RFP compliance checklist

Work through this list before the final files leave your office. Most proposals that are rejected without being scored fail on something in this list, so it is worth one careful pass by someone who did not write the response.

The solicitation

- [ ] We have the complete RFP package, including every attachment and exhibit.
- [ ] Every amendment and addendum is downloaded, read and acknowledged where the RFP asks.
- [ ] Answers to bidder questions have been read and reflected in the response.
- [ ] The deadline, time zone and submission method are confirmed in writing.

Requirements

- [ ] A compliance matrix lists every "shall," "must" and requested item.
- [ ] Each requirement in the matrix points to the page or section that answers it.
- [ ] The response follows the section order and headings the RFP requests.
- [ ] Every question in the RFP has an answer, even when the answer is "not applicable" with a reason.
- [ ] Mandatory qualifications are stated plainly and supported with evidence.

Content

- [ ] The executive summary names the buyer's goals and how the response meets them.
- [ ] Staff named in the proposal have agreed to be named and are available.
- [ ] References have given permission and their contact details are current.
- [ ] Claims about past projects can be supported if an evaluator asks.
- [ ] Names, dates and figures match across every section.

Pricing

- [ ] Pricing uses the buyer's fee schedule or price form exactly as provided.
- [ ] The pricing narrative matches the numbers in the price form.
- [ ] Totals, unit prices and extensions have been recalculated by a second person.
- [ ] Pricing is placed where the RFP says, sealed or in a separate file if required.

Forms and signatures

- [ ] Every required form is included and complete.
- [ ] Signatures are from a person authorized to bind the organization.
- [ ] Notarized forms, if any, are notarized.
- [ ] Insurance certificates and licenses are current through the contract start date.

Format and delivery

- [ ] Page limits, font sizes and margins follow the RFP.
- [ ] File names, file types and file sizes follow the submission instructions.
- [ ] Printed copies, if required, are the right number and are bound as instructed.
- [ ] The final files have been opened once more after export to check they display correctly.
- [ ] Submission is planned for at least one day before the deadline.
- [ ] Proof of submission, such as a portal receipt or courier record, is saved.

Otter International Proposals, a business of Otter International, LLC. This checklist is general guidance. Always follow the instructions in the RFP you are answering, and have contract terms reviewed by your own counsel.