

Attachment 1: Proposal Checklist (Annotated)

“The way you know you’re having an adventure is when [at some point during the process]

You wish you were home in bed. – Mark Twain

ACTIVITY	DONE	WORKIN’ ON IT	TO DO	N/A
PHASE 1: BEFORE THE REQUEST FOR PROPOSAL IS ISSUED				
Research potential client: Do we know the customer? Understand needs/expectations, decision-making process, technical challenges; cost/best value requirements; etc?. Can we influence draft RFP (e.g., type of contractor; small business set-aside.)?				
Seize opportunities to be visible to the client. Do they know our company?. Submit capabilities statement, respond to Sources Sought requests, “walk the halls,” network professionally/socially:				
Analyze potential competition: What company(s) might want to do this work?. Strengths and weaknesses. Mitigation.				
Strategize: Draft “Win Plan Worksheet (ATT. 2) to be completed when RFP released. Develop tentative time line for 30, 45,60 days. Meet with possible teaming partners.				
Organize for proposal effort:: Register for notification of RFP release. Identify Acquisition Manager, Proposal Manager, Coordinator, Program Manager for Contract. Possible proposal team composition; communication, resources.				
Draft Win Themes and Discriminators: Why us. Why not us. Unique. Assertive and factual. Competitive.:				
PHASE 2: PROPOSAL RECEIPT AND PREPARATION FOR PROPOSAL PROCESS				
Analyze RFP: Prepare/Submit questions for clarification of RFP.				
Develop Requirements-Driven Outline. Map content to requirements in Sections L & M of RFP				
Prepare conformance matrix to make sure all proposal requirements are covered				
Complete Win Plan Worksheet (ATT 2). To team or not to team? Likely competition? Small business provisions?				
Identify Production/Delivery Requirements: Establish requirements related to font type/size, number of pages, resume format, page layout.				
Assess Space and Resources for effective proposal team collaboration. Secure internet/email access, “war room” for storyboarding/brainstorming, computers, printers, scanner, FAX				
Refine Proposal Schedule taking into account RFP submittal date, location, and production requirements; review/approval cycle; proposal team stamina;				

ACTIVITY	DONE	WORKIN' ON IT	TO DO	N/A
Identify cost/corporate finance experts. Justify realistic target rates. Establish communication for consistence between cost and technical volumes (Note: Technical proposal team usually interfaces only indirectly with cost volume/contract team proposal., but some narrative may be required in cost volume)				
Assemble proposal team/prepare for kickoff; Prepare individual writer instructions (give writers only what they need for their sections, not the whole thing)				
PHASE 3: PROPOSAL PREPARATION				
Refine proposal outline and schedule for compliance with all RFP requirements, timely submission				
Proposal kickoff meeting. Make assignments; establish <i>firm</i> deadlines. Distribute Win Plan Worksheet and individualized instructions to subject matter/technical section writers. Coordinate with any teaming partners				
Key Roles/Selection of proposed staff, tied to expertise/experience, salary and availability; Tweak resumes, consistent with proposal instructions, win themes				
Technical Understanding. Interview or collaboratively iterate material developed by subject matter experts (SMEs)				
Management Strategy. Select proposed organization for contract; describe safety, QA, management systems				
Past Performance Strategy: Include specific contracts to be cited; methods for addressing any issues; available of favorable referents. Tweak project descriptions. Notify potential referents				
Corporate Experience stories to answer “how to” scenarios with “we’ve done it” testimonials				
Gather materials for production/distribution: CDs, binders, special computer software. Test for any anomalies that might occur in printing or electronic distribution.				
Graphic Design: Cover, page design, tabs, web page, CD labels, etc. – consistent with Proposal instructions.				
Draft Executive Summary and cover letter, and oral presentation if necessary.				
Review/update conformance matrix				
Freeze draft; perform substantive and copy edit				
PHASE 4: REVIEW AND REVISION				
Blue Team Internal Review. Responsive to RFP? Ease of evaluation? Themes incorporated? Internally consistent and with cost proposal? Well organized? etc. (Blue Team Review)				
Continuously verify compliance matrix. Match current draft; match content to evaluation criteria, RFP instructions/ requirements				
Facilitate Red Team Review. Selected reviewers should be senior; not working on proposal, but familiar with client. .. Conduct editorial review of Red Team draft in parallel with peer				

ACTIVITY	DONE	WORKIN' ON IT	TO DO	N/A
review. (Note: If submitting electronically, provide planned templates to reviewers; if hardcopy, provide cover design; executive summary; cover letter; Red Team draft.				
Recovery, comment resolution, and revision process. Verify compliance with all RFP requirements. Produce final draft.				
PHASE 5: PRODUCTION PROCESS				
Technical and copy edit. Edit final draft for consistency, accuracy, grammar, format by independent editor. Link Table of Contents if submitted for online review. .				
Test print. Verify that proposal submitted by internet interface, email, or CD will print as intended for Evaluators				
Coordinate all volumes for final reproduction, quality control, etc.				
Delivery of proposal. Consider primary and backup delivery methods for hardcopy and electronic submission. Distribute internal copies.				
PHASE 5: FOLLOWING PROPOSAL SUBMISSION				
Respond to any Clarification Requests following submission				
Submit Best and Final Offer (BAFO) if requested. Revise proposal if necessary for consistency with BAFO.				
Oral Presentation. Prepare to assemble proposed key personnel and prepare oral presentation for Orals.				