

Proposal Preparation Checklist

1. RFP/Documents

- Obtain complete copy of RFP
- Distribute RFP to appropriate staff
- Prepare questions for submission to the contacting officer
- Receive and review responses to questions
- Collect, distribute and review pertinent background documents
- Submit letter of intent, if necessary
- Make special note of deadlines for submission

2. Preparing for the Proposal

- Hold strategy meetings, if necessary
- Determine number and type of staffing needs
- Identify equipment and/or supply needs
- Obtain specs and costs of any equipment
- Gather background data/statistics
- Sketch rough draft of budget
- Identify proposal writer
- Make sure organization meets mandatory criteria

3. Proposal

- Prepare draft outline of proposal
- Determine document format (font, major/minor headings, etc.)
- Determine page numbers for each section
- Determine review, feedback and editing process

4. Gathering Appendices

- Collect CVs of all individuals participating in the project
- Obtain any additional information from participants, if necessary

- Obtain letters of support
- Gather any special pages, charts, etc.

5. Finishing Touches

- Proofread all sections
- Prepare table of contents
- Prepare cover letter
- Have “outsider” read proposal

6. Packaging

- Make required numbers of copies of proposal
- Check pages in each copy for legibility
- Make sure no pages are missing
- Determine how proposal will be packaged
- Ensure sufficient quantities of all packaging items are available

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