

# RFP Toolkit – Checklist for Narrowing Down Vendors

**Purpose:** The following checklist contains preliminary steps to be followed when considering vendors for a selection process (RFP).

**When to ask/obtain:** The following questions should be asked of a vendor PRIOR to any RFP being submitted or any invitation to participate in a selection. The reason behind this is that the below criteria may be deal breakers and may preclude a vendor from selection. In this case, there would be no reason for a vendor to submit an RFP.

**How to ask:** These questions should be emailed to the vendor prior to the preliminary letter being sent to the vendor that invites them to participate in the RFP selection. Each of the below items should be asked of the vendors and checked off indicating if the vendor has either met or not met the selected criteria. If the vendor does not meet the criteria, please discuss with your selection team the impact of that information. In some cases, such as not meeting security guidelines, a vendor may need to be eliminated right off the bat.

Suggested Vendor Preliminary Question	Can Vendor Meet?
1) Can the vendor meet your projects selected timelines for RFP submission return and demos? (i.e can they get the filled-out RFP back to you by date X or have demos by Y?)	
2) Can the vendor meet your projects selected implementation timelines? (i.e., if you need your project to be live in 1 year, can the vendor support a one-year implementation?)	
3) If PII will be stored/accessed as part of this project, has the vendor completed and can they certify that appropriate security certification is in place. Documentation will be required to be provided to security.	
4) Is the vendor willing to submit/agree to the terms and language contained in BAA, MSA, and/or SOW? (You may want to send them samples of this to review)	
5) Is the vendor willing to stand behind and honor any quoted prices submitted for the term of at least one year?	