



# **Sample Proposal Check List**

Systemization and processes can be a tremendous time saver when writing proposals. It is recommended that you use this as a guide to develop your own checklist to ensure that you submit a complete proposal that will have a large impact.

## RFP Documents

- Obtain complete copy of RFP
- Assemble team to evaluate the opportunity
- Distribute RFP to appropriate personnel
- Review and clarify RFP requirements
- Prepare initial questions that need to be addressed to enable proposal preparation
- Review RFP procedure rules and contacts
- Determine resources required to submit proposal
- Allocate resources and assign tasks for proposal submission
- Check dates for submission
- Check delivery issues
- Follow directions in the RFP carefully
- Bid-No Bid Decision
- Write letter of intent or No-Bid letter
- Fill out any forms that may be required before submission (I.e. Confirmation of receipt and intent to bid form)

## Proposal Strategy

- Hold strategy meetings
- Identify the strengths and weaknesses of your organization.
- Identify competition and their strengths and weakness.
- Identify ways to differentiate your organization from competition.
- Develop strategic themes.
- Develop strategy for each component and overall.
- Determine main strategic theme

## Strategic Alliances / Partnerships

- Identify any additional requirements that your organization may need
- Identify potential alliances or partnerships
- Determine type of alliance / partnership arrangement
- Determine level of involvement of each party
- Prepare and execute agreements



- Determine type of proposal that is required (simple quote, more complex document)
- Prepare draft outline
- Ensure draft is consistent with the RFP
- Collect relevant completed sections or templates from past proposals
- Identify & select writers for each section
- Determine document format (font, major/minor headings, etc.)
- Provide writers with written formatting guidelines/instructions
- Provide writers with style sheet / templates
- Prepare/distribute list of nomenclature, abbreviations, and acronyms
- Identify and provide writers with relevant sections from past proposals or templates
- Prepare schedule/identify due dates for draft sections
- Determine review, feedback and editing process for written sections
- Write Executive Summary and Prepare Table Of Contents

### Personnel

- Determine key personnel involved in service delivery after winning the contract
- Accumulate biographies and resumes that are needed in the proposal
- Write short blurb about key roles in the delivery of service
- Prepare a contingency plan to replace key personnel to fill roles

### Past Performance and Testimonials

- Accumulate testimonials and get releases from providers
- Prepare past performance information
- Review information for completeness and accuracy

### Sustainability

- Determine sustainability issues
- Determine ethical issues
- Determine supply chain sustainability and ethical compliance
- Write section addressing the issues



- Select cover design (map, picture, graphic, etc.)
- Identify info for cover (RFP #, date, submitted to/by, etc.)
- Prepare cover (in PhotoShop as GIF image)
- Determine packaging requirements
- Purchase any material that will be required e.g. binders, notebooks, CD covers
- Ensure sufficient quantities of all packaging items are available
- Keep critical key items in reserve e.g. high-quality paper, color toner etc

### Production

- Determine who will oversee production
- Print copies. Keep one hardcopy as reference
- Insert special pages, charts, etc., if required
- Insert appendix materials
- Check pages in each copy for legibility
- Check graphics for legibility
- Check hyperlinks are correct e.g. on CD
- Check for page omissions
- Check for page duplications e.g. same page/section printed twice
- Ensure all amendments and addendums are included or addressed

### Finishing Touches

- Spell check all section thoroughly
- Assign editor to do a final proof reading for:
  - Compliance to the requirements stated in the RFP
  - Spelling, grammar and typos
  - Consistent style, format and message
  - No missing information
- Gather and insert all supporting documents and appendix material

### Proposal Delivery Logistics

- Check instructions for delivery
- Ensure correct addresses for mail, courier, fax submission, email submission
- Ensure file format of document is correct for electronic submission
- Ensure delivery will be on time, check courier schedules
- Do not submit too early (possible amendments can be published)
- Be sure the proposal is properly packaged and addressed with labels