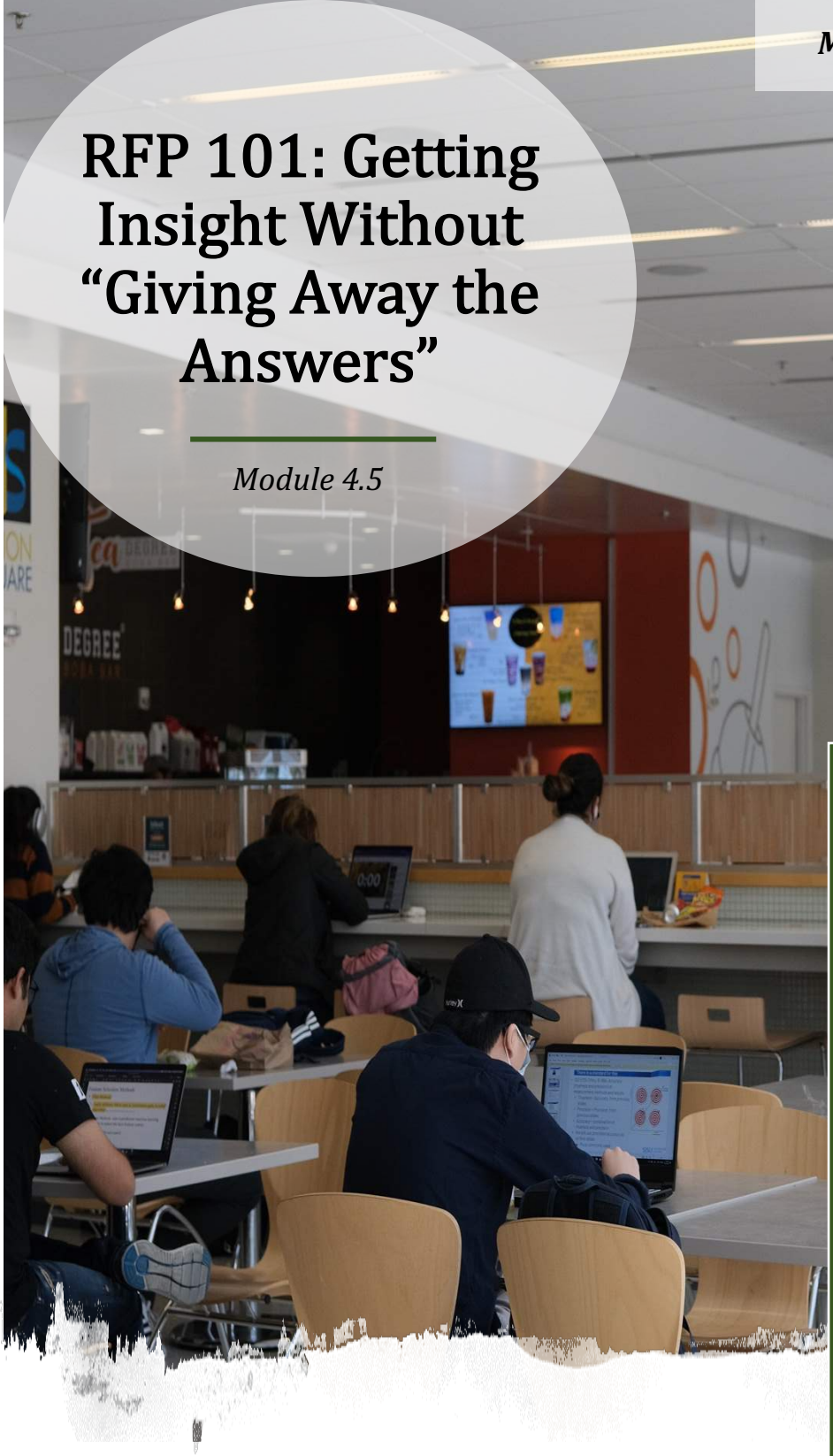
# RFP 101: Getting Insight Without "Giving Away the Answers"

*Module 4.5*



## Contents



This resource will be most useful for technology procurement teams and/or individuals leading RFP-writing for student success technology

COMPLETE COLLEGE AMERICA

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# Introduction: RFP 101

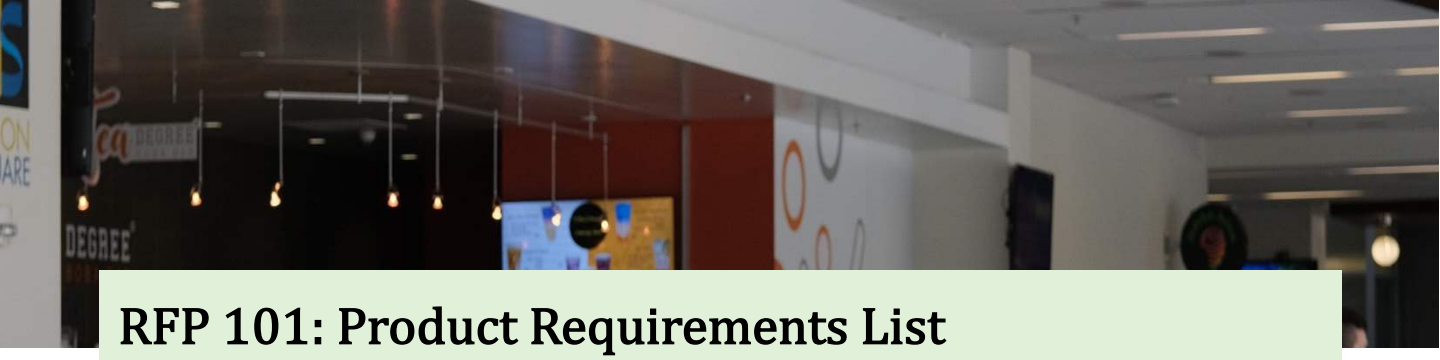
While the task of writing an RFP may seem challenging, it is often an inevitable step for sourcing the most suitable technology solutions for your institution's unique needs. Faced with a complex and ever-changing technology landscape, leaders can sometimes be tempted to copy-paste RFP language from others, overlooking the opportunity to create a document that truly reflects their institution's requirements and objectives. Unfortunately, these one-size-fits-all RFPs tend to elicit generic and vague responses from vendors, making it tougher to differentiate between them.

Conversely, a well-crafted RFP strikes a balance between articulating your product needs and inquiring about potential solutions, allowing vendors to showcase their expertise and approach. Strong RFPs can yield responses that offer concrete insights into more nuanced product attributes, product compatibility with your current ecosystem, and each vendor's implementation strategy.

The following section builds upon the prior sections of this module to guide you toward an RFP that can get your team the insights they need without "giving away the answers" and enabling vendors to respond with what they think you want to hear (rather than what they truly are able to provide).

In the coming pages we will:

- Turn your user stories into RFP-ready product requirements
- Explore the architecture of a strong RFP (and view some exemplars for inspiration)



# RFP 101: Product Requirements List

## Translate End-User Stories Into Product Requirements

User stories help to clearly define the product features, functionality, and user experience that your team needs. However, all features have multiple technical and data requirements. As you move forward in the procurement process, it will be important to not only be able to describe *what* you want the product to do (user story) but also, to be able to explore *how* the feature will need to work within your ecosystem.

For example, say you have the following user story:

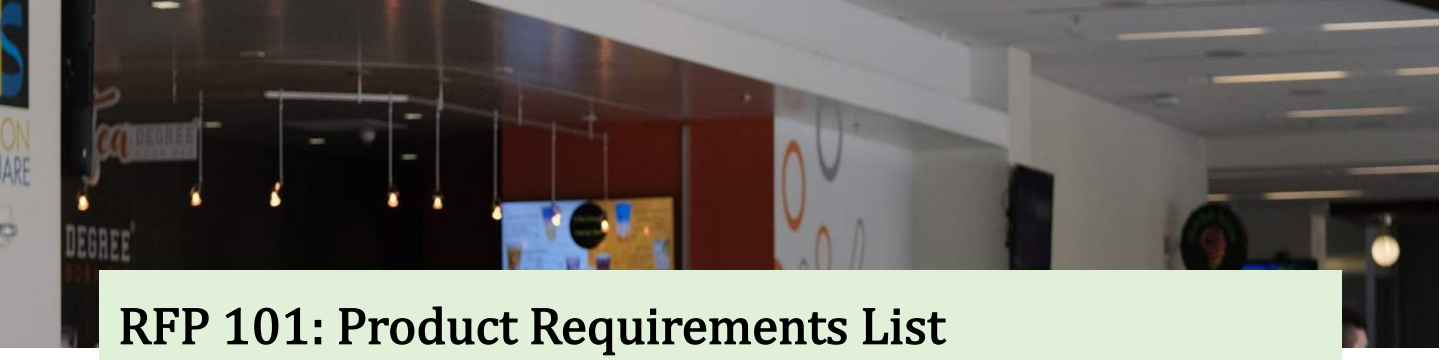
> *Advisor and support staff can easily see a student profile with classes, recent communication, grades, and notes form other support staff and faculty.*

This provides a good summary of the user experience and functionality of a tool, but what about the data and integration requirements? Perhaps several vendors and products can hypothetically produce this functionality, but do they know how to work with your specific student information system (SIS)? This is where unpacking user stories into a more robust list of product requirements comes in.

**Step 1:** If you have not yet done so, Collect all user stories that represent prioritized capabilities you would like to buy (Refer to Module 4.4 on prioritization).

*Sample*

| **User Story** *One per line, specify user title and function (e.g., Advisor can…[action],” Faculty can…[action]”, etc.)* | **Do We Already Have This Capability? (Y/N)** **If ”Yes”, What Is The Name of the Existing Tool?** | | **Next Step:** *Indicate:* • *Buy* • *Build On Existing* • *Improve Usage of Existing* | **Priority Level** |
|---|---|---|---|---|
| Advisor and support staff can see student profile with classes, recent communication, grades, and notes from other support staff and faculty | N | N/A | Buy | High |



# RFP 101: Product Requirements List

## Translate User Stories Into Feature and Product Requirements

**Step 2:** Share these user stories with IT leaders, IR and data managers, and leadership. While user stories will describe the tool's appearance and functionality, these leaders should weigh in on the technical, data, and configuration requirements needed for each of the stories. To help you get started, see a few of the sample questions you might try with each of the stakeholders below.

### Interview Question Bank: Gathering Product Requirements

#### IR/Data Managers

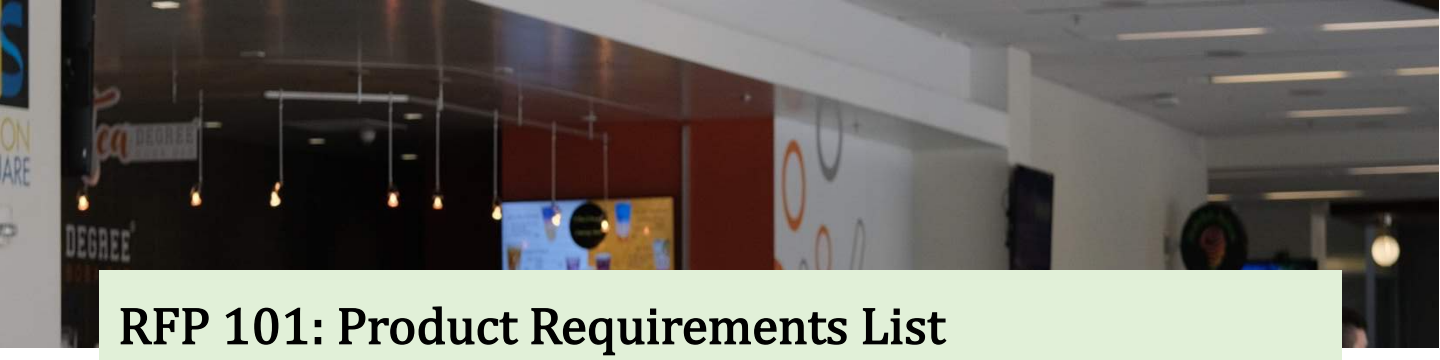
- What data tables do we need to access to populate this tool? Is our data robust and clean enough to support this?
- What data fields would we need in the tool?
- Other data requirements that would be needed to support this feature?

#### IT Staff

- What integration would be required for this functionality?
- With which systems?
- Other technical requirements that would be needed to support this feature?

#### Leadership

- Who should have access to different types of information in this tool?
- Who should be able to access different capabilities in this tool?
- Other considerations about the vendor (e.g., culture, experience)?

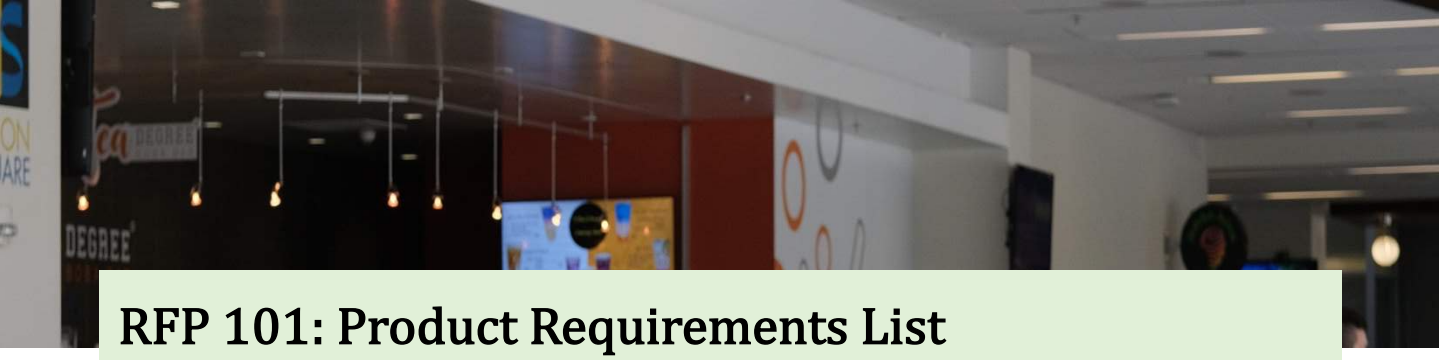


# RFP 101: Product Requirements List

## Translate User Stories Into Product Requirements: Example

**Step 3:** Work with IT, IR, and Leadership to develop a comprehensive list of requirements. See below for an example of how stakeholder interview responses can help to move from a user story to a list of product requirements.

| | User Story | IT/IR/Leadership Interviews | Product Requirements |
|---|---|---|---|
| Example | Advisor and support staff can see student profile with classes, recent communication, grades, and notes from other support staff and faculty | *"We'll need something that will integrate with the LMS so we can get student grades and faculty notes."*<br><br>*"We'll also need to pull information from the SIS for the student profile"*<br><br>*"I think we'll want to restrict access to some of the notes from counselors – that can be potentially sensitive."* | • User-friendly, interactive student profile page with fields listed in user story.<br>• Ability to pull faculty notes and student grades from our Canvas LMS<br>• Ability to pull student information from Banner<br>• Ability to configure permissions for different users (advisors, support staff, counselors) |




# RFP 101: Product Requirements List

## Translate User Stories Into Product Requirements: Worksheet

| **User Story**<br>*Refer to Modules 4.2 and 4.4* | |
|---|---|
| **Interview Notes:**<br><br>*Suggested stakeholders:*<br>• *IT Representative*<br>• *IR or Data*<br>• *Leadership* | |
| **Product Requirements**<br><br>*Should include user experience bullet points from user story as well as technical, data, integration, and other considerations from stakeholders above.* | |

# RFP 101: The Architecture of a Strong RFP

## RFP Architecture Overview and Examples

### RFP Introduction: Explain Existing Technology Ecosystem and Project Context

The first few paragraphs of your RFP should ideally help the vendor to understand your institution's unique context. Things like your technology ecosystem, governance structure, and operations can deeply affect both the kind of solution the vendor pitches as well as the cost of that solution. In this section, effective RFPs include:

- Overview of Existing Technology Stack
- Relative Centralization or Decentralization
- Uniformity of Process Across Campuses/Departments

**Example:**
*"Currently, the **three campuses** that make up our college all use a **single Banner 9 SIS and Canvas LMS**. Our **support offices**, including financial aid, orientation, and tutoring, among others, are all located at our Central Campus, but each of the other two campuses also have smaller tutoring centers as well. The Central Campus offices all **use SchedulePro**, which we hope to replace with our new tool."*

### Set Expectations

After you've described your institution's current situation, the next section of your RFP should focus on your future vision and goals. This helps vendors to understand the "why" behind your procurement effort, which can then enable your team to see which vendors seem most aligned to your needs and goals. In this section, effective RFPs include:

- Relevant Reform Efforts and Goals
- Expected Role of Technology in Goal Attainment
- Intended Outcomes

# RFP 101: The Architecture of a Strong RFP

## Set Expectations (Continued)

**Example:**
*"Fiction College is **piloting a new orientation and onboarding process**, as well as **transitioning to a case management model for advising**…we seek a solution to guide students through their journey while allowing advisors, support staff, and faculty to coordinate efforts to keep students on-path. Our 5-year goal is to **reach an 85% graduation rate**, a 5-percentage-point increase over our current graduation rate.*

## Provide System Requirements and Ask Questions

Now, onto the core of your RFP. Use the product requirements from earlier in this module for reference. Strive for balance: combine statements (e.g., "Must have feature description x.") with open questions (e.g., "Describe how your product handles x process."). Why? Overly prescriptive in RFPs let vendors "off the hook" in describing how they uniquely approach specific goals. Consider a checklist for simpler asks and open questions for items that are more complex. Effective RFPs often organize their requirements into the following sections:

- Company Background and Culture
- User Interface and Workflow
- Product Capabilities
- Cost Structure
- Implementation Approach

**Example:**
*"Requirement: Student-facing onboarding and application portal"*

*Question 1: Our students come to us with a wide variety of initial intentions and goals – creating challenge to ensure we provide appropriate onboarding given their particular goals. **Describe how the solution will provide** for multiple types of application for admission, both credit and non-credit."*

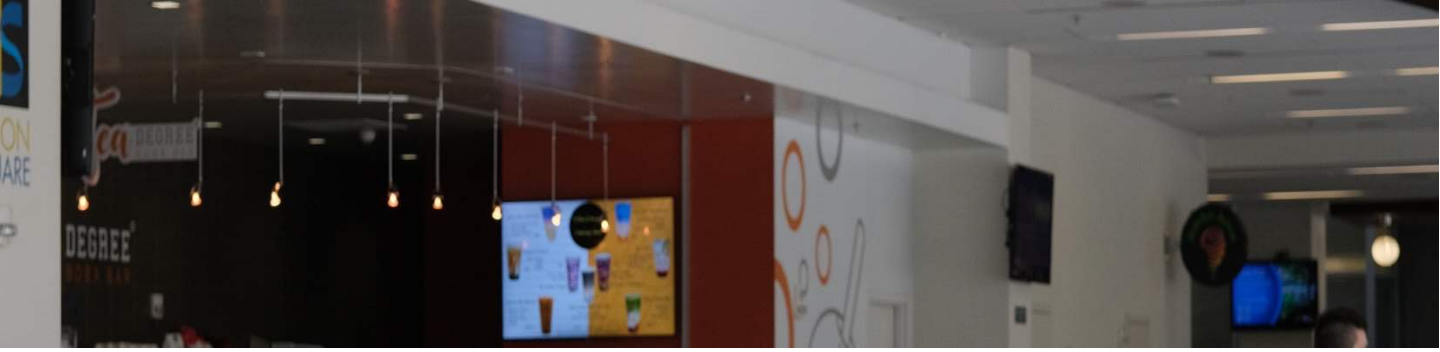
# Next Steps

Congratulations! With RFP in hand, you're ready to begin evaluating vendors and picking out a product that will hopefully support your institution's student success goals. In the final section, we have a series of vendor engagement tools to help support your evaluation process and move toward a final procurement decision.

- [x] *Read* Module 4.1 How Should We Approach Buying New Technology?
  - <1 hour
- [x] *Watch and Complete* Module 4.2 Creating "User Stories" to Guide Procurement – Webinar
  - 3-4 hours
- [x] *Review and Complete* Module 4.3 Check Your Basement: Avoiding Duplicative Technology
  - 2 hours
- [x] *Watch and Complete* Module 4.4 How Can I Prioritize Competing Technology Needs? – Webinar
  - < 1 hour
- [x] *Read and Apply* Module 4.5 RFP 101: Getting Insight Without "Giving Away the Answers"
  - 3-4 hours
- [ ] *Read and Apply* Module 4.6 Vendor Engagement Toolkit
  - 1-2 hours

*Module 4.5 Individual Reflection:*

1) With whom might you need to share your draft RFP?
2) Does your RFP reflect the prioritized needs of the end-users you interviewed in Module 4.2? If not, why not? What might need to be considered to ensure the product you procure is aligned to your institution's needs and goals?




## About This Series

This five-part instructional series on Student Success Technology is designed for minority serving institutions (MSIs) and their friends. Taken together, these instructional resources aim to provide practitioners with the tools to establish and maintain a technology ecosystem that effectively supports the institution's broader student success and equity goals. The exercises and resources within these modules are also widely applicable across the higher education field.

This resource was compiled with generous funding from the Bill & Melinda Gates Foundation and was authored by The Ada Center based on six years of insight from The Ada Center's work with hundreds of MSIs and access-focused institutions. The curriculum would not be possible without the thought partnership and support from Complete College America and the Advising Success Network.

For additional curriculum modules, please visit:
www.completecollege.org/navigating-student-success-technology

For questions about this resource, or to explore additional higher education technology research and tools, please visit www.theadacenter.org/resources.

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