

## Request for Proposal (RFP) Check List - RFP #

	Description	Handled By	Estimated Business Days	Targeted Completion Date	Completed
<b>1. Identify Need</b>					
	- Is this a New or Existing Procurement? ▪ If existing what is the current contract number?	Agency	0 days		
	- Is this a software purchase?	Agency/CAPS	0 - 3 days	1/4/1900	Yes <input type="checkbox"/> No <input type="checkbox"/>
	- If it's not a software purchase, is there an existing contract that can be used? NO				Yes <input type="checkbox"/> No <input type="checkbox"/>
	- Decide if the procurement is a Commodity or a Service <b>AND</b> create a timeline based on the target contract start date.	Agency/CAPS	0 days	1/4/1900	Service
<b>2. Develop RFP</b>					
	<b>Procurement Plan: Services Only, <a href="#">PRO-A-4</a></b>				Yes <input type="checkbox"/> No <input type="checkbox"/>
	- Complete Procurement Plan and send, via email, to Procurement Specialist	Agency	0 - 4 days	1/10/1900	<input type="checkbox"/>
	- Sends completed Procurement Plan to Bureau of Procurement Office	CAPS	0 days	1/10/1900	<input type="checkbox"/>
	- Receives approved or denied Procurement Plan		7 - 10 days	1/24/1900	<input type="checkbox"/>
	<b>Cost Benefit Analysis (CBA): Services Only, <a href="#">PRO-I-15</a></b>				Yes <input type="checkbox"/> No <input type="checkbox"/>
	- Tracking Number	Agency	0 days	1/24/1900	
	- Complete CBA and send, via email, to Procurement Specialist	Agency	0 - 5 days	1/31/1900	<input type="checkbox"/>
	- Sends completed CBA to Bureau of Procurement Office	CAPS	0 days	1/31/1900	<input type="checkbox"/>
	<b>Request for Proposal Document and Cost Sheet Preparation</b>				
	- Purpose and Scope	Agency	10 - 15 days	2/21/1900	<input type="checkbox"/>
	- General Proposal Requirements (Mandatory Requirements)				<input type="checkbox"/>
	- Technical Requirements, Performance and Support Requirements, etc.				<input type="checkbox"/>
	- Any Special Terms and Conditions				<input type="checkbox"/>
	- Cost Sheet				<input type="checkbox"/>
	- Scoring Criteria/Benchmarks				<input type="checkbox"/>
	- Compile list of Potential Proposers	Agency/CAPS	0 - 3 days	2/24/1900	<input type="checkbox"/>
	- Proposer Outreach	CAPS	0 - 5 days	3/2/1900	<input type="checkbox"/>
	- <a href="#">Compile list of Evaluators, PRO-C-29</a>	Agency	0 - 3 days	2/24/1900	<input type="checkbox"/>
	- RFP Document, Cost Sheet and Scoring Criteria entered into Strategic Sourcing	CAPS	10-12 days	3/13/1900	<input type="checkbox"/>
	- Collaboration/Review of Procurement Specialist questions and concerns	Agency/CAPS	10 - 15 days	3/29/1900	<input type="checkbox"/>
	- RFP Document, Cost Sheet, and Benchmarks Finalized		0 days	3/29/1900	<input type="checkbox"/>
	- Peer Review	CAPS	3 - 5 days	4/5/1900	<input type="checkbox"/>
	- RFP Section Chief Review		10 days	4/19/1900	<input type="checkbox"/>
	▪ Additional Questions and Concerns Reviewed (as needed)		3 - 5 days	4/26/1900	<input type="checkbox"/>
	- Agency approval to post to eSupplier	Agency	0 - 5 days	5/3/1900	<input type="checkbox"/>
	- RFP Posting to eSupplier (total time posted 4 - 6 weeks)	CAPS	0 days	5/3/1900	<input type="checkbox"/>
<b>3. Issue &amp; Manage RFP</b>					
	Questions Due Date		5 - 10 days	5/17/1900	
	- Answer Questions received	Agency	7 days	5/28/1900	<input type="checkbox"/>

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	- Creation of Amendments	CAPS	1 day	5/29/1900	<input type="checkbox"/>
	- Post to eSupplier/Bidder Communication		0 days	5/29/1900	<input type="checkbox"/>
	▪ If multiple rounds of questions, repeat a) - d)		7 days	6/7/1900	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>4.</b>	<b>Review, Evaluate &amp; Award</b>				
	<b>Review for completeness</b>				
	<b>Proposal Due Date</b>			6/21/1900	
	- Do Proposers meet all Mandatory Requirements?	CAPS	1 day	6/22/1900	<input type="checkbox"/>
	- Do Proposers provide all required documentation (DOA forms, supporting documents, etc.)?				<input type="checkbox"/>
	- Do Proposers provide a completed Cost Sheet?				<input type="checkbox"/>
	- Do Proposers take any exceptions to the Special Terms and Conditions?				<input type="checkbox"/>
	- Do Proposers reference cost or dollar amounts in the Proposal response?				<input type="checkbox"/>
	- Clarifications				<input type="checkbox"/>
	<b>Evaluation Committee</b>				
	- Kick Off Meeting, <a href="#">RFP Evaluation Checklist</a>	CAPS	0 - 5 days	7/6/1900	<input type="checkbox"/>
	- Evaluation Meeting		5 - 10 days	7/20/1900	<input type="checkbox"/>
	- Demonstrations/Vendor Interviews/On-site visits	Agency/CAPS	5 - 10 days	8/3/1900	Yes <input type="checkbox"/> No <input type="checkbox"/>
	▪ If yes, develop demonstration script				
	- Reference Checks	CAPS	0 - 5 days	8/10/1900	<input type="checkbox"/>
	- Evaluation Follow-up Meeting		0 - 5 days	8/17/1900	<input type="checkbox"/>
	<b>Cost Evaluation</b>				
	- Initial Cost Abstract created	CAPS	1 - 2 days	8/21/1900	<input type="checkbox"/>
	- Possible Best and Final Offer (BAFO) Request, <a href="#">PRO-C-39</a>		5 - 15 days	9/11/1900	Yes <input type="checkbox"/> No <input type="checkbox"/>
	▪ If no, document rationale				
	- <a href="#">Minority Business Enterprise Policy, PRO-D-1</a>		0 days	9/11/1900	Yes <input type="checkbox"/> No <input type="checkbox"/>
	- <a href="#">Disabled Veteran-Owned Business Policy, PRO-D-35</a>		0 days	9/11/1900	Yes <input type="checkbox"/> No <input type="checkbox"/>
	<b>Eligible/Ineligibility Status Checks</b>				
	- Certification for Collection of Sales and Use Tax Ineligible Directory	CAPS	1 days	9/12/1900	<input type="checkbox"/>
	- WI Office of Contract Compliance Ineligible Vendor Directory		0 days	9/12/1900	<input type="checkbox"/>
	- Federal Debarment List—if using Federal Funds		0 days	9/12/1900	<input type="checkbox"/>
	<b>Evaluation Committee Report, <a href="#">PRO-C-40</a></b>	<b>CAPS</b>	<b>5 days</b>	<b>9/19/1900</b>	<input type="checkbox"/>
	<b>Administration Review (only occurs on Thursdays)</b>	<b>CAPS</b>	<b>5 - 10 days</b>	<b>10/3/1900</b>	<input type="checkbox"/>
	- Agency notified of Admin Review approval and Notice of Intent to award	CAPS	0 days	10/3/1900	<input type="checkbox"/>
	▪ Award, Non-Award, and Disqualification Letters sent to vendor(s)			10/3/1900	<input type="checkbox"/>
	- Document information identified as proprietary or confidential		0 days	10/3/1900	<input type="checkbox"/>
	- Protest/Appeal Period (services only), <a href="#">PRO-I-13</a>	Agency	10 days	10/17/1900	<input type="checkbox"/>
	Protest Due Date			10/18/1900	

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<b>5.</b>	<b>Post-Award Activites</b>				
	- Contract Number/Transactional Contract	CAPS	1 day	10/18/1900	<input type="checkbox"/>
	- Ensure offical procurement file is complete		1 day	10/19/1900	<input type="checkbox"/>
	- Post award information in STAR		0 days	10/19/1900	<input type="checkbox"/>
	- Contract negotiation(if needed)	Agency	5-15 days	10/26/1900	<input type="checkbox"/>
	- Contract signatures	Agency	15 days	11/16/1900	<input type="checkbox"/>



Date Completed

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