



Request for Proposal (RFP) Checklist

Basic Information

- Background of your organization
- Business objectives
- 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).

RFP Tips

- Number your RFP items.
- 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.