



PROPOSAL PREPARATION CHECKLIST

1. RFP/DOCUMENTS

- Request or download a copy of the bid documents – IFB or RFP.
- Assemble your internal review team to review the request/invitation.
- Review the entire package for missing pages or sections.
- Determine if additional information is required and prepare questions for submission to Contracting Officer (CO).
- Set up a tracking date to receive the CO's responses
- If satisfied with the responses, have team review and begin preparing a plan for responding to the solicitation.

2. TEAMING PARTNERS

- Identify potential teaming partners.
- Determine type of teaming arrangement.
- Prepare teaming agreements and negotiate.
- Receive signed agreements from partners. Do you have a subcontracting plan requirement?
- Have you clearly defined each Team-member's level of participation on the project?
- Have you determined the level of effort needed to prepare the bid in terms of staff?
- ...In terms of consultants?

3. CAPTURE STRATEGY

- Hold strategy meetings.
- Identify each team member's strengths and weaknesses.

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- Identify competition and their strengths and weakness.
- Identify ways to differentiate your team from your competitors.
- Develop strategic themes.
- Develop a strategy for each component and an overall capture strategy.

4. TECHNICAL AND PRICING PROPOSAL

- Prepare an initial outline; you will need to revise it as you go along.
- Each technical section will require expertise, identify & select writers for each section.
- Since you are probably limited on page numbers, determine page numbers for each section.
- The document format is usually specified in the request for proposal/bid (font, major/minor headings, etc.).
- The RFP/IFB contains specific requirements – e.g. Sections L&M for Air Force proposals, Representations and Certifications, etc. that are complete deal-enders if not completed. Prepare a checklist of these. Scrub the contract and answer each and every requirement in the bid before responding to it.
- The Government, indeed each Agency within the Government tends to have its own language and abbreviations so prepare and distribute a list of nomenclature, abbreviations, and acronyms appropriate to the Agency to which you are responding.
- If you have access to experienced proposal writers from previous submittals related to this or a similar proposal, identify these people to participate.
- Develop a schedule with due dates for draft sections.
- Develop your “red team” review, feedback and editing process for different intervals of the process.
- Make sure everyone uses compatible software packages and versions.
- Make sure everyone’s email can send and receive from team member’s emails.

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5. EMPLOYEES AND TALENT

- Determine requirements for long-term personnel for contract if awarded.
- Have a way to track submittals by candidates for the positions as you solicit individuals for the positions.
- Prepare contingent employment offer letters for signature by candidates.
- Recruit long-term staff and consultants.
- Get draft Curriculum Vitae and resumes for submission in proposal.
- Organize your talent by CV/resume.
- Have your subject matter proposal writers review the candidate CVs and make recommendations.
- Qualify the best candidates and alternates.
- Contact the candidates' and confirm their interest/availability.
- Determine if additional qualifying information is needed in any of the CVs and obtain from candidates, if necessary.
- Obtain contingent employment offer letters from candidates.
- Prepare skills matrices.

6. PAST PERFORMANCE REFERENCES

- Use RFP format if required.
- Update and/or prepare past performance information as needed.
- Review for accuracy and completeness.

7. PACKAGING

- Review the RFP for Cover page requirements (RFP #, date, submitted to/by, etc.).
- Prepare cover.

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- Review the RFP to determine any requirements for packaging – number of copies, binder style, format, etc.

8. FINAL TOUCHES

- Spell check all sections. Review your pricing and technical sections one more time. Does the technical approach appear sound? Are the prices reasonable? Have an independent review of both to see if anything is missing. You would be amazed at what gets left out!
- Gather appendix materials.
- Prepare Table of Contents.
- Prepare Transmittal Letter.
- Prepare Inside Cover Sheet for Technical/Pricing Proposal.
- Prepare Section Tabs/Dividers for Technical/Pricing Proposal

9. PRODUCTION & QUALITY CONTROL

- Determine who is responsible for reproduction.
- Check each page to make sure it copied cleanly.
- Check each copy to ensure every page is there.

10. HOW IS THE PROPOSAL BEING DELIVERED

- Prepare in accordance with instructions, if any
- Hand deliver, if possible. Know what time it is due – remember late is late and probably will result in a rejected bid...
- Make sure you have an outside address label.
- Mark "original" on 1 copy of the proposal.
- Prepare receipt if delivering by hand.
- If mailing:

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- ❑ Check courier service schedules to ensure it will get there a day early
- ❑ Regardless of delivery method, make sure someone knows they are responsible for getting it there!

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