Request for Proposal (RFP) Checklist

Use this Request for Proposal (RFP) Checklist in conjunction with the mandatory use [RFP template](https://www.oregon.gov/das/Procurement/Pages/ELTdocs.aspx) developed by DAS Procurement Services and the Attorney General’s Office. The standardized template aligns with state statute, DOJ Model rules and DAS rules.

Refer to the [Competitive Sealed Proposals (RFP)](https://www.oregon.gov/das/OPM/Pages/proposal.aspx) section of the Oregon Procurement Manual for more information on developing an RFP.

# Agency Responsibilities

The following checklist items are the minimum requirements of an agency procurement professional when developing an RFP. If an agency is delegated authority to conduct the procurement, the agency procurement professional should verify all items shown in both the Agency Responsibilities and DAS Procurement Services Responsibilities sections of this checklist.

Verify general information and provisions

* High-level description of the procurement that generally outlines the scope and supplies project dates, if known, in a way that potential proposers can determine if their capabilities match the procurement opportunity.
* Award information that specifies single or multiple awards, possible length of award or contract.
* Schedule dates that match the latest timeline.

Verify authority, overview and scope

* Procurement authority granted through statute, rule, or other authority, or DAS delegated authority is documented.
* Terms and acronyms are defined.
* An overview of the purpose of the solicitation, including background information on the agency and the project that describes:
* Agency program and its purpose.
* Procurement objectives and context regarding how the need has been met historically.
* Factors that inform the procurement, such as agency policy or legislative direction (as applicable).
* Benchmarks or past performance.
* Driving factors, including past and projected purchases.
* Contract or price agreement beneficiaries.
* Contract or price agreement conditions.
* Scope of work describes the products or services needed and establishes the parameters of what can be amended into the contract later.

Verify proposer minimum qualification requirements, which may include:

* Dun & Bradstreet (D&B) ratings.
* Licensing requirements.
* Certification requirements.
* Key Personnel Requirements.

Develop an Evaluation Strategy. Refer to the [Develop Evaluation Strategy](https://www.oregon.gov/das/OPM/Pages/evaluation.aspx) section of the Oregon Procurement Manual for more information on documenting a strategy to evaluate and select a product or service in an impartial, fair, efficient, transparent and non-discriminatory manner.

# DAS Procurement Services Responsibilities

The assigned DAS Procurement Services staff will verify the following checklist items in coordination with the agency. If an agency is delegated authority to conduct the procurement, the agency procurement professional should verify this section of checklist items.

Verify general information and provisions

* RFP single point of contact (SPC), name, title, and mailing and email address.

Verify the process and details of the solicitation are described, including:

* Provision for pre-proposal conference. If a pre-proposal conference is planned, specify:
* Mandatory or optional attendance.
* Time, date and location.
* Option to attend through remote access via teleconferencing or web conferencing.
* Provision that statements made by the agency or DAS representatives at the conference are not binding unless confirmed by written addendum.
* Questions/Clarifications process.
* Protests process.
* Modifications or withdrawal.
* Time and date of proposal closing.
* Time, date and place of public opening of proposals.
* Proposal rejections.

Verify minimum submission requirements, including requirements for:

* General Proposal Requirements.
* Required number of originals.
* Required number of copies.
* Required number of electronic copies.
* Form and format of submissions (i.e., three ring binder, spiral bound, USB, etc.).
* Packaging requirements.
* Delivery requirements.
* Administrative submission requirements.
* Mandatory requirements.
* Required attachments, exhibits and/or forms.
* Minimum required proposer submissions.
* Technical Proposal submission requirements.
* Page limits, if any.
* Form and format of response.
* References process
* Cost Proposal submission requirements.
* Form and format of response.

Verify the evaluation criteria is clearly explained

* + - * + Responsiveness criteria.
        + Responsible criteria.
        + Evaluation criteria.
        + Preferences detailed.
        + Next Step determinations.

Verify solicitation includes provisions for award and negotiation

* Intent to Award Notification process.
* Protest process.
* Negotiation processes.
* Consideration of preferences (if applicable).
* Contract Execution process and requirements.

Verify inclusion of appropriate document language as required by Oregon statute and rules

* Proposer certification of compliance with Oregon tax laws, if applicable (refer to ORS 305.385).
* Proposer certification of non-discrimination in obtaining required subcontractors, if applicable.
* Provisions for proposal security.
* Unless Architectural and Engineering services, requirement that contractors perform work according to the highest industry standards for their profession.
* All contract terms and conditions applicable to the procurement, clearly specifying consequences for a contractor’s failure to perform the RFP’s scope of work or a contractor’s failure to meet established performance standards.
* Any negotiable terms or conditions, which the proposer may offer in response to the RFP.