

## GUIDE GSC

# Federal Proposal Writing Checklist

*Step-by-step verification for complete, compliant, and competitive submissions*

## Prepared by: Guide GSC

Use this checklist for every federal proposal submission to ensure compliance with the solicitation, alignment with evaluation criteria, and competitive quality before final upload.

Solicitation #: \_\_\_\_\_ Agency: \_\_\_\_\_ Due Date: \_\_\_\_\_

## Phase 1 — Solicitation Intake & Bid Decision

*Confirm the opportunity is real, allowable, and worth pursuing before anyone writes a word.*

| ✓                        | Checklist Item                                                                             | Owner / Notes |
|--------------------------|--------------------------------------------------------------------------------------------|---------------|
| <input type="checkbox"/> | Solicitation document downloaded in full from SAM.gov, eBuy, or issuing agency portal      |               |
| <input type="checkbox"/> | All amendments, Q&A responses, and modifications retrieved and incorporated                |               |
| <input type="checkbox"/> | Solicitation type identified (RFP, RFQ, RFI, IFB, BAA, BPA call, task order)               |               |
| <input type="checkbox"/> | Set-aside designation confirmed (Full & Open, 8(a), WOSB, SDVOSB, HUBZone, Small Business) |               |
| <input type="checkbox"/> | NAICS code and size standard verified against company SAM registration                     |               |
| <input type="checkbox"/> | PSC / FSC code reviewed for scope alignment                                                |               |
| <input type="checkbox"/> | Place of performance confirmed (CONUS, OCONUS, specific facility)                          |               |
| <input type="checkbox"/> | Period of performance and option years documented                                          |               |
| <input type="checkbox"/> | Contract type identified (FFP, T&M, CPFF, CPIF, IDIQ, hybrid)                              |               |
| <input type="checkbox"/> | Estimated contract value or ceiling reviewed against bonding/financial capacity            |               |

| ✓                        | Checklist Item                                            | Owner / Notes |
|--------------------------|-----------------------------------------------------------|---------------|
| <input type="checkbox"/> | Bid/no-bid decision documented with capture team sign-off |               |

## Phase 2 — Compliance & Requirements Analysis

*Build the compliance backbone. If it isn't on the matrix, it won't make it into the proposal.*

| ✓                        | Checklist Item                                                                 | Owner / Notes |
|--------------------------|--------------------------------------------------------------------------------|---------------|
| <input type="checkbox"/> | Compliance matrix built from Sections L (Instructions) and M (Evaluation)      |               |
| <input type="checkbox"/> | Every requirement from Section C (PWS/SOW/SOO) cross-referenced and traced     |               |
| <input type="checkbox"/> | FAR/DFARS clauses in Section I reviewed and impact assessed                    |               |
| <input type="checkbox"/> | Section K representations and certifications complete and accurate             |               |
| <input type="checkbox"/> | Mandatory forms identified (SF-33, SF-1449, SF-30, SF-LLL, etc.)               |               |
| <input type="checkbox"/> | Page limits, font, margin, line spacing, and file format requirements logged   |               |
| <input type="checkbox"/> | Volume structure mapped (Technical, Management, Past Performance, Price, etc.) |               |
| <input type="checkbox"/> | Submission method confirmed (SAM.gov, email, portal upload, hand delivery)     |               |
| <input type="checkbox"/> | Proposal due date, time, and time zone recorded with internal buffer added     |               |
| <input type="checkbox"/> | Questions deadline calendared and clarification questions submitted on time    |               |

## Phase 3 — Capture Strategy & Proposal Planning

*Set up the win before drafting. Strategy, teaming, and assignments locked in.*

| ✓                        | Checklist Item                                                                | Owner / Notes |
|--------------------------|-------------------------------------------------------------------------------|---------------|
| <input type="checkbox"/> | Capture plan complete with customer hot buttons and discriminators identified |               |
| <input type="checkbox"/> | Win themes drafted and validated by capture/BD lead                           |               |

| ✓                        | Checklist Item                                                                 | Owner / Notes |
|--------------------------|--------------------------------------------------------------------------------|---------------|
| <input type="checkbox"/> | Ghosting strategy defined for known competitors                                |               |
| <input type="checkbox"/> | Teaming agreements, NDAs, and subcontractor letters of commitment executed     |               |
| <input type="checkbox"/> | Key personnel identified with signed letters of intent and current resumes     |               |
| <input type="checkbox"/> | Past performance references selected and CPARS/PPQs requested early            |               |
| <input type="checkbox"/> | Pricing strategy approved (cost build-up, competitive positioning, fee target) |               |
| <input type="checkbox"/> | Color team review schedule set (Pink, Red, Gold, White Glove)                  |               |
| <input type="checkbox"/> | Proposal manager, volume leads, and writers assigned with deliverable dates    |               |
| <input type="checkbox"/> | Kickoff meeting held; storyboards and writing assignments distributed          |               |

## Phase 4 — Writing & Content Development

*Draft to the evaluator's scoresheet — clarity, traceability, and proof of capability.*

| ✓                        | Checklist Item                                                                   | Owner / Notes |
|--------------------------|----------------------------------------------------------------------------------|---------------|
| <input type="checkbox"/> | Executive summary clearly states understanding, approach, and discriminators     |               |
| <input type="checkbox"/> | Technical approach addresses every PWS task with traceability to Section L       |               |
| <input type="checkbox"/> | Management approach covers staffing, transition, risk, quality, and reporting    |               |
| <input type="checkbox"/> | Past performance write-ups demonstrate relevance in size, scope, and complexity  |               |
| <input type="checkbox"/> | Resumes tailored to labor category requirements and key personnel qualifications |               |
| <input type="checkbox"/> | Win themes woven consistently throughout all volumes                             |               |
| <input type="checkbox"/> | Action captions on every graphic communicate the benefit, not just the content   |               |

| ✓                        | Checklist Item                                                 | Owner / Notes |
|--------------------------|----------------------------------------------------------------|---------------|
| <input type="checkbox"/> | Acronyms defined on first use; glossary included if required   |               |
| <input type="checkbox"/> | Compliant tone, voice, and tense maintained across authors     |               |
| <input type="checkbox"/> | Section/page cross-references accurate and updated after edits |               |

## Phase 5 — Reviews & Quality Control

*Color team reviews catch what authors can't see. Don't skip them.*

| ✓                        | Checklist Item                                                                       | Owner / Notes |
|--------------------------|--------------------------------------------------------------------------------------|---------------|
| <input type="checkbox"/> | Pink Team review completed; structural and strategic feedback incorporated           |               |
| <input type="checkbox"/> | Red Team review completed using actual evaluation criteria; scored against Section M |               |
| <input type="checkbox"/> | Gold Team / executive review completed with sign-off from leadership                 |               |
| <input type="checkbox"/> | Compliance matrix reverified after all revisions — every shall/will/must addressed   |               |
| <input type="checkbox"/> | Page count verified for each volume (under limit, no orphan headings)                |               |
| <input type="checkbox"/> | Graphics legible at print size; alt text and captions present                        |               |
| <input type="checkbox"/> | Cross-references, TOC, page numbers, headers/footers all updated                     |               |
| <input type="checkbox"/> | Spelling, grammar, and proper noun consistency checked (agency name, program name)   |               |
| <input type="checkbox"/> | FOUO, CUI, ITAR, or proprietary markings applied per requirements                    |               |
| <input type="checkbox"/> | Final proofread by someone who did NOT write the proposal                            |               |

## Phase 6 — Cost Volume & Pricing

*Realistic, traceable, and defensible pricing wins on best value and survives audit.*

| ✓                        | Checklist Item                                                                    | Owner / Notes |
|--------------------------|-----------------------------------------------------------------------------------|---------------|
| <input type="checkbox"/> | Cost/price volume reconciles to technical and management volumes (LOE, labor mix) |               |

| ✓                        | Checklist Item                                                                             | Owner / Notes |
|--------------------------|--------------------------------------------------------------------------------------------|---------------|
| <input type="checkbox"/> | Direct labor rates supported by payroll data or letters of commitment                      |               |
| <input type="checkbox"/> | Indirect rates (fringe, overhead, G&A) traceable to DCAA-approved or forward-pricing rates |               |
| <input type="checkbox"/> | Subcontractor pricing supported by quotes and consent-to-subcontract documentation         |               |
| <input type="checkbox"/> | Travel, ODCs, and material costs justified with basis-of-estimate (BOE) narratives         |               |
| <input type="checkbox"/> | Profit/fee aligns with weighted guidelines or competitive benchmarks                       |               |
| <input type="checkbox"/> | Cost realism analysis performed (no understaffing, no buy-in pricing)                      |               |
| <input type="checkbox"/> | Price-to-win analysis compared against independent government estimate (IGE)               |               |
| <input type="checkbox"/> | All math verified — totals, extensions, escalation, and option year roll-ups               |               |
| <input type="checkbox"/> | Pricing assumptions and exceptions documented in narrative                                 |               |

## Phase 7 — Compliance, Certifications & Representations

*Administrative defects can disqualify an otherwise winning proposal. Verify every box.*

| ✓                        | Checklist Item                                                                                        | Owner / Notes |
|--------------------------|-------------------------------------------------------------------------------------------------------|---------------|
| <input type="checkbox"/> | SAM.gov registration active; UEI and CAGE code current and matching cover page                        |               |
| <input type="checkbox"/> | Reps and certs in SAM updated within 365 days                                                         |               |
| <input type="checkbox"/> | All Section K certifications signed by authorized representative                                      |               |
| <input type="checkbox"/> | Required attachments included (financial statements, accounting system approval, facility clearances) |               |
| <input type="checkbox"/> | FCL / personnel clearances verified if classified work required                                       |               |
| <input type="checkbox"/> | Section 889 (covered telecom) certification completed                                                 |               |
| <input type="checkbox"/> | Buy American / Trade Agreements Act compliance addressed                                              |               |

| ✓                        | Checklist Item                                                                        | Owner / Notes |
|--------------------------|---------------------------------------------------------------------------------------|---------------|
| <input type="checkbox"/> | DFARS cybersecurity requirements (NIST SP 800-171, CMMC) documented                   |               |
| <input type="checkbox"/> | Organizational Conflict of Interest (OCI) mitigation plan included if applicable      |               |
| <input type="checkbox"/> | Service Contract Act (SCA) wage determinations applied to applicable labor categories |               |

## Phase 8 — Production & Submission

*The last mile. Upload early, confirm receipt, archive everything.*

| ✓                        | Checklist Item                                                                               | Owner / Notes |
|--------------------------|----------------------------------------------------------------------------------------------|---------------|
| <input type="checkbox"/> | Final files named per solicitation convention (volume, version, date)                        |               |
| <input type="checkbox"/> | PDF/A or required format conversion completed; bookmarks and TOC functional                  |               |
| <input type="checkbox"/> | File sizes within portal upload limits; no embedded macros or links                          |               |
| <input type="checkbox"/> | Test upload performed in submission portal at least 24 hours before deadline                 |               |
| <input type="checkbox"/> | Backup submission method ready (alternate uploader, second internet connection)              |               |
| <input type="checkbox"/> | Submission confirmation email/receipt captured and saved                                     |               |
| <input type="checkbox"/> | Hard-copy submission (if required) shipped with tracking and proof of delivery               |               |
| <input type="checkbox"/> | Internal proposal archive saved with final files, compliance matrix, and color team comments |               |
| <input type="checkbox"/> | Debrief request prepared in advance for post-award submission                                |               |
| <input type="checkbox"/> | Lessons learned session scheduled within two weeks of award notification                     |               |

## Final Sign-Off

*Document accountability. No proposal leaves Guide GSC without these signatures.*

| Role                                  | Responsibility                                                                    | Signature | Date |
|---------------------------------------|-----------------------------------------------------------------------------------|-----------|------|
| <b>Proposal Manager</b>               | Confirms compliance matrix is 100% complete and submission package is final.      |           |      |
| <b>Capture Manager / BD Lead</b>      | Confirms win themes and discriminators are reflected throughout.                  |           |      |
| <b>Pricing Lead</b>                   | Confirms cost volume is mathematically accurate and pricing strategy is approved. |           |      |
| <b>Contracts / Compliance Officer</b> | Confirms reps, certs, FAR/DFARS, and authorized signatures are in order.          |           |      |
| <b>Executive Sponsor</b>              | Final approval to submit.                                                         |           |      |

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**Guide GSC — Government Contract Services**

*This checklist is a living document. Update after each submission with lessons learned and refinements.*