



# COMPASS CONSULTING INTERNATIONAL

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## GUIDE TO DEVELOPING A TECHNOLOGY CONSULTING SERVICES RFP

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### Introduction

A good RFP is the best way to get a good proposal. But procuring professional services is different than buying software or hardware. It is also different than contracting with a software developer, programmer, or freelance writer. The following guide outlines the key elements to be included in a Request for Proposal for technology consulting services.

Consultants generally differentiate themselves based on their:

- background and expertise;
- experience with institutions and projects like yours;
- understanding of and approach to your specific project;
- writing and presentation capabilities;
- "fit" with your institution's culture;
- independence and integrity;
- references;
- price

A good RFP will allow bidders to demonstrate their capabilities and qualifications in each of these areas. The RFP should also serve as the basis for a mutually agreed-upon scope of work and contract.

### Section 1 - General Information for the Bidder

This is background information concerning your institution plus mechanical information concerning the RFP itself and the RFP process. Subsections should include:

- A summary of the existing conditions at the institution; e.g. current student services offered.
- What are the perceived problems which have prompted this process?
- A very brief statement of what you want to accomplish.
- Who is the issuing office?
- Where should questions be directed (include phone and fax number, email addresses)?
- How many copies of the proposal do you want?
- What's the deadline for submission?
- If you want all bids to contain the same information in the same order, you should require and describe a specific bid response format and provide financial response forms as needed.

- Will bidder presentations be required? On-site? Via phone? Via video conferencing?

This section should include verbiage about explicit inclusion of the bidder's response in the contract. This section can also be useful to include statements concerning preserving bidder confidentiality.

It is important to note that while the institution's standard Purchasing terms and conditions are important, they should be put at the END of the document and not take up the first umpteen pages before giving the potential respondent even a glimpse of what the project is about!

## **Section 2 - Nature and Scope of the Project**

Describe the project in as much detail as is known.

- What is the scope of the project? What issues/problems/concerns are you trying to resolve?
- Do you want a needs assessment analysis and report?
- Will you want a Request for Proposals for services (e.g., long distance service, outsourced student billing, etc.) and/or equipment to be developed? If yes:
- Will you need assistance in bid evaluation?
- Do you want assistance with contract negotiations?
- Who will handle project management?
- What about acceptance testing?
- The bidder should provide a sample RFP table of contents.
- What other reporting will be required? Formal presentations?
- What is the required timetable for these tasks and the entire project?

## **Section 3 - Bidder Required Information**

This is where you find out about the bidder and how the bidder will approach the project. The bidder must:

- Describe its approach to the consulting tasks defined in 2 above, methodology to be used, etc.;
- Confirm its ability to meet the institution's schedule;
- Describe its background and qualifications:
  - Projects of similar size, content, and complexity;
  - Multi-vendor project experience;
  - Experience in Higher Education;
  - Years of experience;
  - Independence (not affiliated with any provider of goods or services);
  - References (include contacts, phone number, date and description of services provided);
  - List of consultants who will actually work on the project, with their resumes.
- The bidder should also have the opportunity to provide any additional information about their company and services.

## **Section 4 - Cost Data**

- What are the consulting fees for the scope of work outlined above?
- How is the fee arrived at?
- Is the fee a guaranteed flat fee based on the agreed-upon scope of work? If so, what are the per diem fees for additional work outside the planned scope?
- Does this include travel, lodging, etc.? If not, how many visits to the campus are expected, and what are the anticipated costs?
- The consultant should provide you with their standard contract, if appropriate, or, if you have a contract or standard Purchasing document that you would prefer to use, include that in your RFP for the consultant to review.