

Simplify your OCIO Search.

The Planning Phase

- ☐ **Gather information about your organization.** This will help providers tailor their responses to your organization and needs.
 - Background/mission
 - Issues/challenges
 - Asset information
- ☐ **Compile the questions you feel are the most relevant to your organization.** Don't go overboard or lose focus. Remember, you'll have to review all the responses. Ask only the questions that are truly important to your decision.

Resources:

[Build Your Own RFP](#) – Select categories of interest and get the right questions to ask.

[Top 10 Questions to Consider](#) – Important questions and detailed criteria to include in your RFP.

- ☐ **Create the list of organizations you would like to complete your RFP.**
 - Consider a non-disclosure agreement
- ☐ **Define your evaluation team, process and criteria.**
 - Determine your RFP review team members
 - Build in a formal question period where providers can request additional information
 - Create review timeline
 - Create scoring methodology with critical areas receiving the most weight

Resource: [Video: How to Run an Effective RFP Process](#)

- ☐ **Generate specific provider instructions so they can meet your expectations.**
 - Response format
 - Response length
 - Number of copies needed
 - Due date(s)
 - Expected timeline for next steps in the process

The Evaluation Phase

- ☐ Seek clarification to responses that are unclear or incomplete.
 - ☐ Consider providers capabilities at the highest level.
 - Can the organization understand and meet our goals?
 - Do they have the resources needed to fulfill our requirements?
 - Is the cost competitive?
 - ☐ Compare responses to your most heavily weighted questions.
 - ☐ Select finalists from the larger pool to present their solutions to your organization.
 - Identify key individuals to attend presentations of your provider finalists
- Resource: [How to Structure and Run a Finals Presentation](#)

Have questions?

We're one of the first providers of OCIO services, with more than 25 years of RFPs under our belts. And we know how important it is to find a strategic OCIO partner that best fits your desired governance structure. We'd love to schedule an introductory meeting and help provide insights into the best delegation model for you.

**Contact us at 866-SEI-2441 or email institutions@seic.com
for information about how our OCIO solution
can benefit your organization.**