

Request for Proposal (RFP) Checklist

Basic Information

- ☐ Introduce the project
- ☐ Background of your organization
- ☐ Business objectives (current and future)
- ☐ Project scope and goals
- ☐ Timeline of project
- ☐ Requirements of functional areas **where the AMS is a source of revenue or benefits**
- ☐ Ecosystem (current and future)
- ☐ Appendix with a summary of other functions (e.g., committees, awards) for reference
- ☐ Appendix with samples of complex reports

RFP Directions

- ☐ Instructions to Vendors
- ☐ 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?
- ☐ 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.
- ☐ Use the RFP response as part of the contract.
- ☐ Identify must-haves vs. nice-to-haves.
- ☐ Make it scorable.