|  |  |
| --- | --- |
|  | RFP Response Template |

[Insert Company Name Here]

***template Should be completed using Section VII, Proposal Format***

RFP Title: Enterprise Document Management System

RFP # IT-DMS-2016-01-MDS

**PROPOSALS DUE:**

November 3, 2016 no later than 5:00 pmPacific Time

|  |
| --- |
| Insert  Cover Letter here |

***Proposer Information***

Company name:

Address:

Phone:

Fax:

Federal Tax Id:

Representative Name:

Title:

Address:

Phone:

E-mail:

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[3.0 Volume III: Cost Data 8](#_Toc463511979)

[4.0 Volume IV: Completed Attachment 1 and Statement of Work (SOW) 9](#_Toc463511980)

[5.0 RFP Checklist 10](#_Toc463511981)

1. Volume I: Response to Technical Requirements
   1. Executive Summary and Introduction

See RFP Section VII.3, Section 3 for instructions on content guidance and complete tables below.

[Insert Executive Summary and Introduction here.]

## Company Overview

|  |  |
| --- | --- |
|  | **Information** |
| **Company name** |  |
| **RFP Response lead/account executive name, title and contact information:** |  |
| **Industry (NAICS)** *(North American Industry Classification System)* |  |
| **Fiscal 2015 company revenue** |  |
| **Fiscal 2015 company net income** |  |
| **Headquarters Location** |  |
| **Date Founded** |  |
| **Company Ownership** *(i.e. private/public, joint venture)* |  |
| **Number of years Proposer has been providing Enterprise DMS Implementation and User Training services** |  |
| **Number of employees:**  **Total:**  **Implementation Services:** |  |
| **Service Delivery Locations in the Continental United States** |  |
| **End of Table** | |

## References

Provide at least three references of customers with comparable service.

| **Reference # 1** | |
| --- | --- |
| **Customer Name** |  |
| **Industry** |  |
| **Contact Name and Title** |  |
| **Address** |  |
| **Telephone** |  |
| **Vendor’s Project Manager Name** |  |
| **Please provide the Internet links to either the DMS service or to the courts that use the DMS service.** |  |
| **Describe how this product has become your Enterprise DMS solution.** |  |
| **End of Table** |  |

| **Reference # 2** | |
| --- | --- |
| **Customer Name** |  |
| **Industry** |  |
| **Contact Name and Title** |  |
| **Address** |  |
| **Telephone** |  |
| **Proposer’s Project Manager Name** |  |
| **Please provide the Internet links to either the DMS service or to the courts that use the DMS service.** |  |
| **Describe how this product has become your DMS solution.** |  |
| **End of Table** | |

| **Reference # 3** | |
| --- | --- |
| **Customer Name** |  |
| **Industry** |  |
| **Contact Name and Title** |  |
| **Address** |  |
| **Telephone** |  |
| **Proposer’s Project Manager Name** |  |
| **Please provide the Internet links to either the DMS service or to the courts that use the service.** |  |
| **Describe how this product has become your DMS solution.** |  |
| **End of Table** |  |

* 1. Administrative Requirements

See RFP Section VII.3, Section 4 for instructions on content.

[INSERT CONTENT HERE]

* 1. Proposed Solution Requirement Response

See RFP Section VII.3, Section 5 for instructions on content.

[INSERT CONTENT HERE]

* 1. Bidders Experience and Project Staff

See RFP Section VII.3, Section 6 for instructions on content.

[INSERT CONTENT HERE]

* 1. Business Solution Response

See RFP Section VII.3, Section 7 for instructions on content.

**Check** - Proposer has fully responded to each of the separately numbered documents in *Appendix B.*

[INSERT CONTENT HERE]

1. Volume II: Supporting Documentation

See RFP Section VII.3.1 , Section 7 for instructions on content.

[INSERT CONTENT HERE]

1. Volume III: Cost Data

See RFP Section VII.3.2, Volume III for instructions on content.  **This Volume must be submitted in a separate, sealed, and clearly identified envelope**

* 1. Cost Workbook

Appendix D, all tabs must be completed.

1. Volume IV: Completed Attachment 1 and Statement of Work (SOW)

See RFP Section VII.3.3, Volume IV for instructions on content

* 1. DMS Solution Implementation Plan

[INSERT CONTENT HERE]

* 1. DMS Migration Plan

[INSERT CONTENT HERE]

* 1. Training Plan

[INSERT CONTENT HERE]

* 1. Testing Plan

[INSERT CONTENT HERE]

**4.5 Maintenance and Support Program**

[INSERT CONTENT HERE]

1. RFP Checklist

*To prevent* *disqualification, please ensure you have included or addressed all the items below in your response.*

Included Proposer Company’s Name, Address, Telephone, and Fax numbers, and Federal identification number

Included Proposer’s representative’s Name, Title, Address, telephone, and Email Address

Volume I:

Appendix C: RFP Response Template

Title Page

Cover Letter

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Executive Summary and Introduction

Company Overview

References

Administrative Requirements (small business, DVBE)

Proposed Solution Requirements Response

All Appendices B: Completed Appendices B, System and Functional Requirements and Technical Requirements, according to the instructions listed in each of the responsive Appendix B documents

All Appendices B 04a-b, acknowledgement of materials to execute Future Options

Response to Appendix E

Bidders Experience and Project Staff Response

Project Staff CVs

Business Solution Response

Volume II:

Supporting Information

Third Party Products

Volume III:

Appendix D: Cost Work Book, according to the instructions listed in Appendix D.

Volume IV:

Appendix A: Statement of Work

Additional Documentation

Included California Seller’s permit or certification of registration

Included proof of good standing and qualification to conduct business in California

Included current business license, professional certification or other credentials

Attachment 1: Completed Attachment 1, Proposer’s Acceptance of Terms and Conditions contained in Appendix H

Attachment 2: Small Business Declaration ***only*** if you wish to participate in the Small Business Incentive.

Attachment 3: Completed Attachment 3, General Certifications

Attachment 4: Completed Attachment 4, Vendor Payee Data Record

Attachment 5: Completed Attachment 5, Bidder Declaration ***only*** if you wish to participate in the DVBE incentive

Attachment 6: Completed Attachment 6, DVBE Declaration ***only*** if you wish to participate in the DVBE incentive

Attachment 7: Completed Attachment 7, Iran Contracting Declaration

Attachment 8: Completed Attachment 8, Proposed Consultants Titles