SAMPLE REQUEST FOR PROPOSAL (RFP) FOR MENTORING PRODUCTS/SERVICES

(1) <u>**Overview:**</u> (*This part is where you, the client, provide a summary of the vision you have and the specific products/services you are seeking. It is this information on which the prospective vendor will base his/her products/services as well as pricing. It is important to be as precise as possible so that the proposal you receive will meet your needs.*)

The Mentor Program team at XYZ Company is seeking a vendor who can assist in the design, development, implementation, and delivery of a professional mentoring program pilot to encompass about 25 pairs. The business case for mentoring is due to our succession planning efforts as well as diversity, which have resulted in an immediate need to support our critical mission and high-risk individuals. Although we offer coaching and an extensive self-development resources to our employees, we believe that a mentoring program would provide additional support to employees seeking to develop and remain within the company.

XYZ Company has identified over 100 of these high potential individuals within first line management who will eventually be involved in the program. We expect our mentor pool to come from the managerial ranks at the level beyond first line managers up to and including Division Managers. Not all pairs will be within the same location as we are a national company and would expect to have mentors and mentorees from across the company. Our target date for beginning the process of creating the pilot is March 1, 20xx.

After the program has been successfully piloted, it is expected that the program will become available throughout the organization. We currently have 5,000 employees.

We do not currently have a formal mentoring program though we know that informal mentoring takes place among many of our employees. The program is being championed by our Vice President of Diversity, as this is part of an initiative to create a level playing field for all first line managers. We have not yet designated a program manager, but we do have a team in place that has been exploring mentoring and would be involved once a vendor is selected.

(2) <u>Scope of Services:</u> *(This is where you, the client, outline the specific services you're asking the vendor to bid on. Be thorough.)*

The objective of the vendor is to provide support with respect to incorporation of industry best practices specific to process design and implementation of a pilot mentoring program. The selected vendor is expected to provide sound methodologies that have been developed and used successfully with other clients.

Specific objective areas of support to be provided by the vendor include the following:

- Vendor provides mentoring program framework
- Vendor provides tools to determine the success of the effort from an organizational and an individual perspective (tracking database).
- Vendor provides Train-the-Trainer for up to X number of employees. Those employees receive instruction in the training presentations and practice leading the exercises to be conducted with future program participants. The instructors also receive an in-depth briefing on the learning theory and methodology behind the various segments of the program.
- Vendor provides a list of tools and materials to be used during the entire process.
- Vendor provides training and guidelines on mentoring for both mentors and mentorees
- Vendor provides orientation for immediate managers on their role within the mentoring program
- Vendor outlines criteria for Mentor/Mentoree pairing. A quantitative/qualitative measurement for pairing two compatible individuals.
- Vendor provides guidelines and a plan of action for initial program evaluation – documented plan that describes how the organization will effectively evaluate program success.
- Vendor provides sample survey questions that solicit what the Mentor/Mentoree is looking to accomplish during the selection process.
- Vendor should also include a suggested methodology for expanding the program after the success of the initial pilot program.
- Vendor should specify any certification process they provide for mentors, program managers, or trainers.
- If an online tool is recommended, vendor will respond to questions in Section X of this RFP.

(3) <u>RFP Schedule & Process:</u> *(Think of this section as your terms and conditions. Deadlines are critical here.)*

XYZ Company anticipates the RFP process to follow the schedule below; however, XYZ Company retains all rights to add days and/or events to the schedule. In the event that XYZ Company changes the schedule, all vendors will be notified. Notwithstanding the foregoing,

XYZ Company will give vendors the amount of time to meet vendor deliverables as indicated in this schedule. Requests for extensions of the Response Due Date will NOT be granted.

Timeline

- 10/29/xx 2:30 PM XYZ Company issues RFP
- 11/09/xx Vendor – Last date for vendor to notify XYZ Company contact of intent to submit a proposal.
- 11/30/xx 5:00 PM Vendor - Final Proposals Due.
- 01/15/xx XYZ Company notifies vendors of decision concerning the RFP

Communications

Vendor contact with XYZ personnel pursuant to this RFP shall be restricted to the XYZ Company contact named below and in accordance with the terms described herein. Only those communications submitted to this individual will be considered as a duly authorized expression of the vendor.

XYZ Contact Information

John D, Organizational Development Manager and key contact for RFP at (555) 555-5555 or email: jd@xyz.com

Vendor Questions

All questions should be clear and concise and submitted in writing to the above contact to avoid any confusion. Telephone contact as follow-up is permissible.

Proposal Preparation and Delivery

Proposals should be simple and economical, providing straightforward, concise delineation of a vendor's capabilities to satisfy the requirements of the RFP. Two copies of the proposal should be submitted via US Postal Service and received by XYZ Company no later than 11/30/xx. Any proposals received after that date will be rejected. The proposal must be sent to the following address:

<div align="center">

Mr. John Doe, Director of Diversity
XYZ Company
123 Main Street
Plainville, NJ 90954
Mentoring RFP Response

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Evaluation Criteria

As this RFP is the critical component in the selection process, it is vital that you answer each survey question in full, be technically complete, clear, legible, concise, and responsive for full representation in the process and in order to provide an adequate basis for evaluation. The RFP will be judged in part on the quality and thoughtfulness of the answers given. All vendors are required to adhere to the same rules with respect to responses to this RFP. Any vendor who submits an incomplete response or who does not respond to this RFP within the requested guidelines and formats may be eliminated. All RFP information will be kept confidential by XYZ Company and will not be shared with competitors of the vendors submitting a response.

Vendor Presentations

If deemed necessary by XYZ Company, vendors may be requested to clarify their proposal and/or present their proposal orally to XYZ Company. XYZ Company will notify vendors in the event such a presentation is necessary.

Award Decision

Although XYZ Company intends to use the results of the RFP in making its vendor award, such decision may be based on a variety of factors, and is also subject to changes due to information and business conditions that are received or occur after the RFP. The decision to award business to a specific vendor is subject to XYZ Company's sole discretion. XYZ Company makes no commitment to purchase product/service from any vendor until the appropriate legal documents are signed by both parties and a Purchase Order has been opened.

XYZ Company reserves the right to accept or reject any and all bids and to award its requirements to a single vendor or to multiple vendors. All vendors will be notified of a decision once it is reached.

Between the conclusion of the RFP process and the award notification, Vendors who submitted the lowest cost proposal in the online event should not assume that they are the winning vendors, and should not take any actions that are based on that assumption. The lowest cost proposal does not automatically become the winning proposal.

(4) <u>**Vendor Responses to RFP**</u>: *(These are your "vetting" questions. Think of all the questions you'd like to ask the vendor about experience, depth of services, etc)*

1. Provide a brief summary of your experience in designing and implementing mentoring programs?
2. Who will be the lead person on this project and what is his or her background? A brief summary is sufficient or you may attach a resume with the proposal.

3. Describe your mentoring program framework – what is mentoring as you see it?
4. Describe your process for designing a mentoring pilot. Please describe how you incorporate diversity considerations.
5. Describe the model or models you would recommend for the pilot program.
6. Describe the role, if any, of the mentoree's immediate manager in the mentoring process.
7. Describe your process for implementing a mentoring pilot.
8. Describe your process for matching pairs. What methodology do you use?
9. Describe the training component for mentors and mentorees. Provide a list of tools/exercises you use.
10. Describe ongoing support you recommend be conducted by the mentoring program manager and what support you provide him/her during the pilot.
11. Describe how you evaluate program success. Provide sample questions used in any survey you conduct.
12. Provide a typical implementation timeline from design to final evaluation of program.
13. If you provide a train-the-trainer component, describe the process.
14. Describe how you have assisted other companies in expanding a mentoring pilot to other parts of the company.
15. Do you certify the mentoring program manager and, if so, describe the process?
16. If you provide or recommend an online tool, please answer the questions that follow in Section (5) Online Mentoring Solution.

(5) Online Mentoring Solution: *(This is where you'd ask relevant questions regarding an online mentoring solution, including your specific questions about the solution's capabilities.)*

1. Provide previous experience delivering an online mentoring tool.
2. Describe the system's ability to support various types of mentoring. Specifically, explain how the system supports the following three types or combination.
   o **Managed pairs:** pairs that are matched by a program manager and which allows the program manager to monitor pairs on a regular basis
   o **Self-directed pairs:** pairs that match themselves either by mentoree or mentor initiative with limited oversight on the part of the mentoring program manager
   o **Group mentoring:** a mentor with multiple mentorees who meet as a group on a regular basis. The matching is conducted by the program manager or mentors and mentorees may select their own group.
3. Describe the system's ability to customize existing functionality and/or look and feel as requested by XYZ Company. Describe the process for adding a functionality specific to XYZ Company that the system does not currently have. Also describe the system's scalability capabilities as we expand the pilot program to other parts of the company.
4. Describe the system's capabilities in terms of:

- Collecting data from users to create an effective match. Provide a sample of data collected
- Matching pairs. How are mentorees able to select preferences for what they want out of a mentoring partnership? How does the system generate matches and how can the data be filtered to arrive at matches in a timely and effective manner?
- Ongoing maintenance. How does the system track progress of pairs? What features in the system allow for monitoring whether the pairs are effective?
- Measuring capabilities. How does the system support measuring success and what specifically is measured?

5. Describe any interface capabilities the system has with respect to linking to a company's human resources database to retrieve user data.
6. Describe any resources that are available to support the mentoring pairs in their work and their relationship.
7. Describe any social networking capabilities within the system.
8. Describe any elearning capabilities the system has.

__Additional Data:__ Beyond the technical capabilities of an online system, there are two other components that a company may or may not opt to gather about the system's environment during the RFP process: technical specifications of the system as well as the security capabilities of the system. A decision to include this is also impacted by whether the online solution is hosted by the vendor or by the company. A hosted solution does not require that a company have a lot of data on the technical specifications because the vendor maintains the system within its server. All that is usually required is for a company's internal IT department to allow employees to access the hosted solution's online web address and allow emails to come from the system (support@abccompany.com). As a result, there is no need to have IT involvement and there is no long implementation timeline with a hosted solution.

With a system that is brought inside a company's IT system, IT should be involved with asking questions that address their concerns, especially how easily the system can be imported, what kind of lead time is necessary, and what kind of costs are involved. In this model, we provide some sample questions.

Security concerns, however, will be important whether you have a hosted or non-hosted solution. You will want to know what happens to the data submitted, how it's protected, etc. So security questions should form part of your RFP regardless of the type of online solution you are seeking. Samples of these questions are included in this model as well.

(6) System Environment: *(Here's where you request the nitty-gritty on technical info.)*

1. What web server technology or technologies do you use?
2. Briefly describe how you track session state.
3. Briefly describe how you have implemented load balance.
4. Briefly describe how you monitor application performance.
5. Do you host the system, or do you outsource. If outsourced, to whom?
6. What mechanism do you use to authenticate users?
7. What methods do you support to exchange data with clients?
8. Are you able to redirect users if the system becomes unavailable, and, if so, how?
9. Is any data sent to a third party? If so, to whom and what are the security measures to protect the data?
10. List operating systems supported.
11. How are backups conducted and how often?
12. What technical support do you provide to users?
13. Does your system integrate with email/calendar programs?

(7) Security Environment: *(This is where you request the nitty-gritty info on security issues.)*

1. Describe your security environment to protect the data submitted by clients and users.
2. What security standards is your security program based? (e.g. ISO 17799, ISO 27001 etc.)
3. Who has access to backups and servers?
4. Are backups encrypted?
5. How do you ensure that your system is current with security updates?
6. Do you use any host or network Intrusion Detection System?
7. How often do you scan your system for vulnerabilities?
8. What measures do you have in place to protect unwarranted access to client data?
9. Describe your process for removing or deactivating access for user accounts when a person is no longer with the organization and for a person who no longer needs the level of access he or she currently has.
10. Discuss your password management requirements.
11. Describe your disaster recovery plan.
12. Do you have a privacy policy easily accessible and visible to users of the system?
13. Do you have a Safe Harbor policy and certification?

Pricing: *(Make sure you request information on ALL fees.)*

Please provide pricing as indicated.

Item Name	Item Number	Item Quantity	Item Type	Unit of Measure
Consulting Fees				Fees
				Bid Required
				Yes
Minimum Price	**Maximum Price**	**Allow Partial Quantity Bids**	**Minimum Quantity**	**Maximum Quantity**

Item Name	Item Number	Item Quantity	Item Type	Unit of Measure
Training Fees				Fees
				Bid Required
				Yes
Minimum Price	**Maximum Price**	**Allow Partial Quantity Bids**	**Minimum Quantity**	**Maximum Quantity**

Item Name	Item Number	Item Quantity	Item Type	Unit of Measure
Online System License Fee				Annual fee and 3-year license fee
				Bid Required
				Yes
Minimum Price	**Maximum Price**	**Allow Partial Quantity Bids**	**Minimum Quantity**	**Maximum Quantity**
		No		

Item Name	Item Number	Item Quantity	Item Type	Unit of Measure
System Implementation Fees				Total Cost
				Bid Required
			N	Yes
Minimum Price	**Maximum Price**	**Allow Partial Quantity Bids**	**Minimum Quantity**	**Maximum Quantity**
		No		

Item Name	Item Number	Item Quantity	Item Type	Unit of Measure
Other fees (specify)				Total Cost
				Bid Required
				Yes
Minimum Price	**Maximum Price**	**Allow Partial Quantity Bids**	**Minimum Quantity**	**Maximum Quantity**
		No		

Here are ways you can display the pricing grids:

		Year 1	Year 2	Year 3
User Licensing	**Cost per User (USD) per year**	$0.00	$0.00	$0.00
1-250 users (Pilot Launch)	$0.00	$0.00	$0.00	$0.00
Service/ Hosting Fees		$0.00	$0.00	$0.00
Maintenance and Support		$0.00	$0.00	$0.00
Hosting	$0.00	$0.00	$0.00	$0.00
Training services	$0.00	$0.00	$0.00	$0.00
Other Costs (provide specifics in "Pricing Worksheet 2 Tiered")	If Applicable	$0.00	$0.00	$0.00
	TOTAL	**$0.00**	**$0.00**	**$0.00**

Grand Total	**$0.00**

---See next page for more examples---

User Licensing	Cost per User (USD) per year	Year 1	Year 2	Year 3
		$0.00	$0.00	$0.00
251-500 users	$0.00	$0.00	$0.00	$0.00
501-1,000 users	$0.00	$0.00	$0.00	$0.00
1,001-2,000 users	$0.00	$0.00	$0.00	$0.00
2,001-5,000 users	$0.00	$0.00	$0.00	$0.00
5,001-10,000 users	$0.00	$0.00	$0.00	$0.00
>10,000 users	$0.00			

Other costs (provide specifics below) in USD		Year 1	Year 2	Year 3
		$0.00	$0.00	$0.00