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.