

RFP Intake Form

The purpose of this form is to compile clearly defined specifications and needs for new products or services. The information received on this form will be used by the Office of Procurement Management to release formal invitations to vendors to submit proposals or pricing.

RFP Title

Provide a title for this RFP project or purchase. For Example: NSU Email Archive

What is the projected budget for this project?

Is this request associated with a sponsored award managed by the Office of Sponsored Programs? Yes / No

Vendor Activity

Define successful vendor's anticipated interaction with NSU to provide delivery, deployment, training or implementation (check all that apply):

YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	Vendor will come on NSU campus
<input type="checkbox"/>	<input type="checkbox"/>	Vendor will provide services only.
<input type="checkbox"/>	<input type="checkbox"/>	Vendor will provide equipment only.
<input type="checkbox"/>	<input type="checkbox"/>	Vendor will provide services and equipment (if components need to be replaced).
<input type="checkbox"/>	<input type="checkbox"/>	Vendor will access NSU's data or systems.
<input type="checkbox"/>	<input type="checkbox"/>	Vendor will be permitted to utilize subcontractors.

Kick-off Meeting Date: Click or tap to enter a date.

Project Completion Date: Click or tap to enter a date.

Vendor Participants

Provide list of suggested vendors. Procurement will validate this list and suggest additional qualified vendors (if applicable).

Organization Name	Contact Name	Email Address	Phone Number	Incumbent Y/ N

NSU Stakeholders

Provide complete contact information for the project owner and all NSU stakeholders to be included in emails, meetings and communications regarding this RFP.

Project Owner Name	Project Owner Email Address	Department
Stakeholder Name	Stakeholder Email Address	Department

Statement of Purpose

In 1 or 2 brief sentences, describe the purpose of the project. For example: NSU seeks to partner with a vendor to provide a cloud-based email archiving solution.

Background Information

*Present all relevant details about NSU's **current** systems, number of users and data which describes our current environment related to this RFP. Identify our current (specific) problem which will be solved by proceeding with a purchase of these goods or services.*

Scope of Work (Requirements) – Attach Additional Document if Necessary

Specify exactly what NSU needs accomplished including any specific equipment that must be provided by the vendor or a detailed list of expected outcomes. This section should be detailed yet clear and concise. Provide answers to common questions that vendors will have regarding who, what, where & when.

Vendor Questions

Provide a list of questions that you would like all bidders to answer as part of their RFP response.

Deliverables

Provide a list of all products, reports and plans that will be delivered to NSU subsequent to a purchase of these goods or services.

Training (if applicable)

If training is required, specify what kind of training (for example: train the trainer or end-user training). How much training is needed and what format (online? In person)?

Support (if applicable)

Specify who must provide and what kind of support is required. (for example: 5-year manufacturer warranty or 24/7 toll free support or 24-hour swap of non-functioning equipment or dedicated support engineer)

Vendor Certifications or Resumes (if applicable)

Specify which industry certifications are required of the vendor. For example: Copy of Microsoft Office certification required.

Additional Vendor Requirements

This section pertains to vendor requirements during the RFP process. Select all that apply and provide additional information as required. For example: Site surveys are held to allow vendors the opportunity to see NSU specific spaces which relate to the scope of work.

<input type="checkbox"/>	Bidder conference call will be held during RFP process.
<input type="checkbox"/>	Bidder conference call is not needed.
<input type="checkbox"/>	Site survey visit will be held during RFP process.
<input type="checkbox"/>	Site survey visit is not needed.
<input type="checkbox"/>	Vendor presentations will be required as part of the RFP process.
<input type="checkbox"/>	Vendor presentations are not needed.

Bidder Conference Call

If bidder conference call is required, please provide bridge details (phone in number) and at least 3 available schedule timeslots to hold call.

Conference Phone #	Date / Time	Date / Time	Date / Time	Date / Time

Site Survey

If site survey is required, please provide exact meeting location (address), NSU point of contact for survey, date and time for survey to occur.

NSU Contact Person	Building Name	Floor & Room Number	Site address

Vendor Demonstrations

If vendor demonstrations are required, please specify delivery format desired (in person, WebX etc) and provide at least 4 available schedule timeslots to hold demos.

Format	Date / Time	Date / Time	Date / Time	Date / Time

COMPLETING AND SUBMITTING THE FORM

Complete all applicable sections in the Sourcing Intake Form. The spaces provided will be enough for most sourcing requests. However, to facilitate the need for additional spaces for proposed participants, product details, service details, and/ or additional questions for bid participants; you may attach a separate document.

When complete, submit your form via email at purchasing@nova.edu or by attaching the form to your Ariba Purchase Requisition. A dedicated team of procurement staff members will be assigned to facilitate, monitor, and communicate the status of this sourcing event with the designated primary contact listed in the form.

Requesting Department Approvals

Requestor Name Requestor Signature Date of Signature

Dean or VP Name Dean or VP Signature Date of Signature

Office of Procurement Services Director Office of Procurement Services Director Signature Date of Signature