

RFP - Request For Proposals

<System name>

Requested system's highlights

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TABLE OF CONTENTS

0. Administration	2
0.1 General	2
0.2 Definitions	2
0.3 Work Procedures and Tools	2
0.4 The RFP	3
0.5 Classification of the RFP Components	4
0.6 Commitments and Certifications to Cover Bidding	5
0.7 Commitments and Certifications to Cover Winning	7
0.8 Rights of <organization>	8
0.9 The Proposal	8
0.10 Ownership of the RFP and the Proposal	10
0.11 Overall Responsibility	11
0.12 Examining and Assessing the Proposals	11
0.13 Jurisdiction	11
0.14 Prices	12
0.15 Used Equipment	12
0.16 Security Classification	12

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0. Administration

Activity	Date

0.1 General

<full legal name of organization> (hereafter, “<organization>”) invites proposals for a computerized <IT/infrastructure> system dealing with < matters that the system handles > for the purpose of < purpose of the system > . The goals of the system are detailed in section “1. Goals” below.

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

0.2 Definitions

The following are some essential terms for this RFP:

- _____

For more definitions, see the RFP’s Glossary and section 2.1.4 of the RFP.

0.3 Work Procedures and Tools

0.3.1 Receiving the full RFP

For the full RFP, 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 RFP is:

Name: _____

Phone: _____

Fax: _____

Postal address: _____

E-mail: _____

All communications regarding this RFP 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>.

The minutes of the bidders' meeting, including answers to all the questions, are to be sent in an organized fashion, as defined in section 0.3.1, to all the vendors who purchased or received the technical part of the RFP.

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 proposals as defined in Section 0.9 below, 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 RFP

0.4.1 Content of the RFP

This RFP contains —

1. This administrative part, numbered Section 0
2. The technical part (specifications for the system), numbered Section 1 through Section 5

<Classification>

3. Appendices
4. A summary of the RFP (the Executive Summary, if included)
5. A basic contract

Before looking at the other sections of the RFP, carefully read this Administration section. It details the general terms of the RFP and defines exactly how to respond.

0.4.2 Additional Guidelines

In addition to this RFP, the following guidelines should be taken into consideration as proposals are prepared:

- c.
- d.
- e.

In any case of inconsistency between this RFP and any other guidelines, the RFP prevails.

0.5 Classification of the RFP Components

0.5.1 The Method

The components of the RFP (corresponding to the sections of the document's technical part) are classified as follows:

Information (I) A component included for information purposes only. The expected response from the bidder is "Have read, have understood, and accept." Any remarks or reservations by the bidder must be included in the response.

General (G) A component that can be handled with a general answer in a relatively free format. Usually this is an "open" section in the RFP — a section where creative suggestions and solutions may be introduced as explained in Section 0.9. Nonetheless, when all is said and done, the requirement must be clearly addressed, the principal features must be emphasized, and it must be clear what exactly is offered, what already exists, and what is promised or suggested.

Specific (S) A component that requires an exact and detailed response, in a precise format as required by the RFP — for example, by completing a table, attaching certificates, etc. Usually this is a "closed" section of the RFP — a section where some information is mandatory and more may be added. Additions are to be treated according to the guidelines for General components. If the information is voluminous, it should be added as a properly

<Classification>

numbered appendix.

**Mandatory
(M)**

A Go/NoGo component. (What is especially “mandatory” is the content in the response, not the act of responding. Responding to all components is mandatory, as explained in section 0.9.) The expected response from the bidder is “Have read, have understood, accept, and can do,” or a complete and salient answer as for Specific components, or the fulfillment of a requirement (for example, the inclusion of a certificate), or a guarantee — whichever is appropriate to the component. A missing answer, an inappropriate answer, an unmet requirement, an unclear answer, or an ambiguous answer for this component will peremptorily disqualify the proposal.

**Not
Applicable**

A component intentionally omitted from the RFP 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.

“In addition to each section’s classification, pay attention to the guidelines and requirements written into the section itself.”

0.5.2 Classification of the Administration components

The components of the Administration section (this section) are Mandatory, and they all require precise answers. The proper answer is “Have read, have understood, accept,” or another clear and salient answer, possibly with accompanying certificates, or a commitment to a future need, all in accordance with the content and context of the section. See explanation in section 0.5.1 above.

0.5.3 Classification of the technical part

The components of the technical part (sections 1–5 below) are classified as follows:

- _____

The same classifications are repeated in the body of the RFP, near the heading of each section or of its hierarchically superior section.

In addition to each section’s classification, pay attention to the guidelines and requirements written into the section itself.

0.6 Commitments and Certifications to Cover Bidding

0.6.1 Bank guarantee for proposal

Attach a bank guarantee equal to 10% of the bid, payable to <organization>, linked to the COL index and including VAT, effective for the term of the proposal as specified in Section 0.6.3. 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 RFP.

0.6.2 Certifications

The bidder must produce government certificates attesting to valid methods of accounting and to VAT and income tax registration. [Please attach these certificates in appendix 0.6.2 of the proposal.]

0.6.3 Term of the proposal

The proposal will be valid for 120 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.

0.6.4 Proprietary rights

The proposal should include a statement regarding proprietary rights and the right to bid, as follows:

Our company is the sole owner of the proprietary rights to the solution that we offer, and there is no hindrance or limitation in force over the solution that is hereby presented to you.

Also participating in this proposal, and aware of this declaration, is <other participant>.

We will indemnify you in any case of a claim by a third party relating to the rights to the proposed solution

0.6.5 Conflict of interest

In this section, the bidder will declare as follows:

To the best of our knowledge neither the proposal of this solution nor its implementation (should we win the tender) involves any conflict of business or personal interest for us, for our employees, for our subcontractors, or for third parties involved in the proposal or in the implementation.

0.6.6 Demonstration and presentations

0.6.7 Service, maintenance and spare parts

The bidder will include a statement phrased as follows:

All the components of the proposed solution (excluding software to be developed specifically for the needs of the system) are continuously serviced and maintained. To the best of our knowledge, and the knowledge of all the secondary suppliers involved

in this proposal, no information exists regarding any planned cessation of support for them and there will be no problem in supplying parts and updates for a period of 5 years from the day of installation.

0.6.8 Reciprocal procurement

If the proposed solution includes imported components, verification of reciprocal procurement from the Israel Industrial Cooperation Authority (the ICA, at the Ministry of Industry and Trade) should be enclosed.

0.6.9 Locally produced parts

If the proposed solution includes components made domestically, they should be listed exactly, with their monetary value (as a proportion of the bid) and the added value of the domestically produced portion. The declaration should be signed by the bidder's accountant.

0.7 Commitments and Certifications to Cover Winning

0.7.1 Bank guarantee for project implementation

Attach a bank guarantee equal to 10% of the bid, 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).

0.7.2 Overall guarantee

Attach an overall guarantee for the implementation of the project, including responsibility for any proposed subcontractors who have been chosen.

0.7.3 MethodA procedure

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 technical part, section 3.13 in particular. Preference will be given to proposals that include methodologies that are integrated with MethodA.

0.7.4 Contract and technical appendix

Signatures will be required on the accompanying contract or on the <name of contract> contract from the Contracts kit of the MethodA Enablers volume, and in both cases also on the technical appendix attached to the contract and constituting an integral part of it. The technical appendix is to be formed by integrating material from this RFP and from the proposal, as explained in this kit and in the Design and Build kit in the Basics volume (Life Cycle subvolume). The appendix will serve as a preliminary Design document for the system and will replace all previous technical

papers for the system. The appendix must be completed no later than <time period> from the date of the contract.

In responding to the RFP, the bidder should address this section with the following phrasing:

The bidder understands that <organization> intends the contract to be finalized and signed within <1/2/3> months. If the contract is not finished and signed by the end of that period <organization> reserves the right to approach the next queued bidder and negotiate a contract with that bidder.

0.7.5 Ownership and right to use the system

The proposed system 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.

0.7.6 Guarantee, maintenance, and service

Include a commitment to provide a guarantee, maintenance, and service, covering inter alia the system parts and individual components detailed in section 4.6 of the RFP and in Sections “n” and “o” of the MethodA Design and Construction contract template.

In any case, the minimum period of guarantee for the entire system must be at least 12 months. Response time for calls must not exceed <number> hours, and repair time must not exceed <number> hours.

0.7.7 Condition of used equipment

In a case involving used equipment (see Section 0.15), the bidder is committed to provide papers attesting that the equipment is in proper working order. An overall commitment will be made in this section, and detailed commitments in the appropriate 3.x sections (that is, the appropriate subsections of section 3).

0.8 Rights of <organization>

0.8.1 Splitting the proposal

<organization> may split the proposal, accept parts of it, or implement it in phases.

0.8.2 Canceling the RFP

<Organization> may withdraw the RFP or issue a new RFP...

0.9 The Proposal

0.9.1 Overall structure

The proposal's structure must match the RFP's structure, point for point.

For example, section 2.1 of the proposal will consist of the response to section 2.1 of the RFP, section 2.2 will respond to section 2.2, etc. When there is no response for a section of the RFP, the corresponding section of the proposal should be labeled "no response," so that the numbering scheme for subsequent sections will continue to match.

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.

0.9.2 Proposal structure: detail

The content and structure of the response to each RFP component (and subcomponent) must match the component's classification: General, Information, or Specific, as defined in section 0.5 above.

The bidder is entitled to add further remarks and suggestions in an additional section entitled "Other" and numbered *x.97* or *x.y.97* as appropriate to the hierarchical level.

If the response is lengthy, it is recommended to use an appendix at the end of the proposal. For example, section 2.19 of the proposal would refer to appendix 2.19, and that appendix would complete the details of the proposed solution regarding data security. Similarly, section 3.11 would refer to appendix 3.11 for additional details of the proposed database, etc.

It is extremely important to use appendices, in order to keep the body of the proposal simple and easy to read. Technical and promotional materials should be attached as appendices to the relevant sections and referenced as described above.

0.9.3 Number of copies

The requirement to submit the proposals in four separate envelopes comes from the Accountant General of the Israeli Ministry of Finance. Non-government organizations may treat this section according to the requirements of their own purchasing departments. For the sake of promoting proper evaluation, it is highly advisable to require separation of the response to the technical part from the response to the Costs section.

The proposal is to be submitted in 4 envelopes, in the following manner:

- First envelope: The response to the Administration section, in one copy. Each page is to be stamped with the bidder's official stamp.
- Second envelope: <number> copies containing only sections 1, 2, 3, and 4 (without the Administration section and without the Costs section).
- Third envelope: The response to the Costs section, in one copy. Each page is to be stamped with the bidder's official stamp.
- Fourth envelope: One complete copy of the entire proposal, sections 0–5, each page stamped with the bidder's official stamp.

0.9.4 Number of proposals

Bidders must submit no more than **two proposals** (alternatives). Each alternative must be submitted as a separate proposal and will be considered independently of the other in every way. This constraint extends to proposals involving cooperation with other suppliers.

0.9.5 Proposal summary (Executive Summary)

If the proposal extends to 50 pages or more, an executive summary (proposal summary) must be included. Such a summary should preferably not exceed 15 pages.

0.10 Ownership of the RFP and the Proposal

0.10.1 Ownership and use of the RFP

This RFP is the intellectual property of < organization, or Government of Israel > 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.

0.10.2 Ownership and use of the proposal

The bidder's proposal (the bidder's response to the RFP) is the bidder's property. <Organization> may use the proposal, and the information it contains, for any purpose related to this RFP process, until a contract is finalized.

0.10.3 Third party

In accordance with the provisions of the Israeli Tenders Law (in Israel), 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 Overall Responsibility

Completeness of the Proposal and Overall Responsibility - Joint proposals and subcontractors

The bidder is entitled to submit a proposal jointly with other suppliers, subcontractors, agents, etc., subject to the following conditions:

- a. For each and every component, it must be clear whose property the component is, by whom it is supplied, and by whom marketed — and if jointly, what everyone's specific portion is.
- b. All the involved subcontractors, agents etc. should be described in section 4.1.4 of the RFP ("Vendors and other outsiders"), in terms of the characteristics requested there. The number of proposals must not exceed the limit specified in section 0.9.4.

It is clear to the parties, and agreed by them, that the submitted proposal is complete and is proposed as a single integral and operational unit. The bidder will be considered the primary contractor and will be responsible for all the relevant activities and products of the subcontractors, agents, or third parties enlisted into the project. For the purpose of obtaining service for components that are supplied by subcontractors or agents, <organization> may approach them directly or approach the primary contractor. However, <organization> has the right to select part of the proposal, and has the right to implement the proposal in separate parts or in phases, as defined in section 0.8 above.

0.12 Examining and Assessing the Proposals

0.12.1 Assessing Benefits

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

Goals - __% Application - __% Technology - __% Implementation - __%

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 RFP, the following minimum scores have been set:

Application - __% Technology - __% Implementation - __%

0.13 Jurisdiction

For all subjects and all matters connected with this RFP, 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 are understood to be accurate as of the proposal's date of submission. Any terms of linkage are as detailed in section 5.

0.15 Used Equipment

In responding to the appropriate technical sections of this RFP, the bidder may choose to offer used equipment. If so, the used equipment must be mentioned in a general response to this section, and it must be detailed in the responses to the relevant technical sections. in the Cost sections, and in every other relevant section: Service and Maintenance, Robustness and Reliability, Third-Party Software, etc. In any case, the bidder must note explicitly, in the context of each relevant component, whether the proposed equipment new or used. See also section 0.7.7.

0.16 Security Classification

0.16.1 Classification of tender documents

This RFP, and the bidders' proposals, and all other associated material relating to the tender as well, are classified <security classification>. This RFP 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.

Upon termination of the RFP, or upon receipt of appropriate notification, all documents relating to this RFP 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.

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.