
Business Intelligence Request for Proposal Template

An RFP is a formal invitation issued by a business or agency requesting interested vendors to submit written proposals meeting a particular set of requirements. If interested in bidding for the project, vendors respond with a description of the techniques they would employ to meet the requirements, a plan of work, and a detailed budget for the project, along with supporting information. An RFP may form part of the final contract once negotiations between the organization and the vendor are completed.

Delete all information colored **GREY**. Fill in or delete all form fields (shaded in GREY). Form shading does not print.

Be sure to change all text to **BLACK** before printing or sending.

Insert Company Name Here

Request for Proposal for a Business Intelligence System

Insert Date of Issue Here

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1 Statement of Work

1.1 Purpose

The purpose of this Request For Proposal (RFP) is to invite prospective vendors to submit a proposal to supply a Business Intelligence solution to **Insert Organization Name Here**. The RFP provides vendors with the relevant operational, performance, application, and architectural requirements of the system.

1.2 Coverage & Participation

The intended coverage of this RFP, and any agreement resulting from this solicitation, shall be for the use of all departments at **Insert Organization Name Here** along with any satellite offices. **Insert Organization Name Here** reserves the right to add and/or delete elements, or to change any element of the coverage and participation at any time without prior notification and without any liability or obligation of any kind or amount.

2 General Information

2.1 Original RFP Document

Insert Organization Name Here shall retain the RFP, and all related terms and conditions, exhibits and other attachments, in original form in an archival copy. Any modification of these, in the vendor's submission, is grounds for immediate disqualification.

2.2 The Organization

Describe the organization in a few brief paragraphs. Include a description of the business and location, including any satellite offices that will be involved in the project. Also include the objectives of the groups who will be using the system, the number of users for the system, expected growth, and what you hope to achieve with the system.

Insert Organization Description Here

Example: We are a privately owned wholesaler and distributor of building materials for 1500 hardware stores in the North East region of the United States (NY, NJ, MI, PA). Our main product lines involve a variety of siding (aluminum and vinyl) and roofing (shingles, steel etc.) materials. We have over 500 individual SKUs that we deal with on an ongoing basis.

At present we do not have a consolidated view of sales data. Sales representatives submit sales reports as excel files to the IT department and the data must be manually dumped into our reporting database. The manual nature of our processes has made it difficult to get timely summary reports of our sales performance across a number of dimensions: sales by agent, sales by region, sales by field manager, sales by SKU, weekly sales, monthly sales etc. As a consequence, the organization is not easily able to report on sales trends and identify opportunities for improvement in terms of sales or our supply chain. The organization would

also like to be able to perform comparisons across product sales to identify cross-selling opportunities for our sales agents.

Our marketing department would also like to have visibility into sales data broken down by product-brand and region in order to determine the effectiveness of campaigns and identify opportunities for new marketing strategies. Since all of our queries and reports must be managed through the IT department, the marketing department must wait weeks before getting the reports it needs. We are in a highly competitive market and require much more agility to respond to any changes in market trends.

We have undertaken a fairly comprehensive requirements exercise for our future BI needs, and are looking for tools that will simplify the query and reporting process. Our goal is to enable IT to automate the building of parameterized reports for management in both our sales and marketing team. We would like to provide sales and marketing managers with dimensional analytical capabilities. Ultimately, our goal is to educate key management user groups to conduct ad hoc querying and reporting, and reduce the burden on our IT department. In the near future, we anticipate that financial business analysts will require much more robust model building and analytical capabilities to perform better trend and sales forecasting analysis.

2.3 Existing Technology Environment

The following is a listing of our current technology environment.

Insert Existing Technology Environment Here

Example:

Database Sources (e.g. SAP, Microsoft Dynamix, Salesforce, JD Edwards...)

Database Environment -DBMS (E.g. IBM DB2, SQL, MySQL, Oracle...)

Transactional Systems (e.g. Peoplesoft, SAP, MS Dynamix...)

Legacy Systems (AS 400)

LAN type

Server operating system (s) (Linux, Windows Server)

Web Services (Java, .Net)

Desktop operating system (s) (Windows Version, Linux Version)

It is essential to give the vendor a clear idea of your technology environment along with any proposed plans for your future architecture. To help in this regard include the following documentation in the Appendix and reference and describe the material in this section of the RFP:

- System integration/ architecture overview diagram.
- Hardware configuration diagram.
- Data strategy overview diagram.
- Describe how data sources are currently shared/communicated with other systems, identifying the systems, data/file types, mode of communication (file transfer, manual, web services etc.).

2.4 Schedule of Events

The following is a tentative schedule that will apply to this RFP, but may change in accordance with the organization’s needs or unforeseen circumstances.

List out all major dates or milestones, especially the issuance of the RFP, the technical questions closing dates, the RFP response closing date (including an exact time, and time zone), end of evaluation date, and final award notification date.

Issuance of RFP	Insert Date Here
Technical Questions/Inquiries Due	Insert Date, Time, Time Zone Here
RFP Closes	Insert Date, Time, Time Zone Here
Complete Initial Evaluation	Insert Date Here
On-site Demonstration	Insert Date Here
Final Award Notification	Insert Date Here

Example:

Issuance of RFP	November 10, 2010
Technical Questions/Inquiries Due	December 8, 2010 17:00 EST
RFP Closes	December 15, 2010 14:00 EST
Complete Initial Evaluation	January 5, 2010
On-site Demonstration	January 12, 2010
Final Award Notification	January 17, 2010

3 Proposal Preparation Instructions

3.1 Vendor’s Understanding of the RFP

In responding to this RFP, the vendor accepts the responsibility fully to understand the RFP in its entirety, and in detail, including making any inquiries to **Insert Organization Name Here** as necessary to gain such understanding. **Insert Organization Name Here** reserves the right to disqualify any vendor who demonstrates less than such understanding. Further, **Insert Organization Name Here** reserves the right to determine, at its sole discretion, whether the vendor has demonstrated such understanding. That right extends to cancellation of award if award has been made. Such disqualification and/or cancellation shall be at no fault, cost, or liability whatsoever to **Insert Organization Name Here**.

3.2 Good Faith Statement

All information provided by **Insert Organization Name Here** in this RFP is offered in good faith. Individual items are subject to change at any time. **Insert Organization Name Here** makes no certification that any item is without error. **Insert Organization Name Here** is not responsible or liable for any use of the information or for any claims asserted therefrom.

3.3 Communication

Verbal communication shall not be effective unless formally confirmed in writing by specified procurement official in charge of managing this RFP process. In no case shall verbal communication govern over written communication.

Vendors' inquiries, questions, and requests for clarification related to this RFP are to be directed in writing to:

Insert Organization Name Here
Insert Department Name Here
Insert Address Here
Insert City, State, Postal Code Here

Attention: **Insert Contact Name Here**
Telephone: **Insert (Area Code) Phone Number Here**
Fax: **Insert (Area Code) Fax Number Here**
E-mail: **Insert Contact E-mail Address Here**

Applicable terms and conditions herein shall govern communications and inquiries between **Insert Organization Name Here** and vendors as they relate to this RFP.

Informal Communications shall include, but are not limited to: requests from/to vendors or vendors' representatives in any kind of capacity, to/from any **Insert Organization Name Here** employee or representative of any kind or capacity with the exception of **Insert Contact Name Here** for information, comments, speculation, etc. Inquiries for clarifications and information that will not require addenda may be submitted verbally to the named above at any time.

Formal Communications shall include, but are not limited to:

- Questions concerning this RFP must be submitted in writing and be received prior to **Insert Date, Time, Time Zone Here**.
- Errors and omissions in this RFP and enhancements: Vendors shall bring to **Insert Organization Name Here** any discrepancies, errors, or omissions that may exist within this RFP. With respect to this RFP, vendors shall recommend to **Insert Organization Name Here** any enhancements, which might be in **Insert Organization Name Here** best interests. These must be submitted in writing and be received prior to **Insert Date, Time, Time Zone Here**.
- Inquiries about technical interpretations must be submitted in writing and be received prior to **Insert Date, Time, Time Zone Here**.
- Inquiries for clarifications/information that will not require addenda may be submitted verbally to the buyer named above at any time during this process.
- Verbal and/or written presentations and pre-award negotiations under this RFP.
- Addenda to this RFP.

Addenda: **Insert Organization Name Here** will make a good-faith effort to provide a written response to each question or request for clarification that requires addenda within **Insert Number of Days (#) Here** business days. Indicate how written responses will be addressed.

Example:

All addenda will be posted to our Web site only.

Insert Site Address or other Form of Communication Here

Example:

<http://www.organization.com/RFPvendoraddenda.html>

Insert Organization Name Here will not respond to any questions/requests for clarification that require addenda, if received by **Insert Organization Name Here** after **Insert Date, Time, Time Zone Here**.

3.4 Proposal Submission

Proposals must be delivered sealed to:

Insert Contact Name Here
Insert Organization Name Here
Insert Department Name Here
Insert Address Here
Insert City, State, Postal Code Here

Example:

Organization Contact Person
Organization Full Name
Department
Street Address
City, State, Zip

on or prior to **Insert Date, Time, Time Zone Here**. **Insert Organization Name Here** shall not accept proposals received by fax.

Vendors are to submit **Insert Number of Copies (#) Here** original copy of proposal marked "Original" and **Insert Number of Copies (#) Here**, marked "Copy." Each original and copy must be individually bound.

3.5 Method of Award

The evaluation of each response to this RFP will be based on its demonstrated competence, compliance, format, and organization. The purpose of this RFP is to identify those suppliers that have the interest, capability, and financial strength to supply **Insert Organization Name Here** with a BI system identified in the Scope of Work.

Evaluation Criteria:

- 1. Insert Criteria Here
- 2. Insert Criteria Here
- 3. Insert Criteria Here
- 4. Insert Criteria Here
- 5. Insert Criteria Here

Example:

Be sure to tie the evaluation criteria back to the requirements specifications. For each category, create sub-categories for scoring. An example is provided under the technical merit category.

- | | |
|------------------------------------------|------|
| 1. Technical merit | 40 % |
| o Integration ability | |
| o Report development | |
| o Metadata management | |
| o Query capability and performance | |
| o Analytical capability | |
| 2. Deliver/Installation/Warranty | 10 % |
| 3. Maintenance/Support | 10 % |
| 4. Training | 10 % |
| 5. Price/ <i>Total Cost of Ownership</i> | 30 % |

Other factors that will be part of the overall assessment process are as follows:

Examples:

- 1. Capability of vendor to meet or exceed requirements set forth in Scope of Work.
- 2. Expressed interest in working with [Insert Organization Name Here].
- 3. Financial stability of vendor.
- 4. Ability of vendor to communicate its vision and capacity for establishing a relationship that addresses current and future needs and trends in the industry.

3.5.1 Selection and Notification

Vendors determined by **Insert Organization Name Here** to possess the capacity to compete for this contract will be selected to move into the negotiation phase of this

process. Written notification will be sent to these vendors via mail. Those vendors not selected for the negotiation phase will not be notified.

4 Scope of Work, Specifications & Requirements

Include a detailed list of the Business and System Requirements. Include a further description for each requirement (typically, in order of importance or in logical categories with importance ranked), and ask the vendor to describe how they will fulfill each requirement. Add, expand upon, modify, or delete requirements as needed. Some sample standard requirements are listed and briefly explained below.

4.1 Reporting Requirements

1. Pre-defined Reports

A set number of pre-packaged reports are available to the user from the BI system.

2. User-defined Reports

The user can create their own reports based on their defined set of criteria from within the BI system.

3. Report Formats

Multiple display options for generated reports (e.g. PDF, Excel, Web Report etc.).

4. Dashboard/Scorecards for Key Indicators

The system includes a set of metrics that provide an “at-a-glance” summary of a departmental (e.g. sales) or line of business performance (e.g. service department).

5. Interactive Report Capabilities

The system includes tools that analyze data from a lower and higher level of the hierarchy (drill down/ roll-up), filter, sort, find, outline view of data etc.

6. OLAP Viewer

The OLAP viewer must be intuitive for end users in terms of drill and pivot functions. Charts must be drillable. The tool must support user-defined hierarchies and/or user defined calculations and have write back capabilities.

7. Spreadsheet View

Tool easily supports the export of data into Microsoft Excel formats and enables data updating/refresh of standard reports within Excel. Formatting is retained when data is viewed in Excel.

8. Integration with MS Office Tools

Allows users to create files within the MS Office suite of products and import/export them to the system, or integrates seamlessly with the products themselves.

9. Exception Reporting

The ability to generate reports as a result of critical business events (e.g. sales for a given region fall below defined threshold).

10. Web-based Authoring

Reports can be built using Hypertext Transfer Protocol (HTTP) enabling web sharing and display.

11. Document Layout and Cosmetic Control

Report formats allow for multiple objects to be viewed in a single document and have columnar, cross-tabular, and banded displays with multiple report tabs and pivot capability. Easy to modify report layout, fonts and colors for design team and/or ad hoc users.

12. Graphical Capabilities

Tool supports a rich variety of graphical displays (2D, 3D, multiple scales, split scales, maps, custom etc.) and chart types (pie, bar, stacked bar, line, histogram, radar, etc.).

13. Report linking

The ability to link reports to one another (e.g. via hyperlinks).

14. Report Prompting

The ability to create reports that prompt end users for content and constraints. Prompt types include: column prompts, filter prompts, hierarchical prompts. Other prompt features allow prompts to be saved, drop down lists etc.

15. Report Development/Ease of Use

Reports can be built using WYSIWYG interface and report design wizards for common report types.

4.2 Data Query Requirements

1. Query Multiple Data Sources

The ability to query and present multiple *types* of data sources (Relational, XML, CSV, OLAP, Web Services etc.) and multiple data *structures* (i.e. multiple schemas, aggregated data) in a single business view. Specify.

2. Complex Queries

The ability to enable calculated conditions in queries, apply filters, subquery and/or use of set operators (Union, Intersection...) to define queries.

3. Scheduled Queries

The ability to run queries at scheduled times/intervals and/or relevant business events (e.g. for compliance reporting).

4. Readable and Modifiable SQL

Queries are written in easy to understand SQL commands which can be readily modified by ad hoc users to facilitate greater query control.

5. Multi-pass SQL

Reports can be broken down into to components which can be separately queried but in parallel to improve performance.

6. High Volume Queries

The ability to query and report on more than 64K rows of data.

7. Ad-hoc Query Generator

The user can easily create their own queries based on their own defined set of criteria.

4.3 Data Management Requirements/Features

1. Data Quality Tools

The vendor has data quality tools (profiling, cleansing, etc.) and methodologies to support the preparation of data for business intelligence applications and reporting.

2. Master Data Management Tools

The vendor has master data management tools and methodologies to support the preparation of a system of record for business intelligence applications and reporting.

3. Metadata Management

Tool enables the creation, consolidation, ongoing auditing and reporting on enterprise wide metadata.

4.4 Integration Requirements

1. Open Application Programming Interfaces (APIs)

The tool has SOAP and WSDL compatible APIs that enable the integration of reporting services with other applications.

2. Native Application Integration

The toolset integrates seamlessly and natively with other enterprise applications (e.g. Salesforce, SAP etc.).

3. Data Integration

The suite has data integration tools available that enable batch integration (e.g. ETL) and/or data federation.

4. Batch Updates

The system allows users to request records, make updates to the records, and then send the record updates back to the data source at some other time without maintaining a connection to the database.

5. Interactive Updates

The ability to change information in real time.

6. Data Warehouse Write Back

The ability to have record changes and write them back to the data warehouse.

4.4 Analytical Requirements

1. OLAP

Specify the desired requirements for OLAP: architecture (relational, multi-dimensional, or hybrid), capacity of cubes, calculations, load capabilities, development approach and/or support for 3rd Party tools.

2. Forecasting/Planning Tools

Tools that help to estimate future customer behavior, sales trends, what-if analysis and market trends based on compiled data are available in the system.

3. Statistical Modeling Tools

The system can generate a statistical expression or equation developed to describe the behavior of the dependent variable based on a known independent variable.

4. Regression Analysis

The system includes a regression analysis tool – it is used to estimate or predict the relative influence of more than one variable on something.

5. Cluster Analysis

The system includes a technique for segmenting respondents without using a predictor (dependent) variable. It identified segments using a variety of data, including attitudinal, usage, or preference inputs. Cluster analysis uses one of several algorithms to group people that are maximally similar to one another and maximally different from other groups.

6. Planning, Budgeting and Financial Functions

Tool enables a standard planning and budgeting operations and calculates standard financial functions (e.g. net present value – NPV etc.)

7. Dedicated Analytical Business Application Suites

The tool has dedicated applications enabling functional or LOB analysis (e.g. talent management, activity based costing, business performance management etc.).

4.5 Information Delivery Capabilities

1. Report Bursting

The ability to send out single reports to multiple locations at the same time.

2. Time-Based Scheduled Reporting

The ability to send out reports to multiple locations at defined times intervals.

3. Event-Based Scheduled Reporting

The ability to send out reports at key reports to multiple locations after critical business events (e.g. month end reports, quarterly reports etc.).

4. Alert/Alarm Capabilities

The system includes an automatic notification system that can be triggered to alert a user when a defined event occurs (e.g. sales drop more than 15%).

5. Versioning and/or Report Archiving

The tool has the ability to keep records of report versions and archive older reports.

6. BI Search

The ability to search databases to find reports and unstructured data.

7. Dedicated BI Portal

Provides users with a dedicated and personalized access to organizational data through a single portal interface, where they can collaborate and share data. Enables remote access.

8. Integration with 3rd Party Portals

Tool can publish reports and data to 3rd Party tools like SharePoint.

9. Mobile Device Support

Tool enables access to data via handheld mobile devices (e.g. iPhone or Blackberry). Alerts/notifications can be sent to handheld devices.

4.6 Administration and Data Security Requirements

1. Directory Services

The tool enables directory services (e.g. LDAP or NT) to administer access and policy controls over data/report access through named user groups.

2. Table Level Security

Controls enable administrators to restrict access to data at the table level in databases.

3. Column Level Security

Controls enable administrators to restrict access to data at the column level in databases.

4. Row Level Security

Controls enable administrators to restrict access to data at the table level in databases.

5. User Profile Controls

Restrict user access to functionality based on user profiles.

6. Usage Monitoring

Monitor and report on system usage by end users.

7. Document Locking and Check Out

Enables documents to be looked and checked out ensuring version control and tracking when reports are modified.

4.7 Technical/Architectural Specifications

1. Client Operating Systems Supported

What client operating systems are supported by the BI system?

2. Server Operating Systems Supported

What server operating systems are supported by the BI system?

3. Scalability

How many concurrent users can be supported on this system? Can the system be scaled across servers?

4. Programming Language Used

What programming language(s) is/are used in this application?

5. Development Tools

Regression testing tools, application development tools (SDKs), development/test/production environments, re-usable objects or components etc.

6. Minimum Hardware Requirements

Describe the minimum and recommended hardware requirements for both **client** and **server**.

7. Database Servers Supported

What database servers are natively supported and/or used by this product?

8. Hosted or Client-Server Based

Identify if this is a Hosted-BI solution or a traditional desktop or client-server application.

9. Common Metadata Layer

Platform contains a single abstraction layer that hides the complexity of the underlying data from end-users via a single metadata and business logic layer for the entire suite.

5 Vendor Qualifications and References

All vendors must provide the following information in order for their proposal to be considered:

Example:

1. A brief outline of the vendor company and services offered, including:
 - Full legal name of the company
 - Year business was established
 - Number of people currently employed
 - Income statement, and balance sheet for each of the two most recently completed fiscal years certified by a public accountant.
2. An outline of the product line-up they currently support.

3. A description of their geographic reach and market penetration.
4. An outline of their partnerships and relationships to date.
5. An outline of their current and future strategies in the marketplace.
6. Information on current software clients, including:
 - Total number of current clients
 - A list of clients with similar needs using the same software
 - Evidence of successful completion of a project of a similar size and complexity.
7. References: Contact information for 20 references (if possible) from projects similar in size, application, and scope and a brief description of their implementation.

6 Budget & Estimated Pricing

Insert Organization Name Here has a total budget of **Insert Total Budget Figure & Currency Type Here** for this project.

All vendors must fill out the following cost breakdown for the implementation of their BI system for **Insert Organization Name Here**'s project as, described in this RFP. Costs should be identified as either capital or non-capital in nature. The vendor must agree to keep these prices valid for **Insert Number of Days (#) Here** days as of **Insert Date, Time, and Time Zone Here**.

6.1 Deployment Models

The following pricing sheets are to be used as a guide for your response. Please indicate the types of pricing/installation models offered by your organization by placing an 'X' under the "Available" column. If a model is not offered, please indicate this by placing an 'X' under the "Not Offered" column.

Deployment Models	Available	Not Offered
Client Server Model	<input type="checkbox"/>	<input type="checkbox"/>
ASP or Hosted Model	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>

6.2 Five Year Total Cost Summary

For all available deployment models listed above, provide a five year cost summary as displayed below.

Five Year Total Cost Summary						
Costs	Total	Year 1	Year 2	Year 3	Year 4	Year 5
Hardware						
Software Licensing						
Third Party Software						
Application Software						
Documentation & Training						

Maintenance						
Installation						
Integration						
Legacy Data Loading						
Project Management						
Misc.						
Other (specify)						
Total:						

Descriptions:

Hardware: List, describe, and record the cost of each piece of hardware that is required to optimally run the software.

Software Licensing: List, describe, and record the licensing, implementation, maintenance, support, and training fees associated with your proposed software.

Third-Party Software (Middleware): List, describe, and record the cost of each piece of software (including operating systems) that is required to optimally run the software.

Installation: Describe any labor, equipment, supplies, or other costs associated with installing your proposed software.

Integration: Describe any labor, equipment, supplies, or other costs associated with integrating your software into our current architecture and back-end systems.

Legacy Data Loading: Describe any labor, equipment, or other costs associated with importing legacy data from current systems into your BI software.

Maintenance: Describe and cost out any other ongoing costs associated with the operation and maintenance of your proposed software.

Documentation & Training: If there are fees associated with your user or technical documentation, list them here.

Project Management: If there are project management fees associated with your proposed software, list and describe them here.

Miscellaneous: List and describe any other costs associated with your proposed software solution.

7 Vendor Certification

This certification attests to the vendor’s awareness and agreement to the content of this RFP and all accompanying calendar schedules and provisions contained herein.

The vendor must ensure that the following certificate is duly completed and correctly executed by an authorized officer of your company.

This proposal is submitted in response to Request For Proposal for BI Software issued by **Insert Organization Name Here**. The undersigned is a duly authorized officer, hereby certifies that:

_____ (Vendor Name)

agrees to be bound by the content of this proposal and agrees to comply with the terms, conditions, and provisions of the referenced Request For Proposal (RFP) and any addenda thereto in the event of an award. Exceptions are to be noted as stated in the RFP. The proposal shall remain in effect for a period of **Insert Number of Days (#) Here** calendar days as of the Due Date of the RFP.

The undersigned further certify that their firm (check one):

- IS
- IS NOT

Currently debarred, suspended, or proposed for debarment by any federal entity. The undersigned agree to notify **Insert Organization Name Here** of any change in this status, should one occur, until such time as an award has been made under this procurement action.

Person[s] authorized to negotiate on behalf of this firm for purposes of this RFP are:

Name: _____	Title: _____
Signature: _____	Date: _____
Name: _____	Title: _____
Signature: _____	Date: _____

Signature of Authorized Officer:

Name: _____	Title: _____
Signature: _____	Date: _____

