

**THIS PAGE SHOULD BE REMOVED – NOT INTENDED FOR INCLUSION.**

### **Using this template.**

This template is intended for organisations looking to procure a Cookie Consent Management Platform (CMP), enabling them to ‘buy smarter’ and make a more informed purchasing decision. Using the template should save organisations the considerable time, effort and money involved in producing a comprehensive RFP document.

The template covers the key requirements of a CMP across departmental functions and explores the ‘art of the possible’ so that organisations may evaluate and compare CMP vendor offerings; safe in the knowledge that the most important privacy, regulatory, user experience, service efficiency, management and cost implications have been thoroughly examined.

### **Requesting alternative format.**

A word version of this document is available on request, please email [we-are@rethinkingprivacy.com](mailto:we-are@rethinkingprivacy.com) to request a copy, this will be provided at no charge.

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### **Warranty**

This template is provided without any warranty, support or additional service. In using; in part or whole, you accept sole responsibility for such usage.

# Request for Proposal

[PROJECT TITLE]

[YOUR COMPANY NAME]

PROPOSALS DUE BY: [DATE PROPOSALS WILL BE ACCEPTED UNTIL]

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## **Company Background**

*A brief, high-level description of what your company does and who you serve as a target market.*

[EXPLAIN COMPANY IN 1-2 SENTENCES]

## **Project Overview**

A *brief* introduction to the project.

[EXPLAIN PROJECT OVERVIEW IN 1-2 PARAGRAPHS]

## Project Goals

*Clearly identify what you hope to accomplish with this project and what you see as a “win” so everyone is on the same page.*

The goals of this project include:

- i. [INSERT COMPANY GOAL #1]
- ii. [INSERT COMPANY GOAL #2]
- iii. [INSERT COMPANY GOAL #3]

To reach these goals, [YOUR COMPANY] is now accepting bids in response to this Request for Proposal.

## **Scope of Work**

*Include a description of the project and a detailed scope of work here. The description can be in paragraph form, a bulleted list, or a combination of both.*

[EXPLAIN SCOPE OF PROJECT IN A FEW SENTENCES AND/OR BULLET POINTS.]

## Target Deliverable Schedule

*Do you have a target deliverable schedule in mind?*

Final Project Due: [PROJECT DUE DATE]

The expected project completion date is [ADD DATE]. If this date needs to be adjusted, please include your readjusted proposed date, as well as your reasoning for shifting the schedule. All proposed date changes will be considered.



## **Existing Roadblocks or Technical Issues**

*Should you foresee any issues which may cause constraints in terms of time, resources or other factors that will affect both the proposal and consequently the project, please outline below.*

*Outline any technical issues or possible roadblocks, such as: Are you dealing with custom coding or an outdated platform? Does your team have limited resources?*

[OUTLINE YOUR ROADBLOCKS OR TECHNICAL CONSTRAINTS]

## **Budget Constraints**

[ENTER TARGET BUDGET AND/OR BUDGET CONSTRAINTS.]

## Submission Requirements

Bidders must adhere to the following guidelines to be considered:

- Proposals must be sent in by [INSERT DATE]. Bidders who are interested in submitting a proposal should inform [POC NAME + EMAIL] no later than [INSERT DEADLINE].
- Include up to 3 client references with your proposal. This can be direct contact information, in the form of client statements, or any associated or such approved materials.
- A proposed service schedule must also be included.

## Evaluation Metrics

*How will you ultimately determine which vendor is the best fit for this project? List which criteria you will consider when choosing the company, you will ultimately select.*

[YOUR COMPANY] will evaluate bidders and proposals based on the following criteria:

- Previous experience/past performance history.
- Samples and/or case studies from previous projects.
- Projected costs.
- Experience and technical expertise.
- Responsiveness and answers to questions in the next section

## Contact Information

For questions or concerns connected to this RFP, we can be reached at:

[NAME]

[EMAIL]

[PHONE]

### Company details

Registered office  
Address

Company number

### Local Office / responding

Address

## **Service requirements**

Responder summary

*Please provide a summary as to your response, any specific details you wish to cover.*

# Detailed Requirements

Compliance.		
	Priority	Vendor Response
Explain how your solution meets the GDPR regulations in relation to cookies, <i>i.e. you must tell people if you set cookies, and clearly explain what the cookies do and why. You must also get the user's consent which must be actively and clearly given.</i> Your answer should include details of how essential cookies are classified, when and how cookies are set, what positive action users must take to enable cookies and how control is provided to users for consent of any non-essential cookies.	1	
Provide details of any areas in which you believe your solution does not fully meet the GDPR regulations in relation to cookies.	1	
Describe in detail how your solution is deployed. Include details of any automation services available. Provide details of the effort and cost savings that automation is likely to deliver.	1	
Provide details of any local support required for service deployment. Describe any local customisation that is possible.	2	
Provide details of service deployment documentation available.	1	
What level of process documentation do you provide? Please provide details of documentation we can utilise to add to / enhance or include within our own standards.	2	



Describe in detail the process for auditing websites. Who controls the auditing process? How are audits initiated and by who?	2	
Describe any machine intelligence, automated assistance, technology that your solution provides to enable remediation prioritisation at a global and local level for a website estate.	2	
Describe in detail if/how your solution monitors a website estate and ensures ongoing compliance with the regulations. Include details of whether monitoring is real-time and details of alert & remediation capabilities.	1	
Describe risk assessment reporting that your solution provides and how this supports the remediation process.	1	
Describe whether your solution is centrally or locally controlled, e.g. can local sites define cookie classification?	2	
How can core system, configuration or such like: changes be centrally administrated, e.g. to reflect recategorized needs, and / or support changes in local or global regulation.	1	
Can reporting be automated to highlight any areas where intervention would be beneficial? e.g. monthly, quarterly summary of cookies by category, level of risk etc.	2	
Provide details of your operational consent service e.g. how is time, date and user IP recorded and at what frequency is ongoing consent obtained?	2	

Describe if / how your solution can be configured to 'blacklist' certain cookies and how it alerts the organisation at a corporate and local level to any cookies that are likely to cause serious compliance failure and risk exposure.	2	
Provide details of your system's archiving capabilities. Include details of how long audits are kept for. Provide details of capability to manage a retrospective complaint, e.g. prior to remediation of a problem.	1	
Does your solution provide certification for each website? How long are audit certificates stored, recorded and recalled?	2	
Consent requires visitors to be fully informed. Describe if/how your service caters for the differing levels of knowledge and capability of your website visitors.	2	
Beyond compliance, describe in detail how your solution helps demonstrate a consistent, managed and scalable process? Can you demonstrate a proven methodology to ensure ongoing management of consent?	2	
Describe if/how your solution can be configured to meet our specific industry needs in relation to risk and visitor data.	2	
How does your solution prevent the misclassification of cookies? Does your solution have a single data repository of cookies by type and usage? Is this a function controlled centrally or can it be locally managed?	1	

<p>How is the delivery of the CMP panel recorded by site? Can details of service presence be proved retrospectively? How long are records kept for this?</p>	<p>1</p>	
<p>Does your solution provide 'live preview' capabilities prior to launch? Can the service be demonstrated as 'in place' prior to website release? e.g. when local compliance sign-off is required prior to release.</p>	<p>2</p>	

**Digital.**

Describe your solution configuration options: Is it possible to have different configurations for different brands, countries or individual websites? Is it also possible to ensure that a single configuration is deployed across the organisation, ensuring consistency of UX for all visitors?	1	
Is on-demand auditing available in addition to automated auditing of websites? Please provide details on this is initiated, what level of controls are in place – who can access how and when?	1	
Describe in detail the technical audit reporting that is generated to support remediations teams.	2	
Does your solution support multiple devices, including mobile? Are visitors able to make an informed choice regardless of device? Please provide examples showing differing device types.	1	
What level of training and/or onboarding support is required to manage service deployment? What documentation is provided for localised deployment? To what extent is automation utilised to support deployment? Please provide details.	2	
Post initial remediation, how do you monitor and provide alerts for websites that have subsequently fallen out of compliance following the introduction of new content / cookies?	1	
Describe the range of reporting options offered as standard, e.g. for keeping accurate records of the remediation process, status etc. Please	2	

also provide details of any secure data exporting options. Describe any automated report distribution options available.		
Can specific cookies, that are considered to be a particular threat, be appropriately listed? e.g. white, grey and blacklisted. Describe how we would be alerted to these cookies being set.	2	
How do you ensure that implementing your service doesn't fall foul of other regulation? Does your solution adhere to WCAG standard and to what level?	1	
Describe in detail the infrastructure that you have in place to support a high level of performance and user experience.	1	
How many languages does your service support? Does it support {insert languages that are 'must haves' here}	1	
Describe in detail what security your solution provides, directly in relation to any anti-sabotage capabilities.	1	
Provide detail of the level of security offered by your solution in terms of anti-hacking.	1	
Are visitors able to review cookie details online and offline? Can different views be provided for different visitors? What are the delivery mechanisms available for this service?	2	
Are stand-alone pages, not linked to a parent domain, included in audits? Please provide details.	2	

Does your solution support variance reporting? i.e. any change in content by website or across a country, division, globally etc. Please provide details.	2	
Can your solution be configured, down to the individual panel level, e.g. to support local regulations, whilst also delivering a consistent user experience to website visitors globally? Please provide details.	2	
Describe the level of support that will be required to manage the service and/or to what extent it is self-serve? Is access managed through an online portal? How is access managed/controlled? Please provide details.	1	
Will dedicated resources be required to manage or support the service once deployed? How much effort is typically involved?	1	
How does your solution cater for archived and decommissioned websites? What records are kept for these sites and for how long?	2	

**Marketing.**

Does your solution support a single panel information centre, i.e. all the information visitors require in the panel rather than links (that have to be managed) to differing areas of the websites, or in some cases external websites? Please explain how UX is managed.	1	
How is consent managed across an enterprise website estate? What options are there in relation to multi-site journeys by visitors and panel suppression – recognition of 2 <sup>nd</sup> party cookies?	1	
How easy is it, and what are the options for users to opt-in or out, per cookie, per category? Please provide details.	2	
Can further detail and education about cookies be provided to enable visitors to make an informed choice in their own time?	3	
Does your service support independent verification and certification for each website? Please provide details.	2	
Does your solution provide any type of consent reward option? e.g. for loyal visitors to your site. Please provide details.	2	
Can your solution provide analytics data without infringing privacy regulations? e.g. marketing data aggregation. Please provide details.	1	

Does your solution provide effective landing page management, e.g. for stand-alone pages not directly linked to a domain? Is consent for any data collection managed effectively? How this is supported?	2	
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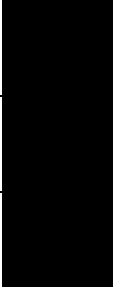
**Management.**

Is it possible to have a single configuration, i.e. one setup for any all of websites?	1	
How does your system keep track of and maintain up-date reporting of [organisation name] compliance progression? Please provide examples.	2	
Provide details of any deployment guide and remediation management documentation.	2	
How does your solution rank websites in accordance with risk to enable remediation prioritization?	1	
What management reports are available as standard? How is reporting managed and how are reports distributed? Please provide examples.	2	
Explain if/how your solution profiles risk for each website. Is your system able to map out likely remediation timescale and able to assign actions? If so, please provide details.	2	

**Information Technology and DATA Centre.**

Describe the deployment and user management process. Describe website profiles, users accounts and service logins that are required.	2	
What built in fail over protection does your solution have? Please provide details of how this has been proven/tested.	1	
Provide full details of the security features of your system including anti-hacking prevention and impact mitigation.	1	
Describe how high service performance and availability is assured.	1	
How are archive and backups of audit data stored? Include details for live and decommissioned websites.	1	
What measures do you put in place, if any, to ensure that you, as a service provider, are meeting SLAs?	1	
What specific measure do you have in place if panel hacking is detected? How do you ensure that there is no impact on the host websites' availability or performance?	1	
Provide details of any other service continuity features that you provide.	3	
Please provide any supplementary information that you feel is relevant, e.g. in relation to your experience of enterprise scale, high availability service provision, website auditing, certification & delivery, backup etc.	3	

**Finance**

<p>Describe how/why your solution is cost effective to purchase, deploy and maintain. Outline the project and technical resources required to deploy and manage the service and the estimated associated costs.</p>	<p>1</p>	
<p>Do you provide any pay as you use 'CMP as a Service' capability? If so please detail.</p>	<p>1</p>	
<p>Outline the investment required in staff training and support for your solution.</p>	<p>2</p>	
<p>Provide full details of your pricing model.</p>	<p>3</p>	
<p>Provide a copy of your privacy policy.</p>		
<p>Please provide a copy of your SLA.</p>		
<p>Please provide a copy of your terms and conditions.</p>		

## Responder Client Examples

The key to our acquisition of a Consent Management Platform (CMP) is ensuring the service selected offers compliance with regulation. Respecting online privacy is a cornerstone of our brand value, earning and not 'taking' consent is very important to us.

Other than <sup>1</sup>essential cookies – your solution should ensure no cookies are set ahead of consent being freely given by the website visitor. Tag management services used for cookies inclusion, website visitors should not be considered as *essential*.

To enable us to easily evaluate this, please provide validation of your example client websites, and the cookies that are set, in the table below (a free service to provide this information can be found at [www.rethinkingprivacy.com](http://www.rethinkingprivacy.com)).

Website address 'URL	Assessed risk (Low / Medium / High)	Notes

<sup>1</sup>Essential cookies: these are cookies that are either: used solely to carry out or facilitate the transmission of communications over a network; or strictly necessary to provide an online service (e.g. our website or a service on our website) which you have requested.

Also for example, in the UK see <https://ico.org.uk/for-organisations/guide-to-pecr/cookies-and-similar-technologies/>