
# PROPOSAL CHECKLIST

These checklists are designed to help you navigate the complexities of government proposals, ensuring that you meet all requirements and increase your chances of winning the contract.

## Pre-Proposal Checklist

Before diving into the proposal, ensure you've covered these essential steps:

- **Ensure No Expiration:** Verify that your SAM registration is active and not expired.
- **Update SAM.gov Profile:** Check that your address, points of contact, and other details are current.
- **Understand Requirements:** Familiarize yourself with LPTA, best value, and tradeoff criteria.
- **Assess Volume Needs:** Determine needs for technical, pricing, past performance volumes, etc.
- **Verify NAICS Code Alignment:** Ensure the NAICS code aligns with your capabilities and services.
- **Confirm Solicitation Alignment:** Ensure all aspects of the solicitation align with your company's capabilities.
- **Add Entity to SAM.gov (If Necessary):** If your entity is not listed, ensure it is added.
- **Determine Set-Aside Eligibility:** Identify applicable set-asides such as WOSB, SDVOSB, HUBZone, 8(a).
- **Attend Pre-Proposal Events:** Attend Pre-Proposal Conference or Site Visit (if applicable) and gather necessary insights.
- **Document Clarifications:** Record any clarifications or answers to questions provided.
- **Submit Questions Promptly:** Ensure all questions are submitted before the Q&A deadline.
- **Track Government Responses:** Save responses for compliance verification.

## Proposal Checklist

This checklist will guide you through the critical steps of preparing and submitting your proposal:

- **Note Due Date & Submission Format:** Record the exact deadline, including date, time, and time zone.
- **Confirm Delivery Method:** Verify submission method (email, PIEE, SAM, FedConnect, etc.).
- **Create Compliance Matrix:** Align each requirement with its response in your proposal.

- **Develop Proposal Calendar:** Plan internal deadlines for drafts, pricing, reviews, and approvals.
- **Prepare Cover Page:** Include Solicitation number and project title, Company name, UEI, CAGE code, SBA status statement, “Proposal valid for 60 days”, Signature authority and title
- **Ensure Formatting Compliance:** Check font type/size, margins, spacing, and page limits per section.
- **Complete Reps & Certs**
- **Acknowledge All Amendments**
- **Sign Solicitation Documents**
- **Detail Technical Approach:** Tailored to SOW with details on meeting/exceeding requirements.
- **Develop Management Approach:** Include Staffing plan, Org chart with roles/responsibilities, Risk mitigation, Schedule adherence
- **Include Relevant Past Performance:** Use templates, match scope/NAICS/size, include CPARS or narrative.
- **Provide Key Personnel Resumes:** Match key roles, highlight relevant experience and qualifications.
- **Detail Pricing:** Use table format for labor categories, hours, rates, totals; match CLIN structure.
- **Include Table of Contents:** Hyperlink if digital, finalize page numbers before submission.
- **Add Solicitation Number to Header/Footer:** Every page.
- **Review Attachments:** Ensure all required forms, certifications, and submittals are included.
- **Run Final Compliance Check:** Verify against solicitation instructions and evaluation criteria.
- **Convert & Name Files:** Convert to PDF, flatten files, name files as instructed.
- **Submit On Time:** Obtain confirmation or timestamped email receipt and retain proof of submission.

## Final Thoughts

By diligently following these checklists, you can significantly improve the quality and completeness of your government proposals. Remember that meticulous attention to detail and thorough compliance with all requirements are crucial for success. Good luck!