

Videoconferencing Solution RFP Template

ITA – Premium: Selection Advice



Introduction: How to Use This Tool

Organizations embarking on the selection process for a videoconferencing vendor may elect to issue a Request for Proposal (RFP) after determining their final selection criteria. Use this RFP template when soliciting vendor responses.

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 enterprise and the vendor are completed.

To use this tool, simply fill in the blanks provided or amend the text in dark grey indicated by square brackets. When complete, be sure to delete any introductory, instructional or example text in dark grey and convert all remaining text to black. Be sure to change all text to **BLACK** before printing or sending.

Videoconferencing Solution RFP Template

ITA – Premium: Selection Advice



[Insert Company Logo Here]

[Company Name]
[Company Address]

Request for Proposal for a Videoconferencing Solution

RFP # [Enter number]

Closing Date: [Enter date]

Closing Time: [Enter time]

Videoconferencing Solution RFP Template

ITA – Premium: Selection Advice



Table of Contents

1	STATEMENT OF WORK	5
1.1	PURPOSE	5
1.2	COVERAGE & PARTICIPATION	5
2	GENERAL INFORMATION	5
2.1	ORIGINAL RFP DOCUMENT	5
2.2	THE ORGANIZATION	5
2.3	EXISTING TECHNOLOGY ENVIRONMENT	6
2.4	SCHEDULE OF EVENTS	6
3	PROPOSAL PREPARATION INSTRUCTIONS	6
3.1	VENDOR'S UNDERSTANDING OF THE RFP	6
3.2	GOOD FAITH STATEMENT	7
3.3	COMMUNICATION	7
3.4	PROPOSAL SUBMISSION	8
3.5	CRITERIA FOR SELECTION	8
3.6	SELECTION AND NOTIFICATION	9
4	SCOPE OF WORK, SPECIFICATIONS & REQUIREMENTS	9
4.1	OVERVIEW OF PROPOSED SOLUTION	9
4.2	TECHNICAL SPECIFICATIONS	9
4.2.1	FEATURES	9
4.2.2	PERFORMANCE	9
4.2.3	SCALABILITY	9
4.2.4	INTEGRATION	9
4.2.5	MANAGEMENT	10
4.2.6	SECURITY	10
4.3	DEPLOYMENT AND CONFIGURATION	10
4.3.1	MAIN SITE DEPLOYMENT	10
4.3.2	BRANCH DEPLOYMENT	10
4.3.3	NETWORK CONFIGURATION	10
4.4	SUPPORT AND MAINTENANCE	10
4.4.1	SERVICE PROVIDER	10
4.4.2	PRODUCT HISTORY	10
4.5	ENGAGEMENT METHODOLOGY	11
5	VENDOR QUALIFICATIONS & REFERENCES	11
6	BUDGET & ESTIMATED PRICING	11
6.1	TOTAL COST SUMMARY	11
7	ADDITIONAL TERMS & CONDITIONS	12
7.1	PERSONAL INFORMATION	12
7.2	NON-DISCLOSURE AGREEMENT	12
7.3	COSTS	13
7.4	INTELLECTUAL PROPERTY	13
7.5	RESPONDENT'S RESPONSES	13
7.6	GOVERNING LAW	13

Videoconferencing Solution RFP Template



ITA – Premium: Selection Advice

7.7 NO LIABILITY	13
7.8 ENTIRE RFP	13
8 VENDOR CERTIFICATION.....	13
SCHEDULE “A” NOTICE OF INTENTION	15

Videoconferencing Solution RFP Template

ITA – Premium: Selection Advice



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 Videoconferencing solution to [Organization Name]. 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 [Organization Name] along with any satellite offices. [Organization Name] reserves the right not to enter into any contract, 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

[Organization Name] 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 videoconferencing solution, the number of users for the system, and expected growth.

[Organization Description]

Example: We are a domestic wholesaler and distributor of business paper products. Our product line includes such items as business cards, stationery, envelopes, printer/copier paper, pen/pencils, and file folders. In total, we offer over two thousand products. We have 48 physical sites, with approximately 8,200 full-time staff across these locations, as well as contractors who work remotely.

Currently, we use a legacy videoconferencing solution, but the combination of aging equipment, limited access to support, poor performance, and high administrative burden on technical staff has led to excessive ongoing costs. We are looking for a videoconferencing solution that will allow us to better collaborate across our multiple office locations and improve the productivity of remote parties. We have identified the following objectives:

- *Enhance distributed team collaboration.*
- *Improve group meeting productivity*
- *Eliminate need for IT involvement in meeting setup*
- *Reduce ongoing travel requirements*

Videoconferencing Solution RFP Template

ITA – Premium: Selection Advice



2.3 Existing Technology Environment

The following is a listing of our current videoconferencing environment.

[Existing Videoconferencing Environment]

List the components of the current videoconferencing environment that will be impacted, modified or replaced by the new solution. For example:

- Current endpoints and conference bridges; models and locations
- Age and support status of existing equipment
- LAN/WAN infrastructure by location
- Key uses for existing systems

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. Changes will be communicated by e-mail to all invited bidders.

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

Issuance of RFP	[Date]
Technical Questions/Inquiries Due	[Date, Time, and Time Zone]
RFP Closes	[Date, Time, and Time Zone]
Complete Initial Evaluation	[Date]
Final Award Notification	[Date]

3 Proposal Preparation Instructions

3.1 Vendor's Understanding of the RFP

In responding to this RFP, the vendor accepts full responsibility to understand the RFP in its entirety, and in detail, including making any inquiries to [Organization Name] as necessary to gain such understanding. [Organization Name] reserves the right to disqualify any vendor who demonstrates less than such understanding. Further, [Organization Name] 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 [Organization Name].

Videoconferencing Solution RFP Template

ITA – Premium: Selection Advice



3.2 Good Faith Statement

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

3.3 Communication

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

- 3.3.1 **Vendors' Inquiries.** Applicable terms and conditions herein shall govern communications and inquiries between [Organization Name] and vendors as they relate to this RFP. Inquiries, questions, and requests for clarification related to this RFP are to be directed in writing to:

[Organization Name]
[Department Name]
[Address]
[City, State/Province, Zip/Postal Code]

Attention: [Contact Name]
Telephone: [(Area Code) Phone Number]
Fax: [(Area Code) Fax Number]
E-mail: [Contact Email Address]

- 3.3.2 **Informal Communications** shall include, but are not limited to: requests from/to vendors or vendors' representatives in any kind of capacity, to/from any [Organization Name] employee or representative of any kind or capacity with the exception of [Contact Name] 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.

- 3.3.3 **Formal Communications** shall include, but are not limited to:

Questions concerning this RFP must be submitted in writing and be received prior to [Date, Time, and Time Zone].

Errors and omissions in this RFP and enhancements. Vendors shall recommend to [Organization Name] any discrepancies, errors, or omissions that may exist within this RFP. With respect to this RFP, vendors shall recommend to [Organization Name] any enhancements, which might be in [Organization Name] best interests. These must be submitted in writing and be received prior to [Date, Time, and Time Zone].

Inquiries about technical interpretations must be submitted in writing and be received prior to [Date, Time, and Time Zone]. 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.

Videoconferencing Solution RFP Template

ITA – Premium: Selection Advice



- 3.3.4 **Addenda:** [Organization Name] will make a good-faith effort to provide a written response to each question or request for clarification that requires addenda within [Number of Days (#)] business days. All questions, answers, and addenda will be shared with all recipients.

[Organization Name] will not respond to any questions or requests for clarification that require addenda, if received by [Organization Name] after [Date, Time, and Time Zone].

Indicate how written responses will be addressed.

Example:

All addenda will be posted to our Web site only:

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

3.4 Proposal Submission

Proposals must be delivered sealed to:

[Contact Name and Title]
[Organization Name]
[Department Name]
[Address]
[City, State/Province, Zip/Postal Code]

on or prior to [Date, Time, and Time Zone]. [Organization Name] shall not accept proposals received by fax. Vendors are to submit [Number of Copies (#)] original copy of proposal marked “Original” and [Number of Copies (#)], marked “Copy.” Each original and copy must be individually bound. Please provide one electronic copy on a CD or DVD media. [Organization Name] will not accept proposals delivered via e-mail.

3.5 Criteria for Selection

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 [Organization Name] with a videoconferencing solution identified in the Scope of Work.

Evaluation Criteria:

1. [Criteria]
2. [Criteria]
3. [Criteria]
4. [Criteria]
5. [Criteria]

Example:

1. *Capability of vendor to meet or exceed requirements set forth in Scope of Work.*
2. *Expressed interest in working with [company name].*
3. *Financial stability of vendor.*

Videoconferencing Solution RFP Template

ITA – Premium: Selection Advice



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.*
5. *Apparent likelihood and desirability of proposed system.*

3.6 Selection and Notification

Vendors determined by [Organization Name] who 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 technical 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.

4.1 Overview of Proposed Solution

This section should contain a detailed description of the essential characteristics of the videoconferencing solution. Identify special or distinctive requirements that differentiate the organization's needs from other buyers. Avoid making the specifications unnecessarily specific; this can eliminate viable suppliers.

4.2 Technical Specifications

Please describe in detail how the proposed videoconferencing solution will meet or exceed each of the following baseline requirements.

4.2.1 Features

This section should describe the required features for the proposed videoconferencing solution, such as protocol support (e.g. H.323 and SIP signaling, H.264/H.263 video), data collaboration needs (e.g. slide/presentation sharing), desktop/teleworker client requirements (e.g. firewall traversal), session recording/playback, etc.

4.2.2 Performance

This section should describe the desired performance characteristics for video/audio conferencing. This may include High Definition (HD) capabilities (e.g. 1080p 30fps, 720p 60 fps), wideband audio support (e.g. G.722), intelligent bandwidth management and/or scaling, Quality of Service (QoS) configuration, and performance reporting/statistics.

4.2.3 Scalability

This section should describe the scalability requirements for the proposed solution, including concurrent multi-party conferencing capacity needs, overall port capacity for Multi-point Conferencing Unit (MCU) platforms, multi-site management etc.

4.2.4 Integration

This section should describe the integration requirements for the proposed solution. This may include Active Directory / LDAP integration, calendar/scheduling integration, integration with a third party Unified Communications (UC) platform (e.g. Microsoft Office Communications Server, IBM Lotus Sametime), and potentially third party Web conferencing services or communications tools (e.g. Skype).

Videoconferencing Solution RFP Template

ITA – Premium: Selection Advice



4.2.5 Management

This section should describe the management capabilities of the proposed solution, including details for central management of both vendor and third party elements. Have the vendor explicitly state which administrative capabilities are included in the proposed solution and which are offered at additional cost. Some vendors offer basic built in management plus more sophisticated capabilities as an add-on. Others include advanced management functionality right out of the box. State that ease of use, integration of features, and functionality will be critical factors in videoconferencing solution selection.

4.2.6 Security

This section should describe enterprise security standards and specifications for the proposed videoconferencing solution, including network configuration details. Specific details here may include AES encryption requirements, existing VPN access technologies, etc.

4.3 Deployment and Configuration

Please describe in detail how the proposed videoconferencing solution will meet deployment and configuration requirements.

4.3.1 Main Site Deployment

This section should describe the core videoconferencing hardware deployment and configuration for the primary location. Specific details here may include network/infrastructure planning, bandwidth testing/configuration, room design and configuration, etc.

4.3.2 Branch Deployment

This section should describe requirements for deployment of videoconferencing hardware and functionality to branch locations. Specific details here may include requirements for configuration of branch office systems, remote worker specifications, VPN requirements, etc.

4.3.3 Network Configuration

This section should describe the nature of integration with the present network environment and existing configurations and settings required.

4.4 Support and Maintenance

State a baseline required for support. For example: 5 years 24X7 onsite software and hardware support. Require that a detailed description of standard and extended support and maintenance be provided.

4.4.1 Service Provider

Please state the name of the company which will be delivering service and on-site support for this solution. If service has been outsourced to another firm, how long has this relationship been in effect?

4.4.2 Product History

Please provide a technical roadmap for the proposed solutions. How does the proposed solution fit into the vendor's current product lifecycle?

Please provide a list of policies on firmware updates for the proposed solution. How often are changes released? How is the customer notified about changes? How are they applied?

Videoconferencing Solution RFP Template

ITA – Premium: Selection Advice



4.5 Engagement Methodology

This section should identify any special requirements for how and where the vendor is to carry out work, key responsibilities of the vendor, and any special terms and conditions that are to be included in the contract but are not covered in Section 7, Additional Terms and Conditions.

5 Vendor Qualifications & 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 and/or services 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 its current clients, including:*
 - *Total number of current clients.*
 - *A list of clients with similar needs using similar products and/or services.*
 - *Evidence of successful completion of a project of a similar size and complexity.*
7. *References: Contact information for five references (if possible) from projects similar in size, application, and scope and a brief description of their implementation.*

6 Budget & Estimated Pricing

All vendors must fill out the following cost breakdown for the implementation of their solution for [Organization Name]'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 [Number of Days (#)] days as of [Date, Time, and Time Zone].

6.1 Total Cost Summary

For all available deployment models, 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						
Licensing						
Installation						

Videoconferencing Solution RFP Template



ITA – Premium: Selection Advice

Maintenance						
Documentation & Training						
Project Management						
Miscellaneous						
Other (specify)						
Total:						

Suggested Cost Categories:

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

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

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

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

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 solution, list and describe them here.

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

7 Additional Terms & Conditions

7.1 Personal Information

7.1.1 General

Depending on the circumstances, [Organization Name] may require information related to the qualifications and experience of persons who are proposed or available to provide services. This may include, but is not limited to, resumes, documentation of accreditation, and/or letters of reference. The Respondent should not submit as part of its Response any information related to the qualifications, experience of persons who are proposed or available to provide services unless specifically requested. Unless specifically requested, any such information, whether in the form of resumes or other documentation, will be returned immediately to the Respondent. [Organization Name] will treat this information in accordance with the provisions of this Section [Section Number].

7.1.2 Requested Personal Information

Any personal information as defined in the [Applicable Legislation] that is requested from each Respondent by [Organization Name] shall only be used to *consider* the qualified individuals to undertake the project/services and to confirm that the work performed is consistent with these qualifications. It is the responsibility of each Respondent to obtain the consent of such individuals prior to providing the information to [Organization Name]. [Organization Name] will consider that the appropriate consents have been obtained for the disclosure to and use by [Organization Name] of the requested information for the purposes described.

7.2 Non-Disclosure Agreement

[Organization Name] reserves the right to require any Respondent to enter into a non-disclosure agreement.

Videoconferencing Solution RFP Template

ITA – Premium: Selection Advice



7.3 Costs

The RFP does not obligate [Organization Name] to pay for any costs, of any kind whatsoever, which may be incurred by a Respondent or any third parties, in connection with the Response. All Responses and supporting documentation shall become the property of [Organization Name], subject to claims of confidentiality in respect of the Response and supporting documentation.

7.4 Intellectual Property

The Respondent should not use any intellectual property of [Organization Name] including, but not limited to, all logos, registered trademarks, or trade names of [Organization Name], at any time without the prior written approval of [Organization Name], as appropriate.

7.5 Respondent's Responses

All accepted Responses shall become the property of [Organization Name] and will not be returned.

7.6 Governing Law

This RFP and the Respondent's Response shall be governed by the laws of [Relevant Jurisdiction].

7.7 No Liability

[Organization Name] shall not be liable to any Respondent, person, or entity for any losses, expenses, costs, claims, or damages of any kind:

- Arising out of, by reason of, or attributable to, the Respondent responding to this RFP; or
- As a result of the use of any information, error, or omission contained in this RFP document or provided during the RFP process.

7.8 Entire RFP

This RFP, any addenda to it, and any attached schedules, constitute the entire RFP.

8 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 [RFP ID] issued by [Organization Name]. 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 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 [Number of Days (#)] calendar days as of [RFP Due Date].

Videoconferencing Solution RFP Template

ITA – Premium: Selection Advice



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 [Organization Name] 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:	_____

Videoconferencing Solution RFP Template

ITA – Premium: Selection Advice



Schedule “A” Notice of Intention

[RFP ID]

NOTICE OF INTENTION REQUEST FOR PROPOSAL

From:

[VENDOR ORGANIZATION NAME]
[AUTHORIZED REPRESENTATIVE]
[TELEPHONE NO.]
[FAX NO.]
[E-MAIL]

Please state your intention with regard to the Request for Proposal [RFP ID] by selecting one of the following:

Intends to respond to [Organization Name] Request for Proposal

Does not intend to respond to [Organization Name] Request for Proposal

TO:

[CLIENT ORGANIZATION NAME]
[CLIENT NAME, TITLE, AND ADDRESS]
[TELEPHONE NO.]
[FAX NO.]

Info-Tech Research Group tools and template documents are provided for the free and unrestricted use of subscribers to Info-Tech Research Group services. These documents are intended to supply general information only, not specific professional or personal advice, and are not intended to be used as a substitute for any kind of professional advice. Use this document either in whole or in part as a basis and guide for document creation. To customize this document with corporate marks and titles, simply replace the Info-Tech Information in the Header and Footer fields of this document.