| Checklist Items | |
| --- | --- |
| Name(s) | **Production Personnel** |
|  | Proposal Manager |
|  | Proposal Coordinator |
|  | Production Manager; Manager, Proposal Operations |
|  | Graphic Designers |
|  | Editors |
|  | Desktop Publishers |
|  | White Glove Reviewers (include only proposal department staff for security/continuity) |
| ✓Confirmed | **Production Resources** |
|  | IT/Facilities support for computers and printers  ***Note:*** *Make friends with IT and Facilities staff­—they can literally “save” our proposal in emergencies. Explain how we do proposals so they’ll “be aware” of our needs (and the importance of proposals to our company’s success) when we come running down the hallway for help!* |
|  | Emergency plans—develop an emergency procedure and make it available to the proposal team in case we lose our electricity, computers, network, or facility during proposal production |
|  | Backups (or backup procedure) for electronic documents |
|  | Network/collaborative system (e.g., SharePoint) |
|  | Confirm with IT staff that backups are made in real-time |
|  | Test system and know how to get to the backups in case of emergency |
|  | Portable backup systems—during production, back up proposal files to portable backup systems every hour in case of catastrophic failure of computers/network (thumb drive, portable hard drive, CD/DVD, email to yourself (alternate email address accessible from outside the network)) |
|  | Backup proposal production site identified and confirmed to complete proposal production and submit/upload proposal in case of need to move proposal off-site |
| Time Required | **Production Time Estimates** |
|  | Desktop publishing |
|  | Editing |
|  | Final graphics revisions |
|  | Time to prep files |
|  | Printing—including time required to send files to printers (both standalone printers and production shops or outside vendors) |
|  | CD/DVD burning, testing, and insertion into cases/sleeves |
|  | CD label printing and affixing |
|  | CD case insert printing and insertion |
|  | Paper punching (for 3-ring or alternate binding method) |
|  | Binding (3-ring binders, spiral binding, other binding method) |
|  | Paper folding (inserts)—manual or folding machine, e.g., Z folder |
|  | Collating—different sections of proposal |
|  |  |
| Time Required | **Production Time Estimates** |
|  | Inserting special inserts or 11”x17" pages that have been punched  appropriately and folded |
|  | Proposal covers/spine—confirm info on covers/spines, print, trim, stuff in binders |
|  | “White Glove” page checking/book checking |
|  | Packaging (stuffing boxes, inserting packing lists per RFP instructions, sealing/labeling, putting in vehicles)   * Double check packing list to be sure everything is inserted into proper boxes * Prepare packing labels ahead of time and confirm against last amendment for any delivery location changes |
|  | 2nd backup delivery set/in-house set preparation (add required time to estimates above)—prepare a complete backup/2nd delivery set of proposal and package for delivery and use it as the in-house set if 1st set is delivered successfully (store in limited access locked room until delivery confirmed) |
| Est. Cost | **Production Supplies/Costs Estimated (if necessary) [revise as necessary]** |
| $ | *Hardcopy printing* |
| $ | * Rush? |
| $ | * Color? |
| $ | * Black & white? |
| $ | * Full bleed? |
| $ | * Double sided? |
| $ | *Paper* |
| $ | * Binder covers/spines (usually heavyweight 11”x17” and trimmed to size) |
| $ | * Proposal “meat” (usually 8.5”x11” and 11”x17” for foldouts) |
| $ | * Colored paper for inserts |
| $ | *Tab/divider inserts* |
| $ | *Boxes* |
| $ | * Off-the-shelf |
| $ | * Recycled binder boxes |
| $ | *Binding* |
| $ | * Binders (check binders for damage upon delivery) |
| $ | * Inserts |
| $ | *CDs/DVDs* |
| $ | * Case inserts |
| Est. Cost | **Delivery** |
| $ | Employee cars (mileage, parking) |
| $ | Commercial vendor, e.g., FedEx, UPS, U.S. Mail, courier |
| $ | Employee delivery via airline—airfare |
| $ | Food |
| $ | Hotel |
| $ | Rental Car(s) |