RFP Checklist

**Revised January 2023**

**eMARS Document:**

**Header:**

* Correct Procurement type
* Correct Default Form
* Correct Solicitation Category
* Correct Bid Receiving Location

**Terms and Conditions: Two Lines**

* Sequence #1 Free Form (RFP for PSC Template)
* Sequence #2 Current PSC Standard Terms and Conditions

**Commodity Line:**

* Applicable commodity code selected (Do not use miscellaneous professional services)
* Extended Description -- Brief description of services to be provided
* Line Type = Service
* Contract Amount – Leave Blank
* Contract service dates – Should match dates in Section 10.30 of the terms and conditions.
* Shipping & Billing

**Evaluation Criteria Line:**

* This section is not required to be completed but if used, items listed should match evaluation criteria in Section 3.00 of the terms and conditions.

**Free Form Vendor:**

* Name and email addresses of suggested vendors who may be interested in submitting a proposal.

**Commodity E-mail Push:**

* List all applicable commodity codes specific to the procurement to allow for maximum competition.

**Publishing Tab:**

* Let Date must match the date in the Schedule of RFP Activities. RFPs must be submitted to OPS for approval a minimum of seven business days before the Let Date.
* Close Date must match the date in Schedule of RFP Activities and Section 8.00 of the terms and conditions. Must be a minimum of seven (7) days after the last activity (Let Date or Addendum.

**Assembled Document:**

Before submitting for approval, review document carefully:

* Evaluation Criteria must clearly state what the vendor needs to provide with their proposal to receive points.
* Make sure all dates match throughout document.
* Choose applicable renewal language.
* Do NOT duplicate the Finance Terms and Conditions within the Agency Terms and Conditions

Please use the RFP for PSC template when creating the agency terms and conditions. Follow instructions only making changes where allowed.

RFPs must be submitted to OPS for review a minimum of seven business days before the Let Date.

SPR1 is not required to issue RFPs for professional services.

RQS is not required to issue RFPs for professional services.

RFPs will not be approved without oral presentation language in Section 3.00

Requirements that include the words “Shall”, “Will”, “Must” indicate a mandatory requirement. Mandatory requirements should be a pass/fail or yes/no and if the vendor does not meet the requirement the proposal is deemed nonresponsive. Points are not assigned to mandatory requirements.

If there is an information technology component (cloud, software, hardware, services) to this RFP, agency must obtain COT approval through the SPR1 process or an email from COT stating their approval is not required prior to RFP posting. Approved SPR1 or email from COT must be attached to the PON2 Award, not the RFP.