

## PROPOSAL CHECKLIST

**RFP TITLE:**

**RFP #:**

<b>Task</b>	<b>Assigned to</b>	<b>Due Date</b>	<b>Done</b>	<b>N/A</b>	<b>Notes</b>
<i>Initial Set Up:</i>					
Make decision to bid					
Form proposal team; identify function leads and name below:					
Process Manager					
Administrative support					
Technical					
Business Proposal					
Review					
Identify RFP-specific requirements					
Submit letter of intent-to-bid with required attachments (if applicable)					
<i>Planning and Proposal Design:</i>					
Design technical approach					
Identify project team					
Confirm partners/collaborators (including subcontractors if applicable)					
Identify sources for letters of support/Collaboration					
Make delivery plan and back up delivery plan					
<i>Gathering/Updating Materials:</i>					
Compile organizational capabilities/experience					
Obtain letters of support/ MOUs					
Compile resumes for ALL project team members					

## PROPOSAL CHECKLIST

**RFP TITLE:**

**RFP #:**

<b>Task</b>	<b>Assigned to</b>	<b>Due Date</b>	<b>Done</b>	<b>N/A</b>	<b>Notes</b>
Update resumes for project team					
Compile bios for ALL project team members					
Obtain current salaries for staff					
Obtain cost information for any project costs (travel, materials, etc.)					
Compile all required appendices (add row for each)					
<i>Writing:</i>					
<i>Technical Proposal:</i>					
Write need/problem statement					
Write organizational structure/capacity					
Write project description/approach					
Write work plan with task outline					
Write monitoring and evaluation section					
Write partnership/collaboration section					
Write executive summary/abstract (as needed)					
<i>Budget:</i>					
Prepare budget detail in RFP-required format					
Write budget narrative					
<i>Review:</i>					

## PROPOSAL CHECKLIST

**RFP TITLE:**

**RFP #:**

<b>Task</b>	<b>Assigned to</b>	<b>Due Date</b>	<b>Done</b>	<b>N/A</b>	<b>Notes</b>
Read for consistency/coherence					
Read for consistency of format (text headings, etc)					
Verify that all sections are included					
Verify RFP-specific requirements are met					
Confirm that evaluation criteria are met					
Review for agreement between narrative and budget items					
Review and approve budget					
Verify all required appendices are included					
<i>Assembly:</i>					
Put on headers and/or footers					
Number pages sequentially					
Prepare Table of Contents					
Prepare cover sheet					
Prepare transmittal /submission letter					
Sign transmittal/submission letter					
Make _____ copies (if submitted hard copy)					
Verify electronic document meets submission requirements (if submitted electronically)					
<i>Transmittal:</i>					
Prepare transmittal packages and slips					
Send _____ hard copies to funding agency					
Send _____ electronic copies to funding agency					
Verify receipt by funding agency					

## PROPOSAL CHECKLIST

**RFP TITLE:**

**RFP #:**

<b>Task</b>	<b>Assigned to</b>	<b>Due Date</b>	<b>Done</b>	<b>N/A</b>	<b>Notes</b>
<i>Post proposal:</i>					
Combine proposal files and archive					
<i>Post award:</i>					
(If not awarded) conduct debriefing session with funding agency					
Conduct post award meeting with proposal team					

## PROPOSAL CHECKLIST

**RFP TITLE:**

**RFP #:**

<b>DOCUMENT CONTENTS</b>	<b>INCLUDED</b>	<b>N/A</b>
<i>Narrative:</i>		
Cover		
Cover Sheet		
Transmittal/Submission Letter		
Table of Contents		
Executive Summary		
Description of Need/Problem		
Organizational Structure & Capacity		
Project Description/Approach		
Monitoring/Evaluation Approach		
Partnership/Collaboration		
Sustainability		
<i>Budget:</i>		
Budget Forms		
Budget Narratives		
<i>Appendices:</i>		
Resumes/CVs		
Letters of support/collaboration		
Organizational Chart		