Request for Proposal (RFP) Checklist

Basic Information

- ☐ Background of your organization
- ☐ Business objectives (current and future)
- ☐ Project scope and goals
- ☐ Timeline of project
- ☐ Overview of functional areas
- ☐ Vendor questions
- ☐ Specific questions and needs

RFP Directions

- ☐ Procurement schedule
- ☐ Duration of the proposal
- ☐ Vendor evaluation criteria

Ask the Vendor

- ☐ How long have you been in business?
- ☐ How many staff members do you have?
- ☐ What is the product maturity?
- ☐ How many clients do you have?
- ☐ How many clients on this particular software?
- ☐ Do you have a users' group?
- ☐ How do you manage documentation/training?
- ☐ Describe the AMS platform (core database, application layer, business layer).
- ☐ Describe the environment (hosting, security, maintenance, data access for clients).
- ☐ Describe the process to support changes in business processes.

RFP Tips

- ☐ Document the full business process.
  - o Focus on what and why behind each business process.
- ☐ Include narrative and visual elements in the RFP.
- ☐ Add an appendix of requirements in a checklist format.
  - o Number each requirement in the checklist.
  - o Provide open comments for each question.
- ☐ Use the RFP response as part of the contract.

- ☐ Identify must-haves vs. nice-to-haves.
- ☐ Ask for price.
- ☐ Make it scorable.