptive bullet points as needed (i.e. to mention specific aspects/functions/technologies/functionality THE OWNER wants to assess for their SOW)**

**(1 Page maximum)**

|  |
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1. **Are there any requirements or aspects of the current Scope of Work that are too prescriptive, overly burdensome, or outside of industry norms? Provide justification as appropriate.**

**(1 page maximum)**

|  |
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1. **In general, are there any requirements that you have seen from previous owners that had the effect of limiting competition or resulting in an uneven playing field?** 
   * **THE OWNER would like to be aware of these items, with the intent that we do NOT repeat the mistakes of previous owners.**

**(1 page maximum)**

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1. **Are there specific items (internally) that THE OWNER can begin working on now to facilitate a more efficient transition/implementation once the project is awarded?**

* Bullet point lists are encouraged.
  + 1. **page Maximum)**

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1. **Based on the current Scope of Work, what is the most realistic budget allocation?**

THE OWNER has currently budgeted the following for this project, assuming ## years and ## users:

* $115,000 to $200,000 for implementation & training through total adoption
* $25,000 to $50,000 for annual license/subscription costs.

**(1 page Maximum)**

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1. **What is the best approach to evaluate cost/fee structures as a part of the proposal package?**

* Please describe your company’s typical cost categories (i.e. initial implementation and training, on-going licensing and support, customization, etc.) Clearly indicate the payment structure for each cost category (i.e. lump sum, period/duration-based, unit costs, etc.)
* What is the optimal licensing structure that should be scoped/required based upon THE OWNER’s structure and operations? (i.e. concurrent, named, combination, etc.)
* What is the minimum amount of incremental users/licenses that can be added? What is the associated cost for each incremental level of additional users? (i.e. cost of adding a single user? Five users? Twenty-five users? etc.)
* If THE OWNER were to add additional departments as software users, what pricing structure is recommended to accommodate this?

**(2 page maximum)**

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1. **THE OWNER is evaluating each of the following SCOPE AREAS. THE OWNER currently intends to release a single RFP that encompasses ALL Scope Areas. Is this the optimal approach, or should certain SCOPE AREAS be broken into separate RFPs?**

|  |  |  |  |
| --- | --- | --- | --- |
| **Scope Area** | **Historic Spend /**  **Anticipated Budget** | **Can be Combined with other Scope Areas?** | **If “Yes,” please identify they Scope Areas that can be combined** |
| SCOPE AREA 1 | $724,048.79 | Yes / No | 1, 2, 3, 4, all |
| SCOPE AREA 2 | $244,587.34 | Yes / No | 1, 2, 3, 4, all |
| SCOPE AREA 3 | $776,855.51 | Yes / No | 1, 2, 3, 4, all |
| SCOPE AREA 4 | insert | Yes / No | 1, 2, 3, 4, all |

**(1 page Maximum to provide justification)**

|  |
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|  |

1. **OPTIONAL: Please review the standard Service Agreement and Terms and Conditions appended to this RFN. Please comment on any requested modifications.**

* Note: THE OWNER should determine how much, if any, red line feedback they will accept within the RFP stage

**(1 page Maximum)**

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**APPENDIX A:**

**DRAFT Scope of Work**

This attachment provides a draft Scope of Work. THE OWNER intends to update this Scope of Work based upon feedback & questions received during the Request for Needs stage. All updates will be incorporated into the final Request for Proposal, which has an anticipated release date of mid-August.

**DRAFT OF THE ANTICIPATED SCOPE OF WORK**

**FOR THE**

**PROJECT NAME**

<<<Copy/Paste the completed Scope of Work template here>>>

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**APPENDIX B:**

**Anticipated Procurement Schedule for the Eventual RFP/RFQ**

**TARGET PROCUREMENT SCHEDULE (Subject to Change)**

Insert here