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.

* 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.

* Number each requirement in the checklist.
* 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.