

RFP COMPLIANCE CHECKLIST | WORK SAMPLE

Illustrative solicitation: State IT Modernization – Eligibility & Case Management System (sample RFP; requirement references are fictional)

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Proposal due: [Date / Time ET] – confirm via latest amendment	Submission method: [Portal / sealed hard copy] • copies: [#]	Q&A deadline: [Date] • Amendments acknowledged: [#]	Page limit / format: [#] pages, 12 pt, 1" margins, PDF searchable
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#	Requirement (Shall / Must)	RFP Ref.	Response Location	Evidence / Attachment	Owner	Status
SECTION A – ADMINISTRATIVE & MANDATORY (pass/fail)						
A1	Signed transmittal letter by authorized officer	\$2.1	Vol. I, Tab 1	Signed cover letter	Contracts	☐
A2	Acknowledge all addenda/amendments	\$2.3	Vol. I, Tab 1	Signed acknowledgment forms	Proposal Mgr	☐
A3	Vendor responsibility questionnaire & certifications	\$2.4, Att. B	Vol. I, Tab 2	Completed forms, notarized	Contracts	☐
A4	Proof of insurance meeting stated minimums	\$2.6	Vol. I, Tab 3	Certificate of insurance	Finance	☐
A5	MWBE / SDVOB utilization plan and good-faith efforts	\$2.8, Att. D	Vol. I, Tab 4	Utilization plan, subcontractor LOIs	Capture Lead	☐
SECTION B – TECHNICAL APPROACH (scored)						
B1	Describe solution architecture and integration with existing state systems	\$4.1	Vol. II, §1	Architecture diagram	Solution Arch.	☐
B2	Meet accessibility (WCAG 2.1 AA / Section 508) for all user interfaces	\$4.3	Vol. II, §2	VPAT / accessibility test plan	UX Lead	☐
B3	Data security & privacy controls (e.g., NIST 800-53 moderate baseline)	\$4.5	Vol. II, §3	Security plan, SOC 2 report	Security Lead	☐
B4	Requirements traceability from RFP to design, build, and test	\$4.7	Vol. II, §4	Requirements Traceability Matrix	Proposal Mgr	☐
SECTION C – MANAGEMENT & STAFFING (scored)						
C1	Project management plan: schedule, governance, risk, change control	\$5.1	Vol. II, §5	Integrated master schedule (MS Project)	PM Lead	☐
C2	Key personnel resumes meeting minimum qualifications	\$5.3	Vol. II, App. A	Resumes, signed commitment letters	HR / Capture	☐
C3	Organizational change management and training approach	\$5.5	Vol. II, §6	Training plan, adoption metrics	OCM Lead	☐
C4	Three references for similar public-sector engagements	\$5.7	Vol. II, App. B	Reference forms, contacts verified	Capture Lead	☐
SECTION D – COST (separately sealed)						
D1	Cost proposal on state-provided pricing form only	\$6.1, Att. F	Vol. III	Completed pricing workbook	Finance	☐
D2	No cost data in technical volume	\$6.2	Vol. II (review)	Red-team scrub sign-off	Proposal Mgr	☐

Final QA gate before submission: ☐ Every "shall/must" mapped to a response location ☐ Section L instructions / M evaluation criteria mirrored in headings ☐ Executive summary states win themes tied to scored criteria ☐ Page limits, fonts, file names verified ☐ Forms signed and dated ☐ Pink / Red / Gold reviews complete

Status key: ☐ Open → D = Drafted → V = Verified compliant (update column at each color review)