

Strategies to Developing a Successful Technical RFP

The key to ensuring a successful RFP, is taking the time to work with all stakeholder to discover how current systems work, what needs exist, and how software can improve systems and meet needs. Utilizing the suggestions below will help to better understand organizational needs, and then identify potential solutions to be addressed in the RFP.

1. **Reconnaissance** – Reach out to other jurisdictions and learn about their systems, what works, what isn't what was expected, and what would they look for in the future. If possible, find out their budget and timeline. This can be done through emails and phone calls, but we recommend a full-day site visit to see how their system works from the data entry, report generation, and IT/system administration perspectives. Ideally, this should be the first step of the process. By doing this step first you can start defining who needs to be on the project team, who most of the stakeholders are, what records and services you provide will be included in the system, and an initial idea of cost in time and budget. It also provides insight on what to avoid. An important part of this step is to ensure careful notes are being taken.
2. **Identify Stakeholders** – Once you have had an opportunity to experience how other jurisdictions software systems are operating, start compiling your project stakeholder group. People you should consider having in this group include people from all user levels: administrative/data entry personnel, managers, IT department members (note: while the IT team should be a part of the stakeholder group or even facilitate it, they shouldn't be the lead for the project). Consider who will be directly involved in defining the system (actual project team) and who needs to be kept apprised of progress of the project (directors, general public, policy makers).
3. **Identify the Problem(s)** – Start the process by asking stakeholders what systems are causing them pain, slowing their work-flow, or simply not allowing them to execute the organizations mission in a timely, comprehensive way. This can start with a brief outline of where the organization is now, and where it would like to be. Recommendation: after this step, assembling a logic model will help provide all involved better understand the project.
4. **Project Goals and Target Audience** – It is important to have a clear understanding of the project goals and audience that will be impacted before starting work on the What's and How's. Identified goals need to be in line with your broader organizations goals and mission. Taking the time to consider the audience for the proposed changes – who will be impacted? – will help to provide perspective to clearly identify goals and may identify additional stakeholders. Success of this project requires a well-defined communication

plan for the project team and a documented commitment by the team members and their supervisors to complete the project.

5. **Get everyone speaking the same language** – Make sure each of the project team members understands the short term and long-term goals, and the terminology. Items like data dictionary, entity relationship diagram, relational databases, reports, queries, and others will become part of most team discussions. Similarly, having a logical plan noting the steps needed to get a system in place that indicates the demands on each team member supports them prioritizing the work.
6. **Identify the What's and the How's** – This is where the specific detail work comes in – documenting what do you do and how do you do it? Getting to the basics of what is needed and how that need will be met is the focus for the stakeholder group. This includes identifying what specific records will be used, what performance metrics are currently in place and what ones should be added, and what new systems need to be put into place to meet needs, among others. Keep in mind that for each “what” there is a corresponding “how” Examples of this include: How does each service get stated, performed, and completed (a.k.a. business flows). Do you want to move towards an all-digital inspection format or do you need to keep some as paper/pencil? (e.g. record retention policies, documents for legal actions) If you have a time requirement for issuing permits, how will the software keep track of the dates and will there be an alert is something is past due? How can people make payments? Another essential part of this process is to identify other existing systems that the new system will need to be integrated with. Be prepared for many back and forth discussions between the what and the how as you hammer out the details of identifying exactly what is needed and how it should be executed. Most essential for this step is to document a rough draft data dictionary. This is a list of all the different record types and what each record holds (fields).
7. **Identify Subject Matter Experts (SME) and Point of Contact (POC)** – Even before a proposal is selected, and work starts, vendors, and even other staff may have questions about what is being done. Identifying a POC's and SME's will help ensure that the same information is provided to all interested parties. And once work begins, having pre-identified contacts, especially SMEs, will ensure that the vendor is able to find the information that is needed for implementation. You must have on your project team a SME that has documented experience in managing a network or web accessible multi-user database. This may not be someone who is part of your current IT support staff.
8. **Develop a Scope of Work** – Using the information collected, develop a list of everything that the stakeholder group has identified that needs to be changed. Once this is done,

prioritize the list. What are the “must haves” versus the “nice to have”. Even if money is no object, it is usually not practical to try and change everything at once. This will likely involve a lot of back and forth with the stakeholder group, it is important to keep in mind the larger picture of problem solving for the entire organization and the focus of improving public health of the community served. All "must haves" should have a matching description to how the item supports addressing an environmental health need or issue.

9. **Identify Timeline** – Project timelines can vary greatly depending on the project. This is another important area to research. There can be several mitigating factors around the timeline and knowing what those are will ensure the RFP process goes as smoothly as possible. Having a specific, achievable timeline will also improve your relationship with vendors. Word of caution; timelines are often primarily driven by budgets. Identify several funding options and contingency plans.

10. **Identify Budget** – Make sure you take the time to research how much similar systems cost and what the timeline was for RFP assembly, contract negotiations, system development and testing, data conversion, training, and rollout. Keep in mind these basic project management principles: Quality, Price, Time. You can generally have high quality, at a reasonable price, but it will take longer. If you want a low price and quick turn-around, quality will suffer. The must have budget item for any software purchase is service; ensuring that the bugs that come up (and they will come up) will be addressed, and that thorough training on the new system is provided. If you are lucky enough to have in-house resources, training can include having a “Train-the-trainer” requirement so that your organization is able to address training within. Having a firm understanding of costs will also improve your relations with vendors – they will better understand your expectations and limitations. This will also minimize sticker shock when the bids come in. Additionally, plan for sustaining funding. Once in use, the system management, hosting, and other costs will remain an expense that increases over the years. Consider this expense as important as paying the light bill for your office. It needs a line item in your budget.

11. **KISS – Keep It Simple** – It is easy to want to use technical language throughout a proposal for a new technology. That works if everyone is speaking the same language, but if that is not your language – don’t try and use it! Use technical language as appropriate, such as when outlining security requirements, but utilize plain language as much as possible throughout the RFP documents.