

RFCON - Request For Consultant

<System Name>

The proposed system is of the <ERP/CRM/DW/GIS/etc.> type and meets the accepted general domestic and international standards of the IT sector as well as meeting the requirements detailed in the RFP. The proposal is being submitted, and will later be implemented, in accordance with the MethodA version that is current as of the date of the RFP.

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0. Administration

0.1 General

<full legal name of organization > (hereafter, “<organization>”) invites analysis proposals for a computerized <IT/infrastructure> system dealing with < matters that the system handles > for the purpose of <purpose of the system>.

The proposed system-analysis consultant must meet the customary professional and ethical requirements for consultancy work in general and for the domestic and international IT profession in specific, as well as the specific requirements of this RFCon. The composition and submission of the proposal must comply with the version of MethodA that is current as of the date of this RFCon, and so must the eventual performance of the work.

0.2 Definitions

The following are some essential terms for this RFCon:

- _____

For more definitions, see the accompanying Initiation document.

0.3 Work Procedures and Tools

0.3.1 Receiving the full RFCon

For the full RFCon, apply to the following address:

Name: _____
Phone: _____
Fax: _____
Postal address: _____
E-mail: _____

0.3.2 Liaison officer

The contact person authorized by <organization> to discuss all aspects of this RFCon is:

Name: _____
Phone: _____
Fax: _____
Postal address: _____
E-mail: _____

<Classification>

All communications regarding this RFCon should be sent to the above address only, in writing and in accordance with Sections 0.3.3 and 0.3.4 below.

0.3.3 Procedure for questions and clarifications

Following are the procedures for questions from bidders in advance of (or instead of) the bidders' meeting, and for answers from <organization>.

- a. The bidders are to submit their questions in writing to the address in Section 0.3.2 above by <date>.
- b. To questions submitted according to item "a" above, <organization> will provide answers at the bidders' meeting **only**; or if there is no bidders' meeting, in writing by <date>.
- c. The minutes of the bidders' meeting, including answers to all the questions, will be sent, as defined in section 0.3.1, to all the vendors who purchased or received the technical part of the RFCon.

0.3.4 Bidders' meeting

A bidders' meeting, answering questions and providing clarifications, will be held at <location> on <date> at <time>. Attendance at the meeting is <compulsory/optional>. Answers and clarifications will be available only at this meeting.

There will be no bidders' meeting. All questions and clarifications will be handled according to section 0.3.3.

0.3.5 Submission of proposals

Submit your proposal in a sealed envelope at <location>, by <date/time>. In return, you will receive an acknowledgement of proposal. Be sure to keep your acknowledgement.

0.4 The RFCon

0.4.1 Content of the RFCon

This RFCon contains —

- a. This administrative part numbered Section 0, pages <start> through <end>.
- b. The Initiation document numbered Section 1 through Section 5, pages <start> through <end>.
- c. < further material >

Responses to the above content must conform to the instructions in section 0.5 below.

0.4.2 Classification of the RFCon Components

The components of the RFCon have been given standard MethodA classifications:

<Classification>

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- Information (I)** A component included for information purposes only. The bidder is expected to attest to having read, having understood, and (if there is any question of acceptance or nonacceptance) accepting. Any remarks or reservations by the bidder must be included in the response. The bidder may add further information, but only if brief.
- General (G)** A component that can be handled with a general answer in a relatively free format. This is an “open” section in the RFCOn — a section where creative suggestions and solutions may be introduced. Nonetheless, the requirement must be clearly addressed, the principal features of the proposed solution must be emphasized, and it must be clear what exactly is being offered.
- Specific (S)** A component that requires an exact and detailed response, in a precise format as required by the RFCOn (for example, by completing a table) or in the form of a particular activity (a demonstration, for example).
- Mandatory (M)** A Go/NoGo component. A missing answer, an inappropriate answer, an unclear answer, or an ambiguous answer for this component will peremptorily disqualify the proposal.
- Not Applicable (N)** A component intentionally omitted from the RFCOn and not to be addressed. The purpose of this classification is to ensure the bidder that the omission is not a mistake.

The classification of a component applies to all its subcomponents, unless otherwise stated for the subcomponent. In other words, the classification of any component is either the classification explicitly applied to it or, if no classification is explicitly applied to it, the classification of the component hierarchically above it.

For further explanation, see the RFP kit in the Life Cycle volume of MethodA.

0.5 The Proposal (The Bidder’s Response)

0.5.1 Structure and general requirements

The proposal’s structure must match the RFCOn’s structure, point for point. For example, section 0.1 of the proposal will consist of the response to section 0.1 of the RFCOn, section 0.2 will respond to section 0.2, etc.

If a submitted proposal does not follow this structure, the proposal will be peremptorily rejected.

Responses are compulsory. It is compulsory to respond to every section, to match the structure within each section, and to match the detail within each section.

Submit the proposal in <number> copies.

No consultant may submit more than one proposal, and no consultant may be a participant in more than one proposal.

0.5.2 Responding to the Administration section

The first part of the proposal (that is, of the bidder's response) must address the administrative part (which is this section, Section 0) of the RFCOn. The proper response for each subcomponent is "Have read and understood" plus explicit acceptance, details, certifications, or future-based commitments as appropriate to the particular section.

Sections 0.4 and 0.5, for example, require only a "have read and understood" answer, whereas section 0.7 requires "have read, have understood, and accept," section 0.6 requires attached certifications, etc. Note in particular sections 0.14, 0.15, 0.17 and 0.19, which will have central importance when the proposals of consultants are evaluated.

0.5.3 Responding to the Initiation document

In the second part of the proposal, you respond to the Initiation document. This is where <organization> looks to see how the consultant perceives and understands the system and what the consultant's ideas are for developing the system's content (Analysis document, prototype, etc.)— including any remarks concerning the Initiation document. As a rule, this is an "open" section of the response, with the Initiation document classified as a General component. But the response should not be overlong and should not attempt to begin system analysis!

The bidder is encouraged to invest thought particularly in responding to the following sections of the Initiation document:

0.5.4 Responding to additional documents

0.6 Commitments and Certifications to Cover Bidding

Bidders must attach the following documents:

- a. A bank guarantee for < sum > payable to <organization>, in local currency, linked to the COL index and including VAT, effective for <number> days. The bidder will extend the term of the guarantee, upon request from <organization>, until a final decision is made as to the winner of the tender. The bidder may forfeit the guarantee if the proposal is accepted and the bidder refuses to fulfill the attendant obligations in accordance with the proposal and with the terms of this RFCOn.
- b. A non-disclosure agreement, signed as a condition for the receipt of the RFCOn document and for participating as a bidder.

- c. Government certificates attesting to valid methods of accounting and to VAT and income tax registration.
- d. A declaration in which the bidder attests that no hindrance or limitation applies to the offer of consultant services to <organization>, that the offer implies no impingement on the proprietary rights of any third party whatsoever, and that the bidder will indemnify <organization> in any case of a claim by a third party relating to the rights to the proposed solution.
- e. A certificate of compliance with the ISO <number> standard, or proof of knowledgeability regarding the process of such certification.

0.7 Commitments and Certifications to Cover Winning

- a. A bank guarantee for < sum and currency > payable to <organization>, linked to the COL index and including VAT, effective for the term of the project's implementation (the effective term of the contract).
- b. An overall guarantee for the implementation of the project, including responsibility for any proposed subcontractors who have been chosen.
- c. A signed non-disclosure agreement.
- d. The project is to be implemented according to the MethodA methodology. If the bidder proposes any complementary methodologies and tools, they are to be presented in the appropriate sections of the proposal, section 0.17 in particular. Preference will be given to proposals that include methodologies that are integrated with MethodA
- e. The consultant who is chosen in the RFCOn cannot then respond to the RFP. That is to say, the consultant who performs Analysis cannot then perform Design and Build for the same system. However, the RFCOn bidder must be prepared to provide services to <organization>, if <organization> requests them, for RFP consulting, for supervision of the Build stage, for testing and supervision, for control, and for other forms of consultant services.
- f. Signatures will be required on the accompanying contract or on the <name of contract> contract from the Contracts kit of the MethodA Enablers volume. This RFCOn (including the Initiation document) and the bidder's proposal will become an appendix to the contract as explained in the RFP kit of MethodA.
- g. All deliverables produced by the consultancy will be the exclusive property of <organization>. The bidder will commit to full transfer (settlement) to <organization> of the right to use all associated components, including off-the-shelf software. If the proposed solution includes user rights devolving from a third party, the bidder will undertake to ensure transferal (settlement) of these user rights to <organization> without requiring the signature of

<organization> on any contract or agreement other than its contract with the bidder.

0.8 Deliverables from the Consultancy (Content of the Work)

These are the deliverables expected from the consultancy (that is, the content of the work):

- h. An Analysis document, including an executive summary and presentation, as defined in the current version of MethodA.
- i. A model/prototype, clarifying the following points: ...
- j. < any other deliverables >

The quality of the deliverables, and their level of detail, must be such as to enable <organization> to continue the system development and decision-making. All the intermediate products and all the various drafts must conform to the structure of the final documents and clearly identify which sections are incomplete.

0.9 Rights of <organization>

- <organization> may split the proposal, accept parts of it, or implement it in phases.
- <organization> may cancel the RFCon or issue a new RFCon.

0.10 Ownership of the RFCon and Proposal

This RFCon is intellectual property of <organization> and is provided to the bidder solely to enable submission of a proposal. It is not to be used in any way directed to a purpose other than the preparation of the proposal.

The bidder's proposal (the bidder's response to the RFCon) is the bidder's property. <organization> may use the proposal, and the information it contains, for any purpose related to its own operations.

In accordance with the provisions of the Israeli Tenders Law, bidders who do not win the tender may ask to review the winning proposal. In responding to this section, a bidder may specify in advance which sections of the bidder's proposal are confidential and are not for disclosure to competitors. Nonetheless, the RFP Committee is entitled, at its own discretion, to disclose any document at all to the bidders who did not win the tender, provided that in the Committee's professional judgment the contents do not include trade or professional secrets and the disclosure is required by the provisions of the Tenders Law.

0.11 Completeness of the Proposal and Overall Responsibility

It is clear to the parties, and agreed by them, that the submitted proposal is complete and is proposed as a single unit. The bidder will be considered the primary contractor and will

be responsible for all the relevant activities and products of any subcontractors, agents, or other third parties enlisted into the project.

0.12 Examining and assessing the Proposals

0.12.1 Assessing Benefits

For this RFCon, the elements of benefit (quality) in proposals will be weighed as follows:

- 0.15 Consultant's Details – %
- 0.17 Development Tools –__%
- 0.18 Workplan –__%
- 5-1 Attention to Initiation Document –__%

0.12.2 Assessing Cost/Benefit

For this RFP, overall cost/benefit will be weighed as follows:

Cost - __% Benefit - __%

0.12.3 Minimum Score — Go/NoGo Scores

For this RFCon, the following minimum scores have been set:

- 0.15 Consultant's Details – %
- 0.17 Development Tools –__%
- 0.18 Workplan –__%

0.13 Jurisdiction

For all subjects and all matters connected with this RFCon, and for any legal action arising from the administration of this tender, jurisdiction will lie with the authorized courts in <location>.

0.14 Prices

All prices must be quoted in local currency and are understood to be accurate as of the proposal's date of submission.

Terms of linkage are...

0.4.1 Overall cost

Here, the bidder is expected to estimate the overall cost of performing analysis, at a fixed price. There should be clear connections to the workplan that section 0.18 proposes, and emphasis on the timing of payments as linked to milestones and deliverables. Where costs are incurred for computing, communications, materials, and other items that are not work-hours, the costs should also be made clear.

Milestone	Deliverable	Estimated Date*	Cost	Remarks

* Estimate dates by T0+ (that is, as days or weeks elapsed since the start of the project).

0.4.1 Price list

The bidder must provide a price list including, among other items, work-hours for the various professionals who will assist the project.

Item	Unit Price	Quantity	Subtotal

0.15 Consultant's Details

This section should cover general experience in system analysis and specific experience with the type of system that the RFCOn deals with.

Include the type and composition of the workforce proposed for the project, including the name, specialization, and experience of each individual.

Include examples of similar work performed under MethodA.

Include the details of individuals who will serve as references.

Mention any experience with special components of the system, as in the following list:

Each item in the list above is to also be detailed for each secondary consultant (that is, each subcontractor) included in the proposal.

0.16 National/Business Security

0.16.1 Classification of tender documents

This RFCOn, and the bidders' proposals, and all other associated material relating to the tender as well, are classified <security classification>. This RFCOn and all associated documents, including the bidders' proposals, must be handled in accordance with the guidelines of the Procurement department of Ministry of Defense or in accordance with the CCS guidelines for the appropriate classification. [*or, for a business, the guidelines of the organization issuing the RFCOn*]

Upon termination of the RFCOn, or upon receipt of appropriate notification, all documents relating to this RFCOn must be returned to <organization>.

0.16.2 Classification of the project

The project is classified <security classification>.

The bidder, the persons engaged in this project on the bidder's behalf, and all information and documents relating to the project will have appropriate classification. (For Israeli government work, classification is in accordance with the guidelines of the Procurement department of Ministry of Defense or in accordance with the CCS guidelines for the appropriate classification.)

On completion of the project, or termination of the bidder's work on the project regardless of the reason, the bidder will return to <organization> all documents and other materials relating to the project, including all the copies and their backups, and will delete the above from all magnetic media in his possession.

0.16.3 Field security

The bidder must provide field security permits for all employees and for all other personnel working on the project on the bidder's behalf, and must undertake that these permits will not delay the performance of the work.

0.17 Tools and Methods

This section should detail the methods, methodologies, and tools that the consultant is skilled with and proposes using for the analysis (with full MethodA compliance). The bidder should point out clearly how these tools are connected with the prototype, if the RFCon so requests or in any case where the bidder is suggesting a prototype.

The proposed tools must meet the following conditions:

- Run on equipment that the project, <organization>, or the consultant has available.
- Have proven themselves in similar projects.
- Support the local language and the production of a MethodA-compliant Analysis document.
- Be capable of continuity into the Design & Build phase.

0.18 Workplan

In this section, the bidder should detail the workplan proposed for performing the analysis. Include the following items:

- a. Software tools and techniques
- b. Follow-up at monthly intervals (at the longest) of performance vs. plan
- c. Treatment of deviations, and of anticipated-deviation alerts, while remaining within the following limits:
 - Start of work not before <date> and not after <date>.

- <number> milestones and <number> drafts of the Analysis document at intervals of no longer than <number> days.
- Conscientious involvement of the application experts.
- Completion no later than <date>.
- Adherence to milestones, with reviews at two-week intervals (at the longest).
- Preparation of at least <number> presentations to the <organization> management.
- Target dates according to section 1.7 of the Initiation document.

Initiation Document

1. Goals

2. Application

3. Technology

4. Implementation

5. Cost

Additional Documents

The following documents are included for the bidder's attention:

- a. IT Master Plan
- b. <Example/Template> of an Analysis document as recently produced for <organization>
- c. Example of a < prototype / concept document>
- d. The following standards:
 - Human/Computer Interface (HCI) standard
 - Data security standard
 - Supplier/Client contracting standard
 - Change control standard