RFP TO CONTRACT AWARD PROJECT CHARTER

Instructions

Request for Proposals (RFPs) are projects that can take up to 3 months or more to complete. The intent of this RFP to Contract Award Project Charter development phase is to bring together key team members through a structured process to:

- *identify the RFP project requirements, to support strategy development,*
- *set expectations, uncover hidden issues and misunderstandings, and*
- *lay the foundation for a successful RFP project by developing agreed-upon objectives, tasks, schedules, and RFP project requirements.*

Customize this template accordingly. **<u>Delete</u>** *the italicized informational guide text provided and fill in the template with information that is directly related to your RFP Project.*

Note: *This Charter is to* **only** *to be shared internally with agreed upon charter members.*

1. RFP to Contract Award - Project Overview

RFP Project Title	*Enter RFP project title.*
Charter Prepared By	*Enter the name(s) of the individual(s) who prepared this charter. Include Contact Name and email.*
Executive / Owner Sponsor / Director	*Enter the name(s) of the individual(s) who serve as ultimate authority, decision maker and advisor for the project. Include Contact Name and email.*
Project Department	*Enter the department undertaking this RFP to Contract Award project.*
Project Timeline	*Enter the estimated time from start of project to completion of contract requirements and contract award.* *Describe specific timelines for more specific tasks in Section 3 - Project Tasks and Schedule.*
Project Budget	*Enter the budget amount (and if budget has been approved).*
Goods Only, or Services Only, or Services & Goods	*Enter procurement type.*

2. Project Description

Strategy Development Situation / Problem / Opportunity	*Strategy Development / Briefly describe the problem or opportunity. This statement provides the basis for the rest of the document.* *Write this in terms of the organizational / departmental problem or opportunity discovered, not in terms of the solution needed.*
Benefits	*What are the Strategic returns / benefits from this procurement – cost reduction, diversity minority and women owned businesses, productivity, efficiencies, organizational / department goals met, etc.? What is the impact if the project is not undertaken?*

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Background	*Provide context for the project that will allow participants to understand the project goal from the same reference points.*
Purpose (Goal) Statement	*State one goal that gives purpose and direction to the project. This is what you intend to do to address the problem or opportunity identified above. This is the solution you propose. Summarize what will be implemented, corrected, installed, replaced or otherwise addressed to solve the problem. This section should be written in language that is easy for everyone to understand.*
Objectives	*Objectives are a more detailed version of the purpose (goal) statement. They outline what will be accomplished in this project.*
Project Scope - In Scope	*Clear Statement of "What This Project Will Include"* *Deliverables / Tasks are tangible and/or measurable things that the project will produce to enable the objectives to be achieved (a successful procurement). When all deliverables & tasks are complete, the goal is met.*
Project Scope - Out of Scope	*"Clear Statement of What This Project Will Not Include"*
Key Success Criteria – Benefits of the Project and / or the Costs of not doing the Project	*This is the <u>measurable</u> value resulting from doing this project.* *What state must exist for the project to be a success?* *Benefits: Address quantitative and tangible benefits in terms of what will be improved, what problems will be reduced or what benefit will this be to the department and the University. What is the measurable business loss resulting from not doing this project?*

3. Project Team and Organization Roles & Responsibilities

In the table below:

List names, roles, responsibilities and anticipated time commitment level and/or start/end dates of participation.
- *Identify any and all appropriate staff, the executive owner/sponsor/director, project lead, technical lead, functional lead, and subject matter experts. Establish the core teams.*
- *Responsibilities. Describe specific roles and responsibilities and interaction with other teams/individuals.*
- *Time: Establish the project timeline and time commitment or start/end dates of participation for all involved.*
- *Communications: Establish communication responsibilities.*

Name, Title, Dept Contact Information	Role	Responsibilities	Time
	Executive / Owner Sponsor / Director	• *Serves as ultimate authority, decision maker and advisor for the project* • *Budget owner / Secures funding.* • *Makes business/approach decisions for the project.* • *Participates in key activities.* • *Makes resources available.* • *Addresses issues.*	
	Evaluation Team (Committee Chair and Committee Members)	• *Identifies those who will participate in the evaluation of proposals (the Evaluation Committee and Committee Chair).*	

		• *Note: Odd number required. Not less than three (3).* • *Maintain confidentiality and impartiality throughout the RFP project.* • *Acts as an impartial, knowledgeable, and fair proposal evaluator. (ensure no conflict of interest with any respondents)* • *Retains and maintains all evaluation documentation.* • *Reviews, evaluates, scores, documents, rates and independently ranks all proposals.*
	Procurement Manager/Coordinator	• *Provides oversight of entire RFP process.* • *Provides standard procurement templates & examples for the RFP documents.* • *Provides procurement law expertise.* • *Manages procurement specific administrative elements of the RFP process, such as, ensures timeliness, reviews final scoring calculations for accuracy, etc.* • *Acts as sole point of communication / contact for RFP.* • *Provides procurement strategy expertise.* • *Provides expertise in contract development and contract strategy.* • *Provides procurement expertise in the development of the statement of work.*
	Department's Project Manager / Procurement Contact	• *Reports to and receives direction from sponsor.* • *Manages, reviews and prioritizes work plans.* • *Provides status reports.* • *Manages the project teams.* • *Recommends changes, escalates issues and mitigate risks.*
	Development Team	• *Develops RFP/contract requirements.* • *Determines evaluation criteria.* • *Develops scope of work (SOW.)*
	Subject Matter Experts (SME)	• *Provides expert insights into the process.* • *Helps develop requirements.* • *May help in evaluation of proposals.*
	Consultations / Resources	• *Identifies others who could provide valuable insight into the process (potential non-voting members).*
	Post Award Team	• *Identifies who would be responsible for implementing and managing the resulting contract.* • *Note: Service Contracts (TGS and PCS) require annual performance reporting.*

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4. Project Tasks / Deliverables and Schedule

Task/Project Deliverables	Start	Finish	Comments
Initiate Procurement Process			
Submit Intake Form Discovery Process			
RFP Project Kick Off			
RFP Solicitation Development			
Define Scope of Work			
Develop Evaluation Criteria, Weights, Benchmarks, Process			
Identify Evaluation Committee Members			
Develop Contract Requirements			
Goods Contract, or			
Services Only Contract, or Goods & Services Contract (TGS or PCS)			
Publish & Advertise RFP Solicitation			
Bid Opening and Validation of Responses			
Evaluate & Score Proposals			
Preliminary Scoring			
Demonstrations/Interviews, if required			
Internal Negotiations Criteria			
Best and Final Offer (BAFO)			
Final Scoring			
Notice of Intent to Award			
Negotiate & Finalize Contract			
Goods Only Contract, or			
Services Only or Goods & Services Contract (TGS or PCS)			
Legal Review – Supplier & University			
Contract Execution - Signatures			
Legislative Review / Approval - Services Only Contracts and Goods & Services Contracts			
Contract Award (upon legislative approval)			
Contract Work Begins!			

5. Areas of Impact (e.g. Stakeholders, Departments, Technology, Processes, Payroll, etc.)

In the table below:
- *Identify at a high-level, areas, stakeholders, departments, etc., that may be affected or need to be involved as a result of this project.*
- *Identify systems, technology, products, processes, services, etc., that may be affected or need to be involved as a result of this project (e.g. Workday, Payroll, etc.)*
  - *Will the solution/service/product connect to anything or require additional resources? (support, security requirements, etc.) - UITS*
  - *Will the solution/service/product Mobile and Web services, contracts, and products. Web accessibility compliance.? (UREL - Chris Nixon)*
  - *Will the solution/service/product assist in taking payments? (PCI Compliance - Natalie Undernehr)*
- *List the areas affected and outline a plan for communicating and managing the impact (e.g. faculty, administration, staff, board of trustees, legislature, students, alumni, outside vendors, federal/state reporting agencies, prospective students, parents, media, public, etc.?*
- *What persons, departments, committees need to be involved in or support this project? Who are those outside of the project who have an interest in the project?*
- *Who will be affected by the project? Who will be affected if the project is not undertaken?*

Areas of Impact	Mitigation / Communication Strategy

6. Risk Management Plan

In the table below:
- *Identify any factors that can affect the outcome of the project including assumptions, risks, constraints and major dependencies on other events or actions.*
- *These factors can affect deliverables, success, and completion of the project.*
- *Record anything that can go wrong during this project and the probability of such occurrence.*
- *Identify the expected risks to which the project will be exposed. Assess the likelihood of each risk occurring (probability) and its impact on the project. Outline a plan for managing the risks. Include risk-minimization measures and contingency plans for recovery and damage limitation. Rate each risk probability and impact as High, Medium, or Low.*

Risk Factor	Probability High/Medium/Low	Impact High/Medium/Low	Mitigation Strategy

7. Communication Strategy for High Risk / High Impact Projects

Describe in the table below communication plan for high impact projects (enterprise sized projects, public impact, high risks, etc.):

- *Where will information pertaining to the project be published?*
- *If external stakeholders involved list who they are and any associated communication plan.*
- *Think about "Adoption Planning." Adoption planning starts at the beginning of every project with proper communication planning, marketing, champion growth, stakeholder involvement, rolling out training plans, etc. The additional effort here will be absolutely essential to the overall success of your project.*

Communication Strategy High Risk / High Impact Projects

8. Agreement

This section contains the signatures of the key stakeholders, signifying agreement of roles and the description of the project as it appears in the project charter.

_____ _____

Name   Date
Executive Sponsor
Position, Department

_____ _____

Name   Date
Project Manager
Position, Department

_____ _____

Name   Date
Project Role
Position, Department

_____ _____

Name   Date
Project Role
Position, Department