

Company Name

[Email address]

Balanced Scorecard and/or
Key performance Indicator (KPI)
Performance Management System

**Request for Proposal**

Reference: xxx-xxx

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# Introduction

(Insert your introduction here)

## Submittal Due Date

To be eligible for consideration, three (3) copies of a vendor's response to this Request for Proposal (hereafter called "proposal") must be received by *(insert your company name / address)* no later than close of business on *(insert time & date)*. The response must be submitted in a sealed envelope with the vendor’s name, Request for Proposals (RFP) Number and the due date clearly identified on the outside.

## Information About Us

(Insert a brief summary about your company to assist the vendor in their understanding of your business)

## Description of Project

(Insert a brief description to summarise the purpose and scope of your project).

## Contact

Please use the information below to correspond with us.

Name:

Address:

e-Mail:

Phone Number

# Scope of Work

Please only use the following codes to describe your compliance to each requirement below:

* **Yes** – We are fully compliant to the requirement
* **Part** – we are partially compliant to the requirement (please use the box at the end of the section to clarify your partial compliance)
* **No** – We are not compliant to the requirement

Use the box at the end of each section if you have any further information that will help us make a better assessment of your product.

**Note:** Add, Delete or Amend the items below to suit your requirements.

## Business

|  |  |  |
| --- | --- | --- |
| No. | Requirement | Compliant |
|  | The solution shall serve as a comprehensive management portal and gather all performance management information in one place. |  |
|  | Provides industry standard functionality to managing a balanced scorecard |  |
|  | Endorsed by the Balanced Scorecard Institute  |  |
|  | Uses terminology supported by the Balance Scorecard Institute |  |
|  | Able to support other management models where performance indicators are involved.  |  |
|  | Supports strategy mapping at different levels |  |
|  | Strategic support through to tactical alignment by linking goals, initiatives and metrics |  |
|  | Ability to communicate high level strategic elements e.g. Vision, Mission, Strategic Objectives and measures throughout the organisation |  |

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| Comments for High Level Business Requirements |
| Comments here please |

## Scorecard and Initiatives

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| No. | Requirement | Compliant |
|  | Ability to accommodate a minimum of 30 performance scorecards with a parent-child relationship with at least 3 layers of cascading (System-wide, Division, Department/College). |  |
|  | Ability to accommodate personal scorecards for the leadership team. |  |
|  | Customizable reporting capabilities (Goals, Outcomes, KPIs, initiatives, Activities) at all levels (ad-hoc drill-down reports, traffic light status, etc.). |  |
|  | Flexibility to create/move objectives/measures/initiatives/maps – offering drag, drop, and copy capability |  |
|  | An ability to use weighting for auto calculations on objectives/ measures/ initiatives  |  |
|  | Ability to attach relevant reports or documents as evidence to each goal, KPI, and initiative. |  |
|  | Ability to personalize backgrounds, and import images |  |
|  | Navigation from the system-wide scorecard to child scorecards |  |
|  | Display the status of each goal, KPI and initiative using a color coded evaluation system. With parameters that are customizable by the client administrator. |  |
|  | Ability to input issues, challenges, achievements related to goal, initiative, or KPI. |  |
|  | Ability to do comparison between same KPIs from different scorecards |  |
|  | Associate measures with strategic objectives |  |
|  | Enables scorecard users to collaborate via discussion threads about the status of metrics and to recommend remedial action |  |
|  | Able to assign ownership to metrics and scorecards |  |
|  | End users are able to build their own metrics / set their own thresholds using a wizard to create a metric calculation |  |
|  | Initiatives are linked to goals and strategic outcomes. Each initiative can be linked to multiple scorecards and organizational units. |  |
|  | Basic, clear, and easy-to-use functionality for manual data collection (through data-input). |  |
|  | Ability to accommodate KPIs of a qualitative nature, i.e. it is not possible to set a numeric value that expresses goal achievement on the KPI. |  |
|  | During creation of scorecards a 'publishing' functionality that makes it possible to set KPIs active or inactive is desired. |  |
|  | Has Gantt chart view for initiatives and associated tasks with the ability to manage initiatives to include activities, milestones, allocation to individuals, alerts and add links to relevant documents.  |  |

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| Comments for scorecard |
| Comments here please |

## Dashboards and Reporting

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| --- | --- | --- |
| No. | Requirement | Compliant |
|  | Ability to build / customize dynamic dashboards. |  |
|  | Able to track / report on initiatives and other projects alongside KPIs/metrics to monitor the actions being undertaken to correct and improve performance associated with a metric |  |
|  | Ability to accommodate alerts (including but not limited to metric / threshold changes) and reminders. |  |
|  | Ability to publish dashboards and reports in a variety of format including but not limited to Web, PDF, EXCEL, POWERPOINT, and WORD. |  |
|  | Reporting function with standard (including pre-built) reports such as; Annual Performance Measure Data Report, Red Performance Measure Report |  |
|  | Ability to generate ad-hoc reports easily by normal users without IT programming or system administration experience. |  |
|  | Ability to create and display multiple types of charts consistent with basic Excel functionality. |  |
|  | Ability to distribute reports to individuals or groups of employees. |  |
|  | Able to provide a color-coded summary indicating the state of a particular metric compared to a goal or threshold target |  |
|  | Can drill from dashboard graphic (for example, dial, traffic light) to any source system |  |
|  | Able to group metrics by objectives and ownership |  |
|  | Able to integrate multiple datasets in one dashboard, including relational and multidimensional data |  |
|  | Ability / functionality to show trends. |  |
|  | It must be possible to get a quick overview over deviations (e.g. red lights, initiatives that are not completed, etc.). |  |

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| Comments for Reporting |
| Comments here please |

## Integration

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| --- | --- | --- |
| No. | Requirement | Compliant |
|  | Ability to import data from other platforms using vendor templates in order to migrate existing data into the system and avoid re-entering data  |  |
|  | Email communication – ability to e-mail users from within the application |  |
|  | Ability to integrate effectively with existing information systems  |  |
|  | Supported browsers will display correctly in the most current version of all common browsers including but not limited to: Internet Explorer, Firefox, Safari and Chrome. |  |
|  | Ability to view and update the system on normal PCs, Web, smart phones, and tablets. |  |
|  | Ability to link externally at the KPI, initiative, and activity level for data sourcing purposes. |  |
|  | The solution must be able to retrieve data from external data systems and databases |  |
|  | The ability to automate data acquisition at fixed dates  |  |
|  | Errors and discrepancies in data collection (automated and manual) must be logged and reported to the operator with system facility to reset the transferred data on errors and discrepancies |  |
|  | An ability to add strategy maps / templates via document import. |  |

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| Comments for Integration |
| Comments here please |

## Administration, Access, Security

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| --- | --- | --- |
| No. | Requirement | Compliant |
|  | System administrators should be able to add/edit/remove users |  |
|  | Predefined role-based system for different user types to control access. |  |
|  | Each user of the solution must be authenticated individually before access. Authentication is to be done by the user entering user name and password -User identity is the key to accessing organization levels, scorecards, KPIs, drill-downs, reports, initiatives, and comments. |  |
|  | Built-in audit and logging function for view by administrators with appropriate security permissions |  |
|  | The solution must have functionality to limit access to data that requires approval before it is made public. |  |
|  | Auto update to new software versions. |  |
|  | Cloud hosted, SaaS environment |  |
|  | Application access via the Internet using HTTPS |  |
|  | Five (5) gigabytes or more data storage for data and file attachments |  |
|  | Software system and hosting service will provide a micro-second response time for system data display and screen refresh. |  |
|  | If the Contract is terminated for any reason, Vendor will provide a Client database copy of the current and complete database no later than 30 days after termination. There will be no charge. No data can be retained by Vendor in any media (including hard copies) after termination of this contract. |  |
|  | Vendor solution’s will secure and protect data from unauthorized access.  |  |
|  | Administration tools to provide group permission assignments, activity logs, etc. |  |
|  | Database backups will be completed daily, weekly and monthly. Backups will be used to restore data in the event of an outage or incident.  |  |
|  | Vendor will implement and maintain a business continuity and disaster recovery plan that provides for the continued delivery of the Service in the event of a power out, system outage or other circumstances that may interrupt the normal provision of the service. |  |
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| Comments for Administration, security, Access and Support |
| Comments here please |

## Support

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| --- | --- | --- |
|  | Provides on-line training video tutorials |  |
|  | Supported by digital user manual(s)  |  |
|  | Will provide a “help desk” support service |  |
|  | Availability of user tutorials for specific areas of functionality, use cases and/or industry needs |  |
|  | Scorecard and Dashboard implementation support if required |  |
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| Comments for Administration, security, Access and Support |
| Comments here please |

# Pricing

Costs and Compensation: Vendors shall use the following chart to document system costs. Vendors may assume there will be (insert number) Administration users who will create scorecards, dashboards and reports and manage users and security. Vendors may assume there will be (insert number) Updaters who will be inputting and editing data and there will be (insert number) viewers of the data.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Description | Quantity | Implement | Year 1 | Year 2 | Year 3 |
| Software Licencing |  |  |  |  |  |
| Software Maintenance and Support |  |  |  |  |  |
| Professional Services |  |  |  |  |  |
| Training |  |  |  |  |  |
| Additional |  |  |  |  |  |
| Additional |  |  |  |  |  |
| Totals |  |  |  |  |  |

# General Information

## Timelines

1. Questions regarding this RFP must be submitted in writing to the contact names in section 1.4.

2. Proposals must be received by the *(insert department name)* not later than *(insert time and date)* to be considered.

3. In the event that further clarification is deemed necessary this may be obtained by way of vendor interview. Interviews will be held *(insert date and location).*

4. The estimated date of notice of intention to negotiate a contract with the selected proposer is *(insert date).*

5. The estimated date of contract execution is *(insert date).*

## Requirements for Submittal

Vendors will provide the following information in numbered order in their proposals and respond to the questions:

1. Name, local address, phone number, and web address of the firm proposed for this contract.

2. The name (s) and number of years the firm has been in business under current or previous names or additional assumed business names.

3. The name / role and resume for each individual assigned to this project; to include but not limited to the of primary person, primary person back-up and any individual to be provided by subcontract.

4. The name, title and email address of the person authorized to execute a contract on behalf of the firm.

5. A statement outlining any exceptions to the RFP requirements and or clarifications to the requirements.

6. Provide complete pricing for all services and options recommended or offered (see 3 Pricing).

7. Any additional services or software of benefit not specifically required herein, which the vendor offers to provide.

8. Confirm if the vendor is endorsed by the Balanced Scorecard Institute. This will not be a basis for qualification.

9. References listing customers, and their contact information, with similar systems or volume requirements.

10. Caption, cause number, Court, Counsel, and general summary of any litigation pending or judgment rendered within the past 3 years against the proposer.

11. Provide a timeline for the implementation of the system include data conversion, system planning, design, testing, training and go-live.

## Evaluation Criteria

Insert your weighting and evaluation criteria here

# Appendix

Any other information